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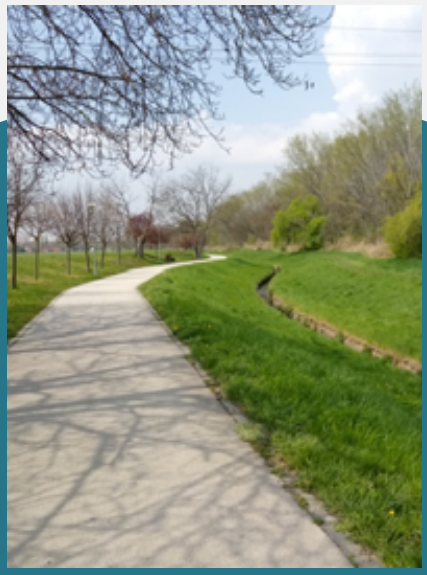

# GUIDELINES FOR

# ECOSYSTEM SERVICES BASED ECOTOURISM STRATEGY

The project Fostering enhanced ecotourism planning along the Eurovelo cycle route network in the Danube region is financed by Danube Transnational Program 2014-2020

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# Table of Contents

# Table of Contents



# List of Figures



# List of Tables

# List of Abbreviations

| | |
|---|---|
| **CBT** | community based tourism |
| **CDM** | clean development mechanism |
| **CES** | cultural ecosystem services |
| **CSR** | corporate social responsibility |
| **CTC** | Canadian Tourism Commission |
| **DMO** | destination management organization |
| **EBA** | ecosystem based adaptation |
| **ED** | ecological design |
| **ESS** | ecosystem services |
| **IPBES** | International Platform on Biodiversity and Ecosystem Services |
| **IUCN** | International Union for Conservation of Nature |
| **GIS** | geographical information system |
| **KPI** | key performance indicator |
| **MBM** | market based mechanism |
| **NAES** | national ecosystem services assessment |
| **NBS** | nature based solution |
| **NGO** | non-governmental organization |
| **PES** | payment for ecosystem services |
| **POE** | paid, owned and earned |
| **REDD** | reducing emissions from deforestation and forest degradation |
| **SWOT** | strengths, weaknesses, opportunities, threats |
| **UNWTO** | United Nations World Tourism Organization |
| **WCS** | World Conservation Society |

# 1. Executive summary

## 1.1 ECOSYSTEM SERVICES BASED ECOTOURISM

The ecosystem services (ESS) based worldview understands that nature contributes to human well-being and society can operate in a way which reduces or enhances nature's capacity to contribute to our well-being. ESS can be defined as conditions and processes through which ecosystems sustain and enrich human life. Most generally, four types of ESS are differentiated: provisioning, regulating, cultural, and supporting ESS. Tourism in general and ecotourism in particular are usually related to cultural ESS.

Cultural ecosystem services are defined as ecosystems' contribution to the nonmaterial benefits (capabilities, experiences, identities) that arise from human-nature relationships. Cultural ESS are usually separated into diverse categories, such as:

- subsistence
- outdoor recreation
- nature-based education and research
- nature-based artistic
- place-based ceremonial

(Chan et al., 2012).

According to the ecosystem services worldview, recreation and tourism can be understood as activities and experiences through which cultural ESS provide benefits to people. Ecotourism is specifically based on activities and experiences that inherently include an awareness of nature's contribution to human well-being and a willingness to do no harm to nature through recreation and tourism activities.

## 1.2 FOR WHOM?

This guide is addressed to those experts who plan to create an ecotourism strategy based on the concept of ecosystem services (ESS) and with a special focus on cycling tourism, particularly in environmentally sensitive areas where ecotourism is favoured over other types of tourism. This guide aims to be a useful resource for tourism experts, community-builders, environmentalists, and mobility experts, particularly working in teams who aim to create a community-based cycling tourism product based on the concept of ESS.

## 1.3 HOW TO PLAN?

Success of ecotourism projects depends on the cooperation, communication and involvement of different stakeholders (Diamantis 2018). Stakeholders are those actors who may affect or be affected by the ecotourism strategy. Important components of the planning process for an ecosystem services based ecotourism strategy are as follows:

1. Identify the internal and external stakeholders of the ecotourism project and, then, to engage them in a cross-sectoral partnership in which each stakeholder group are able to bring in their competencies
2. Carry out an assessment or mapping of ecosystem services (ESS) taking into account both the scientific perspective of nature conservation and the values the stakeholders attribute to the characteristics of the natural area affected by the ecotourism project

3. Select the values connected to ecotourism and the benefits of ecotourism as a bundle of ESS for the value-based positioning of ecotourism
4. Define the main elements of visitor's ecotourism experience promised by the destination focusing on those values which can help understand and feel the sense of place attached to local nature
5. Create the baseline of the experience, the eco-friendly bike tourism
6. Develop the spatial aspects of ESS based bicycle tourism by a multi-scaled and multi-layered spatial planning process including different types of spatial planning and design
7. Define the sources of funding and consider the appropriate mix of entry fees, taxes, market-based mechanisms (MBM), and payment for ecosystem services (PES)

## 1.4 HOW TO IMPLEMENT?

In ecotourism, sense of place is a co-created visitor experience. Physical environment, culture and nature but also locals, guides, people working in the hospitality industry or in bike rental are all creating this experience together with the tourists. That's why the importance of involving all stakeholders in planning and implementing an ecotourism development is huge.
The other success factor for implementation is regulation. The main goal of regulation is to promote functions and also control impacts based upon the carrying capacity of the site and the infrastructure in order to maintain the ecosystem services in the long-term. In order to achieve a long-term protection and development of ESS, international, national, local and on-site regulatory actions should be considered and, if necessary, changed or newly implemented.
The most relevant scale to develop and implement regulations and policies on ecosystem services related to ecotourism is the regional scale. Based upon the cooperation among the stakeholders, regional policies, tourism development strategies and regional spatial plans as legacies for development could be worked out.
The ecosystem services based ecotourism product packages are complex, nature and culture based service packages with the following characteristics:

- Low impact, small scale: plan and implement through local control and with a high focus on green technologies
- Contains edutainment: educate visitors and locals in an entertaining way, through environmental education, workshops or visitor management support the local community and conservation (direct and indirect)
- Segmented: define slow experience with natural and cultural values; ensuring stakeholder involvement throughout the whole process.

Regarding communication, it should be highlighted that the ecosystem services based ecotourism project should have a clearly defined message at the centre of communication. Messages should be tailored to each stakeholder group. In general, the final versions must be clear, memorable, positive, distinctive, appealing, active.

## 1.5 HOW TO MONITOR?

The model of an ideal evaluation and monitoring toolkit starts with a cross-sectoral framework, with a combination of top-down and bottom-up processes and tools.

Each stakeholder and user group can fulfil different roles and can be enabled to join the evaluation and the monitoring process.

# 2. Baseline: defining ecosystem services based ecotourism

## 2.1 DEFINING ECOSYSTEM SERVICES

Ecosystem services (ESS) has become a significant concept in science and policy making in the fields of land use and landscape planning (both in rural and urban areas), nature conservation and biodiversity protection. Related concepts, such as nature-based solutions (NBS) and ecosystem-based adaptation (EBA) have been experiencing a career in urban design and planning, climate policy making and climate sciences. Policy making at national and global levels have adopted the ecosystem services concept and initiated programmes, of a multi-actor character, in order to raise awareness of the changes needed in both expert and lay people's mind-set concerning human-nature relationships. A few European countries, including Hungary, have embarked on a process called national ecosystem services assessment (NAES). The global political and scientific community has joined forces and established the Intergovernmental Platform on Biodiversity and Ecosystem Services (IPBES) as a science-policy interface aiming for assessing the state-of-the-art knowledge, and at the same time the gaps in existing knowledge, with regard to biodiversity and ecosystem services and their relationship to human well-being at multiple scales, most prominently the global and regional scales.

The ecosystem services based worldview understands that nature contributes to human well-being and society can operate in a way which reduces or enhances nature's capacity to contribute to our well-being. Ecosystem services can be defined as conditions and processes through which ecosystems sustain and enrich human life. Ecosystem functions and processes that have value for people generate ecosystem services. Ecosystem services contribute to diverse human capabilities, experiences, and identities which people value and consider as constitutive of their well-being. The well-known "ecosystem services cascade" illustrates visually (Figure 1) how ecosystem services link nature (ecological functions and processes) and society (human benefits and values) (Potschin and Haines-Young, 2011):

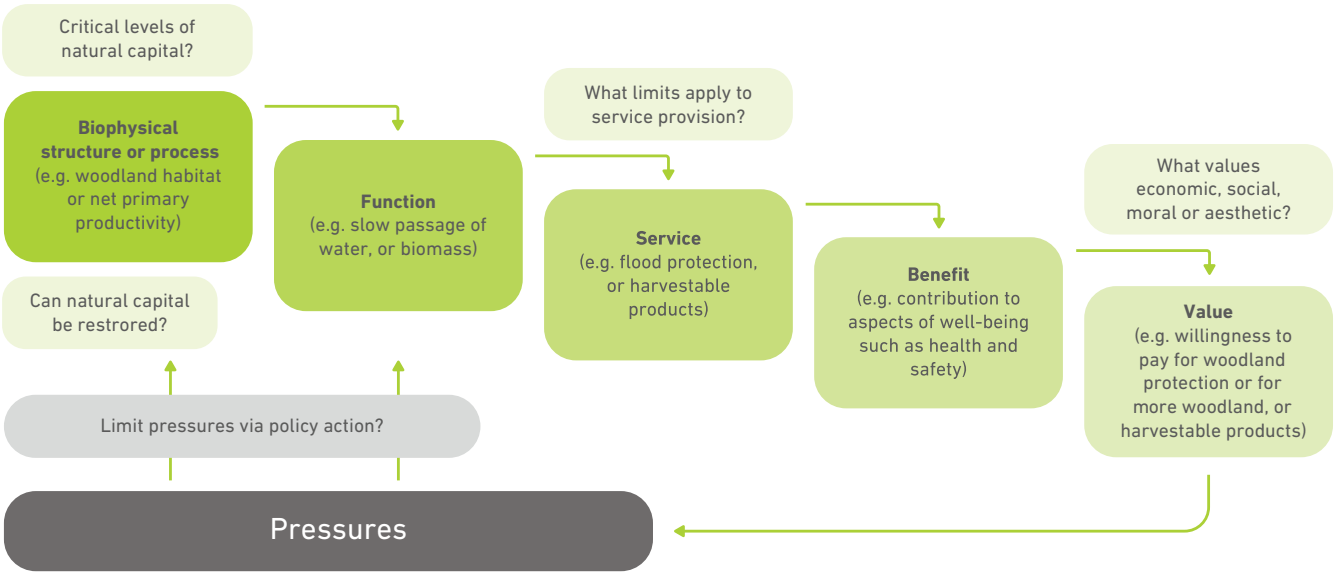


*Figure 1: The ecosystem services cascade (Potschin and Haines-Young, 2011)*

Ecosystem services is called a "boundary concept" due to its potential to link natural and social sciences, ecological and social processes. Thus, the concept of ecosystem services lies at the border of nature and society. Ecosystem services are generated by both ecological and social dynamics and their influence (feedback) upon each other. Ecosystem services are multiple, diverse, and dependent upon each other. There are several attempts to classify ecosystem services. The most well-known is the one produced by the Millennium Ecosystem Assessment (MA, 2005) that classified ecosystem services into four groups:

- Provisioning ecosystem services
- Regulating ecosystem services
- Cultural ecosystem services
- Supporting ecosystem services

Furthermore, the Millennium Ecosystem Assessment directly linked ecosystem services to human well-being (Figure 2):

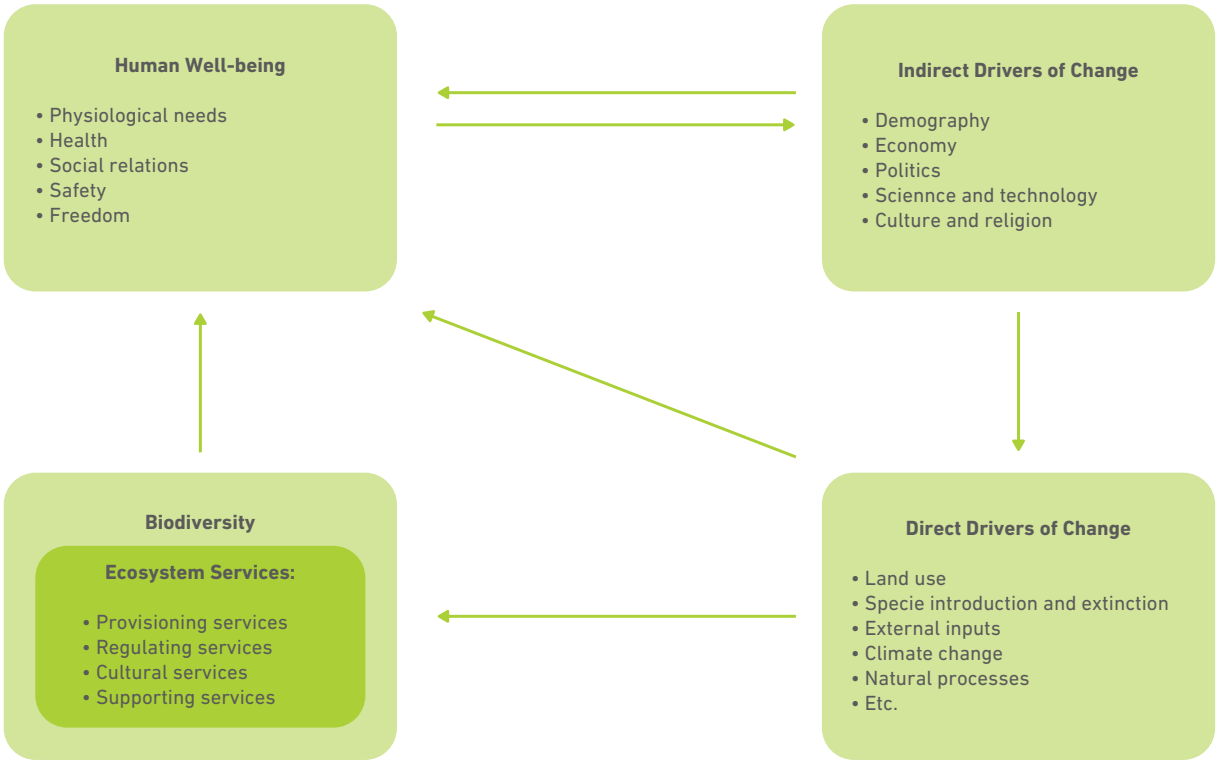


*Figure 2: Links between ecosystem services and human well-being (MA, 2005)*

Cultural ecosystem services (CES) are defined as ecosystems' contribution to the nonmaterial benefits (capabilities, experiences, identities) that arise from human-nature relationships. CES have been separated into many categories. Chan et al. (2012) generated the following CES categories:

- Subsistence
- Outdoor recreation
- Nature-based education and research
  Nature-based artistic
- Place-based ceremonial

These CES categories are linked to multiple categories of benefits that contribute to human well-being (Chan et al., 2012):

- Activity
- Place and heritage
- Spiritual
- Inspiration
- Knowledge
- Existence and bequest
- Option
- Social capital and cohesion
- Aesthetics
- Employment
- Identity
- Material

Cultural ecosystem services are tightly linked to specific features of the material environment and cultural practices. Material and symbolic practices, tangible and intangible benefits cannot be separated in the case of CES (Figure 3).

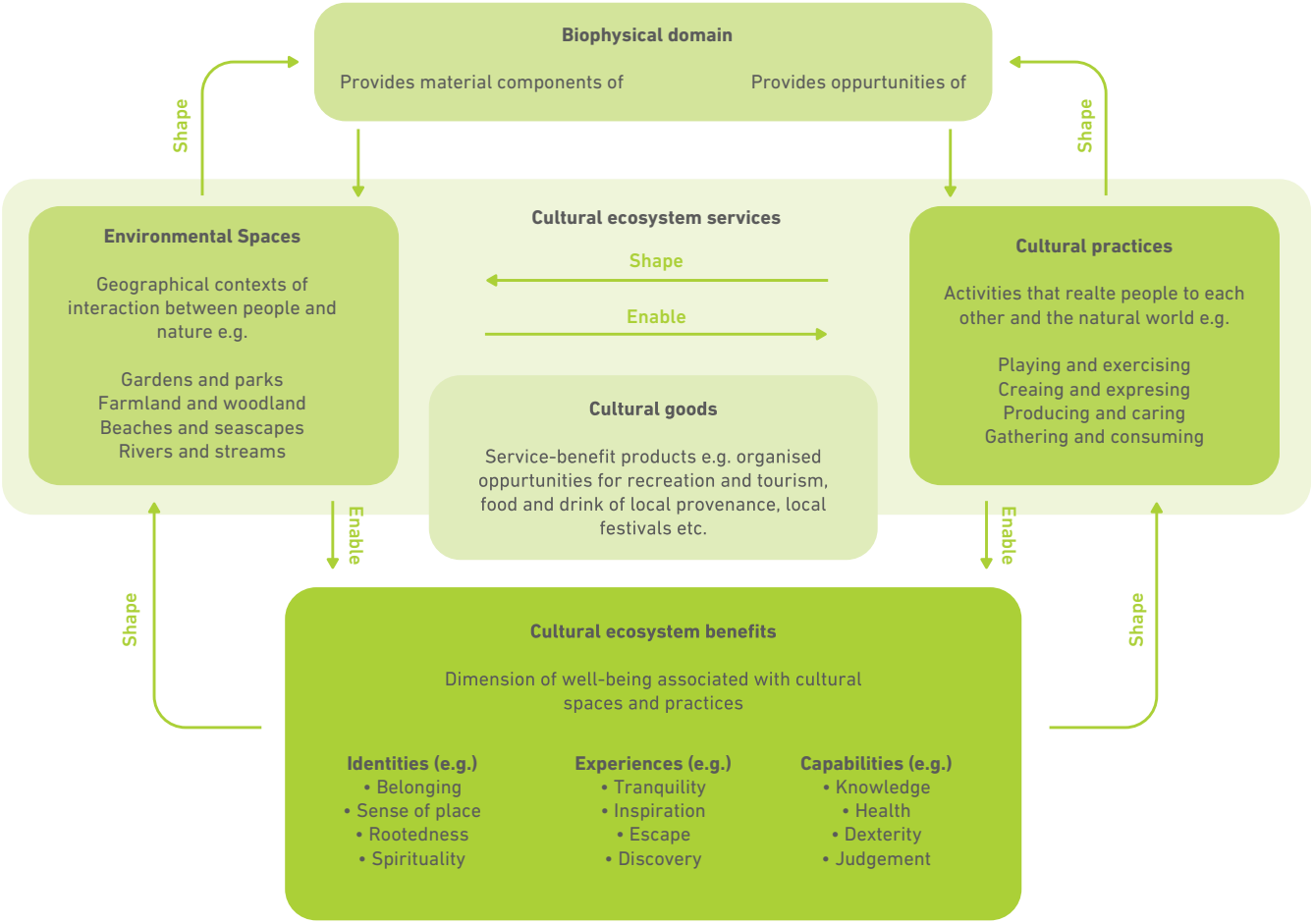


*Figure 3: Cultural ecosystem services as constituted by the material environment and cultural practices (Fish et al., 2016: 211)*

Therefore, according to the ecosystem services worldview, recreation and tourism can be understood as activities and experiences through which cultural ecosystem services provide benefits to people. Ecotourism is specifically based on activities and experiences that inherently include an awareness of nature's contribution to human well-being and a willingness to do no harm to nature through recreation and tourism activities.

## 2.2 MAIN PRINCIPLES OF ECOTOURISM

Ecotourism can be defined as a tourism product. However, there is a difficulty in definition: there are more than over a dozen different definitions of ecotourism in both academic and industry sources. The main debate is over the following issues:

- Light green or dark green? The environmental consciousness of the product is often questioned: "(some authors) misused the term to attract conservation conscious travellers to what, in reality, are simply nature tourism programmes, which have the potential of creating negative environmental and social impacts." (Drumm and Moore, 2002, In: Cobbinah, 2015: 180)
- "Whether democratization should be considered an essential component of ecotourism is open to debate." (Yeo and Piper, 2011:18.) The community-based planning is a challenging issue, particularly in countries with a business culture of low institutional trust, while the effectiveness of this kind of decision-making is questioned.

- There is a strong understanding in academic as well as in practical platforms that ecotourism is used for "green-washing", to market quasi environment-friendly tours and products which actually pollute nature or degrade natural areas (Cobbinah, 2015)

The most comprehensive definition to date has been provided by the United Nation's World Tourism Organization (UNWTO). "Ecotourism refers to forms of tourism which have the following characteristics:

1. All nature-based forms of tourism in which the main motivation of the tourists is the observation and appreciation of nature as well as the traditional cultures prevailing in natural areas.
2. It contains educational and interpretation features.
3. It is generally, but not exclusively organised by specialised tour operators for small groups. Service provider partners at the destinations tend to be small, locally owned businesses.
4. It minimises negative impacts upon the natural and socio-cultural environment.
5. It supports the maintenance of natural areas which are used as ecotourism attractions by:
   - Generating economic benefits for host communities, organisations and authorities managing natural areas with conservation purposes;
   - Providing alternative employment and income opportunities for local communities;
   - Increasing awareness towards the conservation of natural and cultural assets, both among locals and tourists" (UNWTO, 2002: 1)

Based on this definition and the importance of a community-based approach to ecotourism, the main dimensions of ecotourism are as follows:

- **Nature but also culture (if connected):** The focus is mainly on intact or rare values to be conserved.
- **Community-based development:** involving local stakeholders in decision-making.
- **Low impact:** Small-scale tourism with local control, and the usage of green technologies.
- **Education as a key issue:** environmental education of locals and tourists are among the key success factors.
- **Supporting local community and conservation:** direct and indirect support of the local community (income, funding, volunteering).
- **Visitor satisfaction:** Ecotourism should be a memorable experience with the sense of place holding value for each niche-segments with long-term sustainable products.

## 2.3 ECOSYSTEM SERVICES BASED ECOTOURISM

Tourism in general and ecotourism in particular can strategically be developed based on cultural ecosystem services (CES) producing a range of cognitive, emotional, mental, and physical benefits that support human well-being.

Recreation and tourism represent a major opportunity for managing human-nature relationships in a way which benefits from nature's services and, at the same time, cultivates and nurtures nature's capacities to sustainably provide those ecosystem services.

The conceptual framework for an ecosystem services (ESS) based ecotourism planning proposed here is represented by Figure 4:

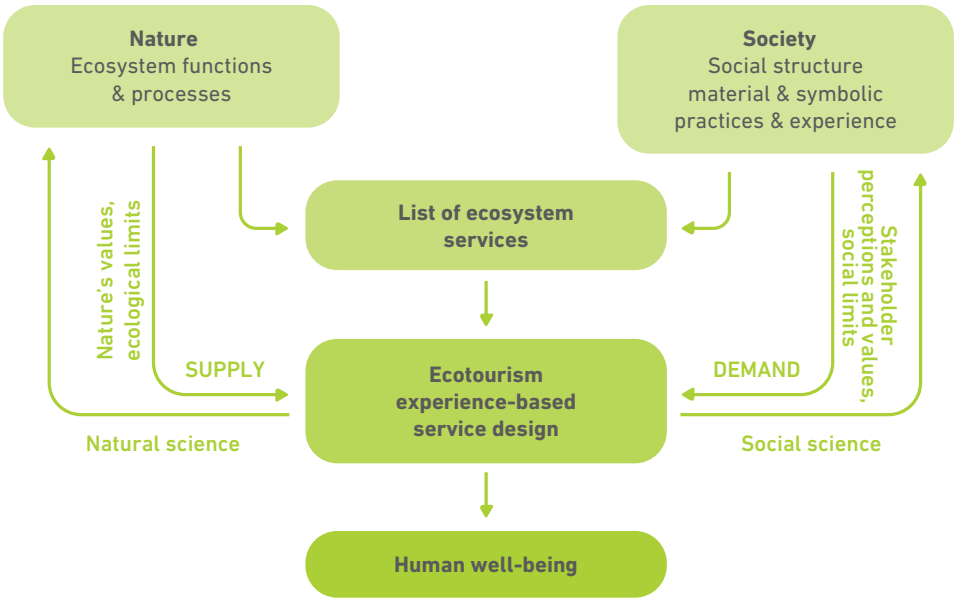


*Figure 4: Conceptual framework for ecosystem services based ecotourism planning*

Developing an ecosystem services (ESS) based ecotourism strategy requires a simultaneous natural science and social science approach, i.e. a multi-disciplinary perspective. Ecosystem services provision should be examined from a natural science perspective in order to understand and list all those services nature conservation professionals consider valuable in the landscape under investigation. At the same time, social scientists should explore the social context, incl. stakeholder mapping together with the mapping of the perception and values of different stakeholder groups regarding their actual use and value attribution to the landscape under investigation. As a result, another list of ecosystem services can be provided based on stakeholders' perception and values.

Confronting the two lists of ecosystem services, i.e., the one constructed by professional nature conservationists and natural scientists and the one containing ESS stakeholders perceived to be significant for themselves, is an important step in order to understand the similarities and differences, i.e. potential joint interests and the conflicting ones. If necessary, interactive learning sessions can be organised in order to bring together different professional and other stakeholders and confront each other's perspectives and provide a space for learning, understanding each other and, probably, changing attitudes, perceptions, and values. A carefully designed participatory and deliberative process may be able to lay down a common baseline or platform that all stakeholders accept. However, it is possible that value conflicts cannot be reconciled and the planning process has to make a choice on some normative bases which will favour particular stakeholders over others in order to continue.

If a comprehensive and joint list of ecosystem services can be constructed based on the two lists of ecosystem services and the participatory-deliberative process mentioned above, ecotourism services can be designed based on the potential experience ecosystem services use might provide to eco-tourists. If the design process follows the principles of community participation and takes into account the ecological and social limits provided by the sustainability of the particular landscape in question, the best chance stands for enhancing human well-being, of both locals and tourists, while conserving or advancing the socio-ecological system, through ecotourism.

# 3. Planning ecosystem services based ecotourism

## 3.1 ECOSYSTEM SERVICES PLANNING PRINCIPLES

### 3.1.1 STAKEHOLDER ENGAGEMENT

Success of ecotourism projects also depends on the cooperation, communication and involvement of different stakeholders (Diamantis, 2018). Stakeholders are the actors and social groups who may affect or be affected by the project.

First, it is necessary to define who the *internal and external stakeholders* are. Internal stakeholders have direct connection to the project: participants in the planning and interpretation process, authorities, investors etc. External stakeholders include different community groups, tourists, users, suppliers, NGOs etc.

Ecosystem services based ecotourism projects have presumably more stakeholder groups than those with other frameworks because "the process of bridging the gaps between ecology and economics" (Braat, 2014) requires more knowledge and approaches.

Potential stakeholders are:

- local community/communities,
- tourists, users,
- suppliers (accommodation, restaurants, bike-services/-rentals...),
- local and national governments, authorities,
- tourism agencies,
- NGOs (locals', environmental, touristic),
- experts of ecotourism, ecology, etc.

Aims and objectives of the different stakeholders can be unrelated – though they have complex perspectives, interests and opportunities – which allocates stakeholders management as one of the most important success factors.

The advantages of the involvement of stakeholders to the planning processes are diversified. The commitment of stakeholders can be increased, mutual learning can take place, conflicts can be recognized, and steps can be taken toward resolving them, institutions and stakeholders get closer to each other (Kovács et al., 2017).

A stakeholder analysis needs to be carried out so as to understand the perspectives, needs, expectations, interests and impact level of stakeholders - inside and outside the project environment. After it, it is possible to assess the level of participation and information needed (which is different for different stakeholders).

Key elements of dealing with the stakeholders are:

- Identifying key events
- Appropriate time schedule
- Briefing and consulting regularly

The success of ecotourism development depends also on the acceptance among local communities. Those projects which exclude local people from the ecotourism planning and management processes usually fail after relatively short period (Garrod, 2003).

The concept of community-based ecotourism assumes that improving local understanding about environmental issues and stimulating positive attitudes towards ecotourism. Locals can be motivated by economic benefits, participation in decision-making processes and developing and preserving their cultural identity (Masud et al., 2017).

The environmental qualification of locals is very important, because the more their environmental knowledge is, the easier it is to stimulate positive attitudes towards ecotourism projects. From this point of view, it is necessary to review the existing awareness raising campaigns of the local/national government or non-governmental organizations (NGOs).

In community-based planning, the following issues have to be considered:

| Define stakeholders to be involved | Examine locals' social relations and relevant societal structures | Decide upon involvement or participation | Consider factors influencing the degree of participation |
|---|---|---|---|
| locals as everyday users and providers of "hospitality atmosphere" | | Passive: informative | Relevance |
| users as potential tourists | | Active: consultation | Social and cultural factors |
| | | Decision-making power: community control | Education status of community groups |
| | | | Economic factors |
| | | | Community infrastructure |
| | | | Political factors |

**Case on Community-based tourism (CBT) in Thailand**

"The Responsible Ecological Social Tours (REST) Project works to assist local Thai communities in developing their own small-scale sustainable tourism projects which aim to develop the skills and confidence of local community members, create an opportunity for host communities and their guests to share their knowledge and experiences, and develop their commitment to protect the natural environment.

According to REST, one of the most important aspects of CBT is that 'communities choose how they wish to present themselves to the world.' REST's CBT projects support grassroots conservation activities and promote environmental awareness. Best examples include:

- In Koh Yao Noi, CBT income has directly supported a local conservation club's coastal patrols to prevent illegal fishing.
- In Koh Yao Noi, CBT has helped to improve the local environment through mangrove rehabilitation plots and seagrass protection.
- In Mae Hong Son, local farmers have begun re-introducing wild orchid species into areas of the forest which had previously been deforested. (Heah, 2006)

**Case on a bottom-up approach: Piedmont - "Colli di Coppi"**

"The development of cycle tourism here is linked to a bottom-up approach driven by a non-profit organization rather than private companies. (...) Here, tourists can enjoy high-quality local products in beautiful natural environments [124] by cycling on well-known roads used by important cyclists of the past [125]. This is an example of a good implementation of local control. In fact, they have organized "informal meetings", called cafés, where local participants exchange views on all aspects of the project (sports, gastronomic, political, and technical) and receive a clear view of the process, including its future and possible problems. The first output of this organization is a sporting event called La Mitica. This race is an event in memory of the Coppi Brothers that promotes "slow" (non-competitive) cycling, representing the pillars of sustainable tourism by allowing the cycle tourists to find mental and physical balance as they enjoy rural features and local products." *(Patrizia Gazzola et al., 2018)*

**Check-list for stakeholder engagement**

- ☒ Review who the stakeholders of your project are: the affected community groups, civil organisations, suppliers, governmental organisations
- ☒ Hold a kick-off event with invitation to all stakeholders
- ☒ Choose a way to bring into light their interests, ideas, opportunities (workshops, focus groups, forums, surveys, conferences)
- ☒ In case of densely populated areas also a survey may be needed to get to know the preferences of the community groups
- ☒ Ask for professional help if necessary
- ☒ Consult regularly

### 3.1.2 VALUE-BASED POSITIONING

Cycling can be an ecotourism activity if the community-based planning above can be implemented, and the most important values considering the landscape and the culture for the stakeholders can be identified.

These values can be the baseline for place identity and the positioning of the destination, as well as for product development. The main idea is to create an "EcoVelo" label, in which all the projects can gain quality management directions as well as a strong brand can be created, which can be useful from the perspective of sustainable management as well as reaching the targeted guest in the fierce competition. The label can be similar to the Transdanube Pearls1 with a stronger focus on cycling and ecotourism. There are highlighted destinations, where the tourists can spend one or more night(s), during the cycling trips. These destinations can serve further programs, particularly in ecotourism, and can create memorable experiences, during which a sense of place, through the involving, interactive programs connected to the cultural landscape (e.g., wildlife watching, wine tasting, listening to the story of the locals) can be developed. The programs can be created and managed by the local destination management organization (DMO) or by any type of formal or informal cooperation of the service suppliers. The label can help this kind of management activity, however under this umbrella, all the destinations can still position themselves based on their own values.

Under positioning we mean the process of finding a unique position in the head of the guests, which differentiates the destination from its competitors. It is a long process, which can be successful, if it is based on research targeting demand as well as the supply-side and the unique values are chosen on a wide consensus, involving locals.

Based on the unique values concrete "experience promises" can be defined and, subsequently, program packages can be created. An "experience promise" can be defined as: "A purchasable visitor experience that responds to travellers' desires to venture beyond the beaten tourist paths; one which dives deeper into the destination's natural environment and/or authentic, local culture that connects with people and enriches their lives. It engages visitors in a series of memorable travel activities, revealed over time, that are inherently personal, engage the senses, and make connections on an emotional, physical, spiritual, intellectual, or social level." (CTC, 2011)

**Check-list for value-based positioning**

Output: Value-based positioning plan for the destination based on the values of the ecosystem services map. The steps of the positioning are as follows:

- ☒ Selecting the most important unique values based on an ESS-map and competitor analysis
- ☒ Segmentation – identifying segments and needs and targeting (based on value-selection)
- ☒ Finding the jointly understood vision
- ☒ Identifying experience promises assuring place attachment

1 http://www.interreg-danube.eu/approved-projects/transdanube-pearls

# 3.2 VISITOR EXPERIENCE

The main focus that should be laid to the memorable visitor experience, can be defined like this: "Experiential travel engages visitors in a series of memorable travel activities, that are inherently personal. It involves all senses, and makes connections on a physical, emotional, spiritual, social or intellectual level. It is travel designed to engage visitors with the locals, set the stage for conversations, tap the senses and celebrate what is unique in the destination" (CTC, 2011)

Based on the chosen values, and positioning, the main elements of visitor's ecotourism experience promise should be defined, particularly those ones, which can help understand and feel the values of the local nature and community (e.g. panorama points; tasting tours) resulting in the benefits discussed in Chapter 2.1. serving the well-being of locals and visitors. The focus should be laid to that kind of visitor experience which is co-created, and assure the interaction between the local nature, community and the tourists, to assure the "sense of place".

The main advantages of creating such programme packages based on this kind of experiences are as follows:

- Generation of new revenue
- Competitive advantage over those in service industries
- Lower-cost investment because these experiences do not involve capital infrastructure
- Ability to leverage the marketing budget through partnerships
- Expanding your network of suppliers and partners
- Opportunity to introduce value-based pricing and attract higher-yield customers (CTC, 2011: 14)

### 3.2.1 EXPERIENCING SENSE OF PLACE AND ITS BENEFITS

The Millennium Ecosystem Assessment (MA, 2005) defines ***sense of place*** as a relationship between people and ecosystems, which relationship representing a natural condition is indispensable for human existence. In other words, sense of place is developed by people as a result of biological, individual and sociocultural processes that take place while people experience (by interacting, knowing, perceiving, or living) the physical environment. Eco-tourists are seeking this authentic experiences with nature and culture. They want to feel the destinations unique sense of place and learn how and why it is special. Once they learn more about the place, they will be

- more willingly adhere to the behaviour required to ensure a low-impact visit and
- more likely to contribute to a destination's natural conservation and cultural preservation.

This attaches value to local resources and encourages other stakeholders, particularly the community to use its resources in a sustainable manner. By teaching visitors about the destinations settings, easy-to-use guides motivate them to be more environmentally responsible (McGahey, 2012).

### 3.2.2 PLACE RELATED PRO-ENVIRONMENTAL BEHAVIOUR

There are various ways to implement place related pro-environmental behaviour. Consider the following:

- Green Consumerism (e.g. buy local products)
- Conservation Behaviours (e.g. volunteer to stop visiting a favourite spot if it needs to recover from environmental damage)
- Activism/Advocacy (e.g. sign petitions in support of protected areas)
- Persuasive Action (e.g. talk to others about environmental issues, encourage others to reduce their waste and pick up their litter)
- Educational Behaviours (e.g. learn more about the state of the environment and how to help solve environmental problems)
- Civic Action (e.g. participate in a public meeting about managing a protected area)
- Financial Behaviours (e.g. pay increased fees, contribute money to environmental organizations, contribute donations to ensure protection of the area)

In order to support the link between a feeling of personal bonding with "EcoVelo" places and the perceived value of the visitor's experience at that place, implementation should include the following dimensions (Figure 5):

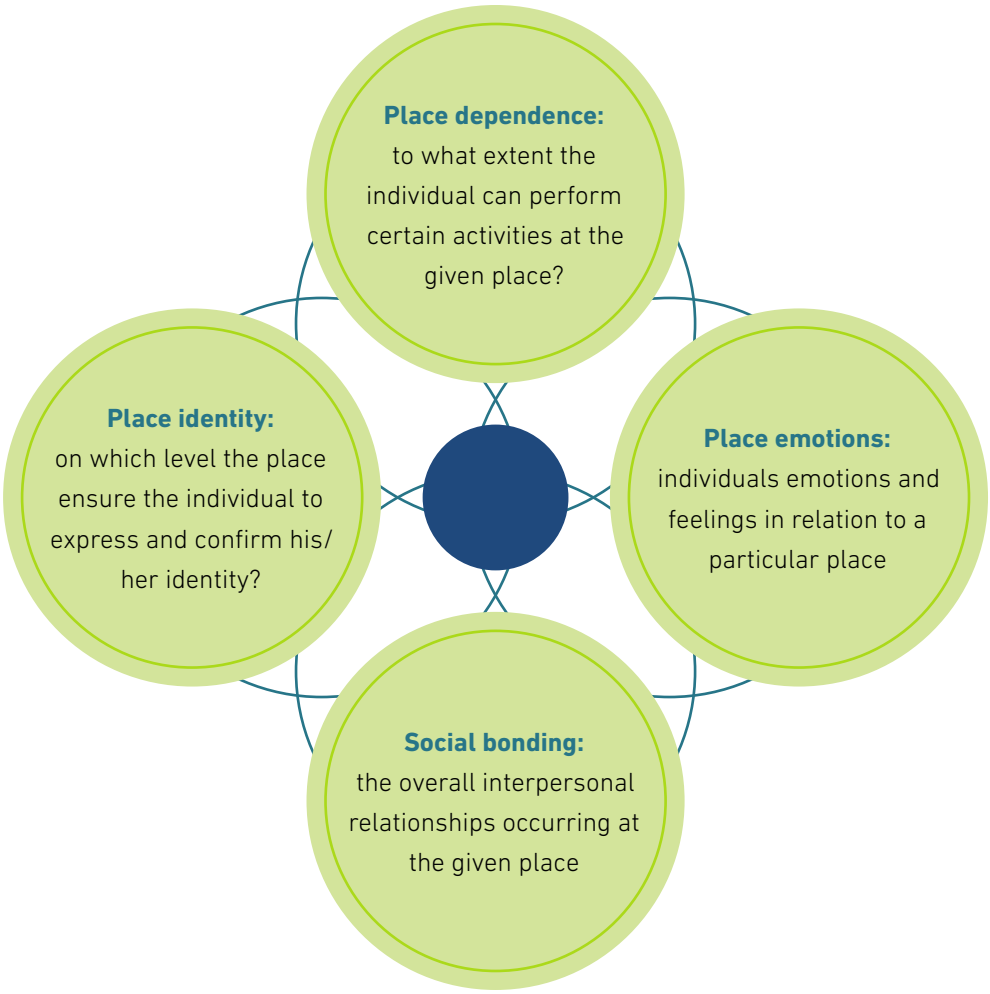


*Figure 5: The dimensions of a sense of place experience*

In the case of the "EcoVelo" memorable experience, the focus should be laid on the joy of movement, as well as the cultural landscape:

- Joy of view of the landscape at dedicated panorama points
- Learning about local values in interaction with locals (storytelling, guided tours, interpretation)
- Sense of place through experiencing local food, gastronomy and wine, as well as the chosen natural values.

**Check-list: Planning visitor experience**

Output: Mapping tourism experiences of the destination resulting in place attachment
Steps: Answering the following questions:

- ☒ What makes your community special?
- ☒ What do they do that visitors may be interested in seeing, learning about or engaging in?
- ☒ Where are some unique, less-travelled places?
- ☒ Are there any iconic people, places, celebrations, legends?
- ☒ Who are the storytellers?
- ☒ Are there any underutilized buildings, trails?
- ☒ Are there any (special) settings or facilities for activities /cycling?
  - → Any offers to increase the length of the stay in the area?
  - → Any offers to increase the number of visits?
  - → Any offers to increase the level of social interactions between locals and visitors?
- ☒ Are there any non-traditional tourism business people who could become involved with tourism, such as fishermen, farmers, golf course greens-keepers, carpenters, instrument makers, etc.?

# 3.3 PLANNING ROUTES AND PACKAGES

After planning the concrete visitors' experience, the focus can be laid on how to create the baseline of the experience, the eco-friendly bike tourism. In this perspective the spatial aspects of ecosystem services based bicycle tourism should be projected and set by a multi-scaled and multi-layered ***spatial planning process*** including different types of spatial planning and design. As the Danube corridor is the part of the protected area Pan-European Ecological Corridor, we suggest to follow a planning with care for natural amenities and values, as well as the well-being of local communities.

The first step after outlining and defining the need of a bicycle route is to carry out a landscape and urban planning process through which a spatial framework can be developed. Landscape planning processes ensures the compromise between the stakeholders, the participation of the community, the implementation of legislations, and also sustainable planning and design principles. The outcome of the landscape and urban planning will be a ***master plan***. Basic content of the master plan is the layout and spatial dimensions of the built infrastructure and the natural and man-made green spaces, the zoning of different functional areas and the regulations of different activities. A master plan is a common tool to ensure sustainability.

A framework of international and national standards and regulations have been set to protect and develop ecosystem services. The most important strategies and regulations on international level are

- EU Nature Directive for protecting biodiversity
- European Landscape Convention for protecting all natural and cultural European landscapes
- EU Water Framework Directive 2018 to reach a better environmental state of water bodies
- IUCN's Nature Based Solutions strategy and standards for implementing sustainable techniques in construction
- Pan-European Ecological Network Strategy is for a better connectivity of natural habitats

On a national level, regulations of spatial planning could provide a basis for a legal framework.

## 3.3.1 PLANNING GREENWAYS

A greenway is a landscape strategy which can support the development of a cycle route and could also include all the facilities needed for a complex landscape service. Basically, a linear landscape feature performing all kinds of landscape characters based on natural, social and economic conditions.

### Methods for sustainable greenway planning are:

- ***Sectioning.*** Based upon landscape conditions (natural environment, major land uses, spatial data, functions, flow, densities, dynamics, junctions, social and landscape patterns, etc.) *longitudinal spatial sections* can be defined along the greenway. Each section has its own character and also its priorities for development, as well as a defined toolkit, for implementation and management. Along the greenway, several such sections could be outlined, like natural sections or urban sections, etc. *Transversal spatial sections* can also be differentiated which shows the interconnectivity of the greenway with the landscape network: existing and future nets of urban green or alternative traffic other ecological sites or sites worth to visit, etc. Such sections can be varying in a wide range and can give a significant input for development and management zones.
- ***Zoning.*** Based upon basic function and land use, different zones could be defined in order to protect natural and cultural resources and develop the required functions.
- ***Layering***. Each landscape is multifunctional. If we take only one of its functions rather than list and draw all the places and facilities of the function chosen, one can come up with a *thematic layer* of the greenway. Low impact cycling tourism is only one out of a dozen (even more!) thematic layers of a greenway. To ensure a long-term success each layer should be worked out and contrasted with each other before finalising the master plan. Certain land-use conflicts, such as tourism versus nature protection, could be sorted out by a sensitive thematic layering, defining different zones for each priority while ensuring connectivity in each thematic layer. Such layers can partially overlap which indicates a density in functions and outline present and future hubs or junctions.

As a result of mixing the methods above, facilities serving different functions could be well-placed and well-managed in a spatial manner, defining each zone by an exact position and size, fitting the best into landscape.

The most favourable land uses are elements of the ***public open space network***, such as public forests, planted promenades, waterscapes, public parks, nature reserves, public traffic ways, etc. The ***majority of open spaces*** and the core of a greenway such as the cycle route must be public and ***freely accessible*** at all times for all. A minority of the sites could have ***restricted use*** - restricted in time (opening hours, etc.), monetary restrictions (entrance fee), restrictions according to users (playground for children age 3 to 6) or a combination of monetary and user restriction (sport clubs). The main function of the greenway is serving daily alternative mobility, daily and weekly recreation and tourism.

### 3.3.2 DEFINING LANDSCAPE VALUES

First of all, it is essential to analyse the landscape basis of the greenway which provides the framework for eco-tourism. The **natural conditions** set a basis for the landscape. Geographical position, topography and geology as well as the existence of surface water could give importance of the site. The past and present **land uses** reflect the social cohesion of the inhabitants and reflect to place attachment. Existing **infrastructure** could support as well eco-tourism development as providing a technical supply. Unique **built heritage** could add to the **list of attractions.** Social structure, population and inhabitants could form tourism services. Landscape character and **unique landscape** features are emblematic eye-catchers, attractions and provide a basis to form packages and create variable routes. The quantity and quality of **natural habitats** and **protected species** are among the best attractions and also indicators for monitoring changes.

A landscape analysis and evaluation could sum up the values (natural and artificial features, panoramas, facilities and services, etc.) for ecotourism. The method of SWOT analysis can be used in landscape planning, especially to deal with ecological sensibility and carrying capacity. Besides the values landscape conflicts as risks should be detected and involved in the development process of the project.

### 3.3.3 DEFINING THE LAYOUT OF THE CYCLEWAY AND THE HUBS

Defining the final scenario for the layout of the cycleway is one of the key elements to adjust the project to the carrying capacity of the site and to minimise ecological damage. By diverting the route from valuable habitats, risk of disturbance and ecosystem services loss could be prevented. A good layout could serve all user groups and all projected functions in a way values could be preserved but experienced. Key target is to define the frequency, the position and hierarchy of the multi-functional hubs along the route which could host also services for tourism. Best hubs serve various purposes and provide combined services for different user groups.

### 3.3.4 DEFINING SERVICES

The thematic layers could serve as a spatial basis of different services for different target groups by which ***spatial scenarios of ecotourism services*** could be developed (e.g. Veszprémi Séd Green Corridor, Hungary[2]). EuroVelo tourists use a different spatial network and facilities than local families cycling as a weekend recreation. Speed of travel, target areas, facilities needed, and distance travelled can differ. Sites and institutions of cultural heritage, nature reserves, green sports and gastronomy are frequently included and interconnected.

Harmonizing tourism with everyday and weekend recreational use of the locals, hubs and ***multipurpose facilities*** serving all could be more sustainable ***in hubs*** defined by the master plan. In some sections, separate routes could serve better the cycle tourism for reducing land-use conflicts. In some other sections, combined routes and multi-purpose facilities could serve better sustainability.

2 https://zoldkalauz.hu/veszprem-sed-volgy

### 3.3.5 DEFINING SPATIAL ZONES

Based upon the methods of spatial planning, a master plan of the greenway should be developed in order to protect and increase ecosystem services provision in the long term. Therefore, the method of spatial zoning is implemented to spatially separate different intensities of tourism. One of the best practices is the spatial zoning of National Parks defined by IUCN (zone A, B, C). Zone A is for pure nature conservation, no action. Zone B is for creating a buffer between the natural sanctuary and the active zones. Zone C is for low impact tourism, leisure and environmental education. **Ecological vulnerability and carrying capacity** of certain sites can be a key principle to set up restrictions. Although a site has high potential in ecotourism (such as wetlands along creeks or an old watermill with a mill channel) carrying capacity must be taken into consideration before facilities are built and visitors are led let in. Vulnerability and carrying capacity issues can result in spatial restrictions and special design answers. (See more in Chapter 4.3.)

The zoning of EECONET (by IUCN; European Ecological Network; core area, buffer, corridors, stepping stones, rehabilitation areas) could also serve as a relevant model to be able to connect valuable places and to separate non-supportive functions. Based upon the zoning standards of international nature conservation and landscape protection for the greenway the following zones could be proposed:

- ***Zones for protection*** – ecological sanctuaries – priority is nature protection – no access; management actions only for maintaining the values
- ***Zones for buffering*** – limited numbers of visitors combined with landscape management for protection or production
- ***Zones for tourism and leisure*** – active zones for visitors and locals for recreation, facilities and services
- ***Zones for restoration*** - loss of ESS, needs to be restored, target area for environmental awareness actions and education, facilities and services

### 3.3.6 MANAGEMENT PROTOCOL AND VISITOR'S GUIDE

For each zone separate management protocols must be worked out and executed in order to maintain sustainable cycle tourism.

- **Guidelines and regulations for management**. Basics of management should be set by a **management plan.** A management plan provides a frame of resources and tasks, defines the spatial relevance and also timing. The management plan should be supported by a manual which details the management aspects of protecting and developing ESS.
- **Monitoring**. Indicators of ESS could be defined to be able to detect trends and changes and to adjust management plans. Monitoring could be an activity of a cross-sectoral collaboration and also an opportunity to involve visitors.
- **Feedback and adjustment.** Based on the results of the regular monitoring actions, the management team could adjust management actions to serve better the protection of ESS and higher performance ecotourism.

After creating a master plan for open space design, tools are implemented to detail the project technical and spatial factors (See detailed in Chapter 4.3.)

**Check-list for planning routes and packages**

Output: Develop packages and create a spatial plan to the scenarios of EcoVeloTour Routes

- ☒ Define the potential user groups
- ☒ Define the landscape values of the potential sites
- ☒ Assess ecological vulnerability and carrying capacity of the projected sites and develop a SWOT analysis
- ☒ Detect the legal and planning environment of the potential site
- ☒ Choose the most relevant spatial planning tool (zoning, sectioning, etc.) to create a sustainable master plan to define spatial structures and hierarchy of functions
- ☒ Define and detail the functioning of hubs and also the routes

# 3.4 SOURCES OF FUNDING

Source of funding and regulations for management should be based on a cross-sectoral partnership in which each stakeholder could input their competencies. Development of ecosystem services (ESS) must be a shared task – in which public sector, private sector as well as NGOs and visitors can take a role. A typical role of the public (municipal/state level) sector is to provide basic facilities (management framework for natural sanctuary zones, ranger service for nature protection as well as tourism, gestoring restoration projects, administration, database management, etc.) financed by public budget. Worldwide nature protection issues are labelled to public sector or NGOs. As most of nature protection acts serve a long term and mainly indirect benefit for the society, to be calculated by ESS, public sector is the right partner to be able to ensure these long-term goals and coordinate joint actions.

The non-profit cultural sector could be motivated by several fundraising and awareness raising activities. One of the common tools is to manage so-called adoption programs in which any kind of infrastructural element or natural habitats could be adopted and its development and management is co-financed.

Private sector could be engaged by incentive tools realizing direct profit. A common tool is local tax reduction for those private partners who could serve the same long-term goals and give an ESS-based service or construction. Another common tool is the urban/rural development contracts in which public and private partners set the administrative and financial basis for an ESS-based project. Most common tasks of such contracts are public infrastructure (drainage system, sewage, road, public parking or public greening, etc.) network developments in which the project is partially financed by a private partner for a direct profit such as easier accessibility, better connection, better service. In this case, the benefit gained (e.g. more visitors, more reliable service) by the new development could be calculated. Visitors could take a key role in financing ESS. Tools are varying from the most common issue as pay a direct fee or donation for an ESS to a participatory voluntary action reducing costs of maintenance.

## 3.4.1 REVENUE GENERATION MECHANISMS

A number of mechanisms exist to generate tourism revenues for conservation. In general, revenue produced by ecotourism activities can be described by the following categories (WWF, 2004):

**Fees** can be self-assessed or imposed on others (e.g. entry fee, departure fee, user fee). While fees are a useful stream of revenue, they are often insufficient to cover the full costs of a program. Additionally, by using fees expectations can be raised which might be difficult to be realized due to other protected areas within the same region or inefficient marketing. The types of fees used in tourism are described as follows:

- Entry fees: fees charged to visit for entrance and access to a protected area. Price advantage of entrance fees can be based on not only visitor type (locals or tourists; demographic characteristic, etc.) but also on levels of visitation. There are three principal considerations in determining entrance fee levels: willingness to pay for access to the area by the visitor; comparison of fees charged at other similar sites in similar circumstances; coverage costs associated with provision and maintenance of recreational opportunities (Drumm-Moore, 2002).
- User fees: fees charged to visitors for experiencing specified activities or for use of specified facilities within the protected area
- Admission fees: collected for fees charged to use of a special activity or facility

**Case on entry fees:** "Belize has been collecting a "Conservation Fee" of $3.75 per person since 1996 in combination with a departure tax. Visitors departing the country by plane, vessel or vehicle are charged an $11.25 departure tax as well as the Conservation Fee of $3.75 for a total of $15.00. The revenues from the Conservation Fee are a primary funding source for the Belize Protected Area Conservation Trust (PACT), which is an independent legal entity outside of the government. The incomes generated by the Conservation Fee are invested back into the Protected Areas and communities through PACT's Grant Programs." (UNDP, 2012, p. 32.)

**Case on user fees:** "To answer increasing use of facilities in Dominica, a user fee was introduced at several major attractions in 1997. The money generated has gone to pay for site-hardening initiatives such as improved paths and viewing-platforms. " (WWF, 2004, p.44)
**Case on pricing:** "In Ontario Provincial Parks, Canada fee increases of over 40% resulted in a substantial increase in visitor numbers due to investment in better recreational services." (WWF, 2004, p. 41)

**Taxes** constitute a further tool for financing protected areas**.** These may take the form of national taxes levied on all visitors to the country or on users of particular tourism services or products, local taxes levied on users of the protected area or on the use of equipment. They usually required large-scale, national-level implementation. The advantages of using the tax system include the ability to generate funds nationally (or regionally) on a long-term basis and the freedom to use this funds to suit a variety of needs priority (WWF, 2004).

A **public green fund** similar to other public environmental funds working on micro-regional or municipal level could serve as a sufficient financial basis for protecting, developing, maintaining and restoring ESS along the cycle way. The income side of the fund is generated by a so-called green tax paid by all the businesses and locals taking advantage of the greenway; other local environmental taxes and environmental fines (paid by businesses endangering ESS in the catchment zone). From the green fund regular management could be financed and partially could give a support for projects restoring/maintaining/developing ESS.

**Case on tourism taxes:** Bed levies are a commonly used form around the world, and it is an effective form when the area is within one protected area. For example, in the USA, the state of Delaware imposes an 8% charge on room prices of which 10% goes to finance beach conservation (WWF, 2004).

**Case on green fees:** Departure tax add-on: "In Palau departure tax add-on, called "Green Fee," was implemented. The Green Fee is part of the $35 departure tax paid by foreign visitors when leaving the country. Revenues are paid into a national account managed by the Protected Area Network Fund (PANF) board of directors. Approximately $1.3 million in Green Fees was collected in the first nine months of implementation. These funds are used to support the management plans for Palau's 23 marine and land based Protected Areas. The implementation of Green Fee took six years." (UNDP, 2012, p. 36)

**Case on road tolls**: "A road toll of $3 is charged to all motorists on a scenic highway known as 'Alligator Alley', in Florida, where there is a good chance of spotting alligators while driving along. This toll raises $60 million each year, which goes to conservation of the Everglades ecosystem." (WWF, 2004, p. 47)

**Concessions and leases** can be another way to generate revenue for conservation areas through tourism**.** This means a range of licences, permits and leases. These forms allow private companies or individuals to run commercial operations within a protected area while generating financial benefits for the protected area. Activities may include, for example, tour guiding, accommodation provision, restaurants, souvenir shops and the hire or sale of sport and recreational equipment. A concession or lease may consist of a set of fees paid to the protected area authority over an agreed length of time or the amount may relate to the income of the concessionaire, or a mix of these.

**Adoption program** is common tool for raising awareness and co-financing activities.  Adoptive parent organizations, firms or citizens could adopt any built or unbuilt element (e.g. a valuable habitat or an information board, a rest area, etc.)  and by particular activities this new stakeholder could promote and also finance the development. These cross-sectoral co-operations on sharing tasks and costs are very common worldwide and are often coordinated by an NGO.

**Volunteers involvement** in the operation of protected areas through providing guiding and interpretation services, fund-raising or through staffing key services can be also a way of financing. However, this is likely to work in countries where people have considerable disposable time and relatively high income. Parallel with this, **donations** by tourists who have been to the area, or have some interest in it, and private companies ready to demonstrate their Corporate Social Responsibility (CSR) activity can be an additional scheme. There are many ways how these schemes can operate, for example:

**Case on donation: "**Saba Marine Park runs a successful 'Friends of Saba Conservation Foundation' scheme. Donations are generated through a 'Friends of the Saba Marine Park' promotion that encourages park visitors to register, give donations, and receive information. Subscriptions start at $25/year (Friend) to $5000/year (Patron)." (WWF, 2004, p.47)

**Case on donation: "**Alaska Wilderness Recreation and Tourism run a 'dollar a day' programme. When they send the invoice to their clients they give the client the opportunity of adding a donation of a dollar for each day spent in Alaska which goes to a conservation fund." (WWF, 2004, p.47)

**Market-based mechanisms (MBM) and payment for ecosystem services (PES)** constitute another option to finance protected areas**.** MBMs are generally large-scale, voluntary or involuntary, with potential for long-term financial sustainability (UNDP, 2012). Implementing a MBM is challenging, due to the vulnerability of MBM' revenue flows to global trends and interests.

**Case on carbon credits as MBM: "**The Sierra Gorda Biosphere Reserve is a protected area that has been able to match a variety of financial tools to the needs of a Reserve, where 97% of the area is comprised of small land parcels, owned by 95,000 impoverished inhabitants. Efforts to enter the regulatory carbon market, as a Kyoto Clean Development Mechanism (CDM) project, were abandoned after eight years of work. The knowledge and technical expertise built during the CDM efforts were instrumental in the creation of a voluntary carbon market offset offering which resulted in $399,235 in revenue The voluntary carbon market initiatives supplement the existing PES and land purchases projects, where individual landowners sign contracts to rent their parcels of threatened forest in exchange for activities that regenerate the forest, protect the watershed, capture carbon, plant native trees and generate income. The implementation of the PES and the carbon market offset projects provided technical expertise, efficiencies for overlapping project and administrative functions and success metrics that can position Sierra Gorda Biosphere Reserve to take advantage of REDD+ (Reducing Emissions from Deforestation and Forest Degradation) or other climate related tools/initiatives and help fund other social and conservation initiatives" (UNDP, 2012, p. 46).

In contrast, PES transactions based on behaviour change at the individual level that maximizes environmental protection. PES schemes, if appropriately contextualised and designed in a participatory way, tend to be more pro-poor than global market-based mechanisms (UNDP, 2012).

**Payment for Ecosystem Services (PES)** concept is based on the dilemma that many services and benefits that humans derive from nature are taken for granted; these environmental services are therefore not sufficiently represented in societal and economic valuations. As a solution, PES schemes aim to internalize the costs and benefits of supplying the services (TEEB 2010).

Wunder (2005) defined PES by means of five fundamental criteria:

- a voluntary transaction where
- a well-defined ecosystem service or a land-use likely to secure that service
- is bought by an ecosystem service buyer
- from an ecosystem service provider
- if the ecosystem service provider secures ecosystem service provision.

Regarding coordination and financing, PES can be public, private, or donor-led schemes (ILO, 2018):

- **Public payment schemes** are financed and managed by the state, usually through general taxes. They are most times large, nationwide programmes and tend to include side objectives. The government takes over the role of the buyer and buys ESS on behalf of the public. This is often the case in newly established PES schemes in order to secure financing for the initial phase with aims to pass on the buyer-role to private sector companies later.
- **Private payment schemes** are user financed types, whereby the users (e.g. tourism companies, municipalities, private households) pay for the service directly. These schemes tend to be smaller, focusing on a local area. Users and buyers of ESS pay providers and sellers of the services directly.
- **Donor-led schemes** are encouraged and financed by international donors. They tend to support local, small-scale projects, often within larger initiatives covering more than one country.

PES schemes can be developed at a range of spatial scales, including international, national, catchment and local. Four principal groups are typically involved in it (Figure 6):

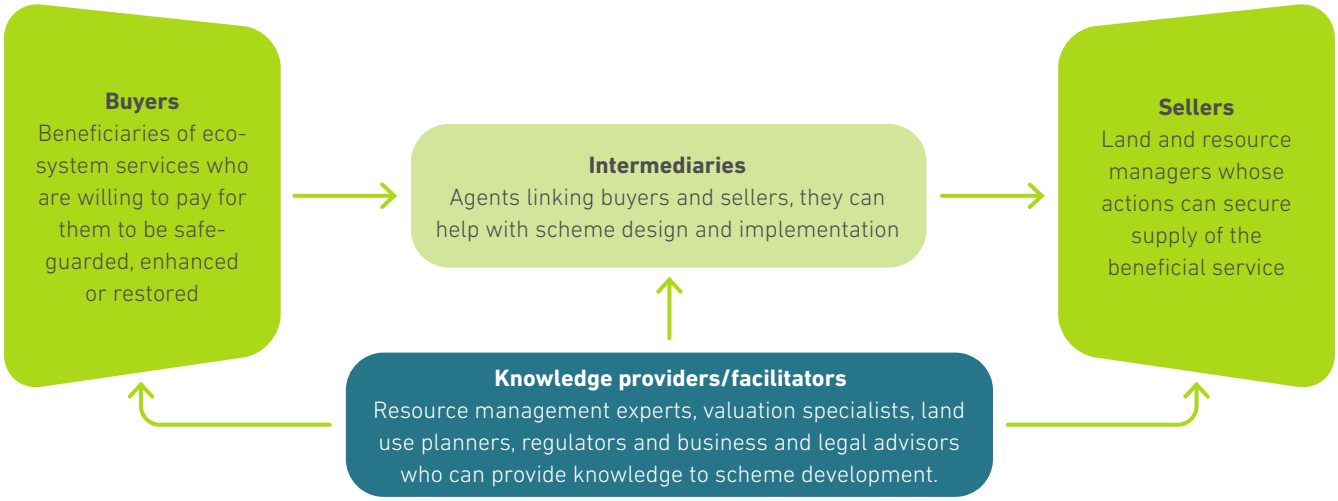


*Figure 6: Typical actors in a PES scheme*

The type and amount of payment that is necessary for provider to adopt the necessary land use changes is referred to as the **willingness to accept (WTA)** the required land use change. Moreover, the PES literature emphasizes the assessment of the beneficiary's **willingness to pay (WTP**) for the provision of ESS. In terms of tourism-related PES, a distinction should be made between the WTP of commercial entities and WTP of individual tourists (DeGroot, 2011). For a PES scheme to work, it must represent an advantage for both buyers and sellers.

The way that buyers and sellers can be configured in scheme development can also vary from **one-to-one** to **one-to-many** or **many-to-one** and **many-to-many**.

Based on the mode of scheme, a distinction can be drawn between output-based and input-based payments (DEFRA, 2013):

- **Output-based payments** are made on the basis of actual ecosystem services provided.
- **Input-based payments** are made on the basis of certain land or resource management practices being implemented.

A PES scheme can focus on more than one ecosystem service. In this case, services being sold are described as having been 'packaged', which can be realized in three distinct ways:

- **Bundling**: a strategy whereby a single buyer, or a consortium of buyers, pays for the full package of ESS that arise from the same parcel of land or body of water. For example, water quality, biodiversity and visitor benefits could be bundled together in a single scheme involving payment for peatland restoration.
- **Layering/stacking**: multiple buyers pay separately for the ESS that are supplied by a single parcel of land or body of water. For example, visitors to the area paying for the cultural benefits through a visitor payback scheme while a wildlife NGO paying for the biodiversity.
- **Piggy-backing**: a single service or several services is/are sold as an umbrella service, whilst the benefits provided by other co-generated services accrue to users free of charge. For example, in the case of a peatland restoration scheme, identifying a buyer for the reduction in wildfire risk may be challenging and this service may suffer from 'free-riding'.

**Case on PES:** A PES community-based ecotourism program was started in a village of 236 families located within Cambodia's Kulen Promtep Wildlife Sanctuary. A multi-step process resulted in legal approval of tourism agreements, local land rights, and law enforcement capabilities for the village. The agreement between the protected area authorities, World Conservation Society (WCS) and the village stipulates that tourism revenue is subject to the village's agreement to stop hunting key species and follow the land use plan. The PES program links tourism revenues to long-term species and habitat conservation. In one year threatened bird populations improved, $4,300 in tourist bird sighting fees went to the village fund, and 10 percent of villagers were employed part time in ecotourism services (UNDP, 2012).

**Case on PES as private payment schemes:** As a part of the WWF DCPO (Danube-Carpathian Programme Office) project entitled "Promoting PES and other related sustainable financing schemes in the Danube river basin", two tourism-related pilot PES schemes were introduced to provide benefits to nature and local people alike. One of them was in *Oas Gutai plateau* (Romania) and targeted landscape degradation. The aim of the PES scheme was to raise awareness and to channel financial support from local guesthouses and tourism operators into local conservation. The other tourism related pilot was located in Rusenski Lom Nature Park (Bulgaria) and featured the introduction of payments for cultural ecosystem services to generate income from tourism users of the park. Rusenski Lom River is the last major tributary of the Danube in Bulgaria, before it flows into the Black Sea. The area comprises a natural complex of ecological, historical and cultural significance. It generates income for 35,000 people living on agriculture, forestry and tourism. Payments for cultural ecosystem services were introduced in Rusenski Lom as a win-win solution to businesses and nature. The instrument contributes to generating income from tourism users of the park, which would be invested entirely in enhancing the values of the area for these users. The measures to be implemented include development and maintenance of low-impact biodiversity trails, restoration and management of the habitats and protection of key animal species of global conservation importance and of cultural values. Therefore, attracting tourists to the area will be protected, which will ensure both the livelihood of local tourism businesses, and of small-scale farmers, bee-keepers, aquaculture managers, who supply their products in tourism places. The form of the payment was chosen on a voluntary basis by the buyer as follows:

- Promotion of information- tourists and visitors, in their capacity of buyers are able to purchase materials developed under the PES scheme. These are four types of post cards, specifying the conditions for the payment provided by buyers.
- Sale of tourist services or package including an add-up over the standard price to be collected and used for the purposes of the scheme. The level of add-up could be chosen by the buyer but it ranges between 1 and 5%.
- Donations to the funds to be spent entirely on maintenance and protection of ecosystem services. (WWF, 2004).

Overall, considering the time and money invested, PES and MBM have been slow to achieve anticipated revenue levels. Fees, such as entry fees and departure taxes, hold out the biggest opportunity for increased revenue with minimal associated costs.

### Check-list for source of funding

**Step 1:** Identify saleable ecosystem service(s)
Collecting information

- ☒ about high biodiversity value sites
- ☒ on specific characteristics of the largest or most important land-uses in the study area
- ☒ on typical and also the unique landscape features in the study area
- ☒ on specific trends in land-use in the study area

**Step 2:** Identify the prospective sellers and buyers

- ☒ Are beneficiaries experiencing problems with the supply of ESS? If yes, they will most likely to consider entering into a PES agreement
- ☒ Is the demand for the service being offered for sale clear? Its provision must be financially valuable to buyer(s), so there's a willingness to pay to secure it.
- ☒ Is/are the buyer(s) in a position to at least cover the opportunity costs incurred by the seller(s) in providing the service?

**Step 3:** Establish PES scheme principles

- ☒ Are PES schemes tailored to suit the regional or local requirements?
- ☒ Are PES schemes adaptable to different seasonal, spatial, cultural, legal, technical and economic situations?
- ☒ Are the objectives of PES schemes measurable and clear?
- ☒ Are the required activities realistic to the level of payment?
- ☒ Is the possibility of potential trade-offs between different services carefully considered?
- ☒ Is PES attractive from a buyer's perspective if the payments are less than those associated with any alternative means of securing the desired service.
- ☒ Land purchase or long-term lease of land as a part of the PES schemes should be considered. This could be improved by establishing a public financing mechanism for land purchase or a long-term land lease from state or local authorities could be developed.

- ☒ Field surveys and data gathering are necessary to support the design of PES.
- ☒ Developing several parallel PES schemes or supporting the establishment of public funded PES schemes by other market based instruments (e.g. tax, donation) should be considered.
- ☒ Training and advisory services should be part of the PES schemes
- ☒ Main activities considered to be supported by the PES include sustainable farming practices and sustainable tourism.

**Step 4:** Determine institutional and administrative functions

- ☒ appropriate governance framework,
- ☒ financing platform,
- ☒ (if possible) national legal framework for the PES schemes should be designed and implemented.

**Step 5:** Negotiate and implement agreements

- ☒ Is a wider stakeholder involvement in implementation and monitoring of the schemes considered?
- ☒ To guarantee the long term funding of PES schemes adequate resources should be allocated to locating new sources for funding
- ☒ Are diverse sources for financing implemented? A number of required investments for ecotourism and capacity building activities could be financed through the support available for regional development.

**Step 6:** Set requirements for measuring, reporting and verification

- ☒ Are the methods for appropriate monitoring and evaluation of PES well designed?
- ☒ Monitoring and evaluation should provide information on the relevance, effectiveness and efficiency of PES schemes
- ☒ Periodical revisions of PES may be required

# 4. Implementation and monitoring

## 4.1 METHODS FOR STAKEHOLDER ENGAGEMENT, EDUCATION & AWARENESS RAISING

The ecotourism strategy proposed here, considers the „sense of place" as a co-created visitor experience. Physical environment, culture and nature but also locals, guides, people working in the hospitality industry or in bike rental are all creating this experience together with the tourists. That's why the importance of planning and implementing ecotourism development involving all stakeholders is of huge significance.

Regarding to the ecotourism project, the most efficient methods have to be chosen in order to activate our stakeholders. Every single project has its own characteristic, so there is not any universally best method to be copied and followed.

It is necessary to consider that different stakeholders require different communication forms and phrasing. If the project is implemented in a densely populated area, it can happen that the "community" means several community groups with diverse interests, wishes and opportunities but it is also possible that there are only a few people affected.

A kick-off event should be organised to inform relevant stakeholders about the project. To reach the wider community, public fora can be organised. For smaller community groups and specific stakeholders, 'theme-based workshops could mean the best way for collecting ideas, impacts and best practices.

In urban areas with many residents, surveys can be a good solution to examine the characteristics and interests of diverse community groups but to explore special interests and attitudes focus groups or interviews can be undertaken. It is worthwhile to use professional help to choose and apply the best methods.

The aim of the involvement is not the acceptance of the planned project but to create the main focus from all knowledge and values. Educational activities should aim to ensure a widespread and meaningful participation of relevant stakeholders with a focus on the goals of the project. Education of stakeholders (e.g. government institutes, residents, community organizations, businesses, etc.) could be realized when all of them have an opportunity to participate in the development of the whole project.

The key areas of education are to understand the designated area, the community, the stakeholders themselves and the key messages. The success of education is determined by the effectiveness of the information designing and sharing strategy, following with a communication strategy. The successful implementation is derived from the cooperation of stakeholders, based on their understanding and acceptance of the project and its given objectives.

To build awareness, stakeholders must be mobilized to take part in the project. Community awareness is essential for maintaining public or community support. Awareness building and education activities should target all communities and relevant stakeholder groups within the project. Valuable insights from project activities (e.g. learning interactions) should be added in order to form the educational guidelines.

# 4.2 REGULATION

Main goal of regulation is to promote services and also control impacts based upon the carrying capacity of the site and the infrastructure in order to maintain ESS in the long term. To achieve a long-term protection and development of ESS international, national, local and on-site regulatory action should be implemented. As ESS has basis in many fields sectoral regulation and strategies are diverse and specific.

## 4.2.1 INTERNATIONAL REGULATIONS AND POLICIES

Though many sectors have interest in ESS regulations, the most relevant sectors are environmental protection and nature conservation. On international level, **IUCN**'s guidelines provide a basis to national legislation besides many others on environmental issues in general (IUCN Environmental Law Programme, ELP) and also specific to protected areas (IUCN Guidelines for Protected Areas Legislation, 2011). The high majority of potential sites of the "EcoVeloTour" landscape are protected as a linear ecological/green corridor. The minority of spots could be natural treasures. While an "EcoVeloTour" site is basically longitudinal, the *IUCN's Guidelines, a Concept Paper on the Legal Aspects of Connectivity Conservation* (2013) gives a more specific basis for ESS protection (legislation, management) issues in a linear landscape.

On European level, the **EU Biodiversity Strategy** sets the framework in order to stop the loss of biodiversity. Based on the pillars of the European document, national strategies as well as policies and guidelines were/are developed to identify and map ecosystem services and also the indicators to monitor changes (e.g. Hungarian National Ecosystem Service Mapping and Evaluation 2020[3]). These documents identify small watercourse valleys as significant landscape features of European wetland habitats, general low environmental quality, sensitive to changes, endangered by human activities (especially building) and have high potential for habitat restoration and human recreation.

The **European Water Framework Directive** (WFD) is also a document that sets the importance of the network of small watercourses as the core of freshwater sources of the continent, with an importance at mainly local or micro-regional level. The goal of the WFD is to enhance the quality of freshwater sources as well as water and wetland habitats.

## 4.2.2 NATIONAL REGULATIONS AND POLICIES

On national level, sectoral law acts and strategies, such as **nature protection act and national biodiversity strategies[4]**, set the strongest legal framework to protect ESS in general. Different sectoral strategies such as viticulture, sylviculture, agriculture, water management, tourism, regional development, urban development or blue and green infrastructure could also integrate some particular aspects of ESS.

The goals of international and national directives are to

- Identify (typify, map, describe and catalogue) the landscape values
- Identify the potential for joint land uses
- Protect and maintain the value and the potential of landscapes
- Lower the risk of danger to landscapes of high natural and cultural values

3 http://www.termeszetvedelem.hu/okoszisztema-szolgaltatasok-fejlesztesi-elem

4 Hungarian National Biodiversity Strategy http://www.termeszetvedelem.hu/nemzeti-biodiverzitas-strategia

### 4.2.3 REGIONAL REGULATION AND POLICIES

"EcoVelo" projects are more likely to be developed on a regional level which is the right scale of an "EcoVeloTour" program. Therefore, the most relevant scale to develop and implement regulations and policies on ESS is to define them on a regional scale. To start the development of the project, a framework for cooperation of regional stakeholders should be set. Based upon the cooperation contract, regional policies, tourism development strategies and regional spatial plans as legacies for development could be worked out.

### 4.2.4 LOCAL LEVEL

Actions of programmes, protection, maintenance and monitoring takes place on a local level. Municipal strategies and master plans are essential to serve ecotourism on-site. A relevant local master plan and zoning plan creates a suitable site and can protect it from other land uses and other disturbing functions. Local policies for development could well balance with policies for protection and maintenance of ESS.

### 4.2.5 PROJECT OR SITE LEVEL

As well as the financial background, the regulatory framework also could be based upon a cross-sectoral partnership in which each sector has its own role. On a project level, cross-sectoral regulations would serve the highest efficiency: The public sector should

- control and regulate activities based upon ESS
- create bases and run programs for development of ESS
- maintain sites, facilities and programs.

Project managers work on a management plan and a series of action plans which could provide a basis for their activities.

For the visitors, regular guides would help to keep sustainability in mind. All regulations connected to activities and facilities of tourism could be summarized in a User's Guide. Such guides could outline the most emblematic rules of sustainable tourism.

**Check-list for regulation**

Output: Develop a legal framework and a relevant policy to maintain ESS based "EcoVelo" Tourism.

- ☒ Detect and analyse the international and national regulations
- ☒ Work out and issue a policy and also a local legal framework for sustainable "EcoVelo" tourism
- ☒ Work out and issue a User's Guide and display it!

## 4.3 CREATING TOURISM PRODUCT PACKAGES

The "EcoVelo" packages are complex, nature and culture based service packages with the following characteristics:

- Low impact, small scale: planned and implemented through local control and there is a high focus on green technologies.
- Edutainment: there is a strong need for educating visitors and locals in an entertaining way, through environmental education, workshops or visitor management
- Support the local community and conservation (direct and indirect)
- Segmented: well-defined slow experience with natural and cultural values; ensuring stakeholder engagement.

**The packages can contain the following:**

#### 1. ATTRACTION

The main attraction is the activity: cycling tour in a destination of different types with the focus of the need of the segment (e.g. segmentation based on demography, activity, interest). During the trip, in each destination, the visitor can participate in further community-based activities attached to the landscape.

In the case of an "EcoVelo" project high emphasis could be laid on the interpretation so as to be able to broadcast the experience resulting place attachment as follows:

**A)** For one-way communication, self-guided tours on the cycling path or at further points of interest out of the main path

- Paths (hiking /biking paths showing the typical landscape of the destination, e.g. Alpine meadows)
- Panorama points (Photo points)
- Display boards (for education, and edutainment broadcasting interesting facts about the nature, culture)
- Audio-visual devices (mobile application with virtual reality or gamification)

**B)** Active methods ensuring two-way communication with involvement, and ensuring the sense of place, particularly out of the biking path

- gastronomy and tasting tours
- thematic tours showing the highlighted attractions of the landscape (with involving locals, through storytelling)
- guaranteed programs (periodic programs organized by the local management entity which are run without minimal limit of participants on the promoted dates)
- nature-based activities (wildlife watching)
- edutainment: interactive environmental education programs (e.g. games, workshops, guided tours, handcraft workshops)

### 2. AVAILABILITY

The focus is on the sustainable transportation in the destination from the cycling path to the attractions detailed above (and back) and to the service suppliers (accommodations, restaurants, national parks, etc.)

In an optimal case, possessing cycling paths so as to reach all the service suppliers would be optimal, however, further transport means could come into consideration like public transport, electronic transfer buses or hiking trails. (The usage of these community or public transport services can be included to the concrete travel package sold by the destination organization or the hotel, the guide, or in case, into destination card offers.)

### 3. AMENITIES

Under amenities we understand particularly the accommodations and food and beverage suppliers (restaurants, wineries, bistros, street food).

- In the case of accommodation, there could be a strong need for those ones specialized in serving cyclist and offering services. Infrastructure for drying clothes and a safe place for the storage of bikes could be the basic requirements, while further ones can be identified from the Quality Scheme called *Cyclist Welcome* of Visit Britain or the one of ADFC (2018) called *Bett und Bike* (Annex 2)
- Food and beverage suppliers could focus on the special needs of cyclist (e.g. pre-ordering food packages for take-away) and ensuring local flavours.

### 4. SUPPORTING SERVICES

There is a need for basic services in the destination (the basic infrastructure like banks, hospitals, public cleaning and maintenance companies). Particularly in the case of an emergency there is a strong need for help: in the tour package or the package offer of the destination, public or private health care assistance can be included as well as bike repair services.

**Check-list for creating tourism product packages**

Output. Product development plan for "EcoVelo" products
Steps:

- ☒ Build on your community!
- ☒ Check what kind of local products already exist!
- ☒ Make workshops and other events to educate your community and gather ideas about the development!
- ☒ Select ideas!
- ☒ Create working groups for each topic! (e.g. one for gastronomy, another for guided tours, etc.)
- ☒ Plan the experience with answering the following questions
- ☒ How to engage the visitors?
- ☒ Everybody learns in a different way
- ☒ Is it one activity or a process of activities?
- ☒ How does the experience evolve?
- ☒ How will the experience engage the senses?
- ☒ Consider optimal group size!
- ☒ How will you make this experience memorable?
- ☒ Souvenir? Not to produce garbage, only sustainable, local products!
- ☒ Sustainability? Where is the limit of the capacity?
- ☒ Self-development?
- ☒ What kind of permissions are needed?
- ☒ Make business plans, schedules and an implementation plan!
- ☒ Search for funding!
- ☒ Start the implementation!

# 4.4 QUALITY AND RESOURCES OF THE BUILT ENVIRONMENT

The greenway embedded cycle way is a significant green infrastructure consisting of varying man-made as well as natural-like built or non-built elements, no matter if it is traversing rural, urban or natural landscapes. Building activities must be designed and carried out in an ecologically friendly way with a strong emphasis on sustainability issues. Management of the site could be a crucial factor for success. In order to rationalize management efforts, sustainable design solutions could be preferred. Thinking a bit further, basic principles of ecologically friendly building activities are the following:

- ***Fitting best to landscape.*** Existing and new constructions should be in harmony with each other and also fit to the landscape. The best tool of fitting better to landscape is the consciousness and awareness of local landscape issues, past and present processes, the awareness of values, risks. Preference of local materials, reinterpretation of traditional ways and technologies of building, traditional patterns and structures could ensure a better fitting, without being old-fashioned.
- ***Ecological design.*** ED is a good principle and a collection of good practice for a more effective environmentally friendly design approach. A deep understanding of ecological processes is the pledge of success in landscape design - from larger scale down to every little detail. In terms of vegetation, natural and potential ecological habitats give a good preview for design activities.
- ***Low impact building activities.*** Building technologies and processes as well as materials and structures should be designed and carried out causing the least impact possible to the environment, e.g., choosing a construction period best suitable for protected wildlife.
- ***'Green' buildings***. ESS based development can be supported by the toolkit of Green Buildings (World Green Building Council) which can reduce negative effects and create positive impacts of environment. Old and new buildings and built structures could even be developed in a way serving better green infrastructure issues - better adaptation to environmental changes and enrichment of green quality and quantity. Green and blue roofs, green facades, rainwater management facilities, permeable pavements are only few tools. Green buildings with green infrastructure not only serve a more environmentally friendly operation but also suits better to the 'green' brand of the greenway.
- ***Recycle and upcycle.*** Reuse and also upgrade the local materials, buildings, furniture, pavements, other open space elements for the new project can be efficient, cost-saving, environmentally friendly and also well serving the brand - reuse of neglected buildings, refurbishing old structures (e.g. bridges, pavilions) or restructure materials (e.g. materials of demolished built structures used for pavements or new street furniture). Reuse gives an extra input to the design and can create a new design quality and also a new landmark. Recycling and upcycling is cool - give an extra communication value.

ESS-based greenway design has some significant tools which could ensure the long-term development of ecosystem services. First of all, a **design manual** should be worked out which could underline the basic principles of the design framework of the particular greenway and list the specific toolkit for the following design elements.

- ***Built infrastructure of hubs.*** Regular buildings for services (e.g. visitor centre, restaurant, bike rental and repair, accommodation, etc.) could apply the guidelines for Green Building. Reuse, reformulate, recycle are highly encouraged. The character (volume and vision) of the buildings are emblematic for the brand (e.g. Kemenes Volcano Park[5], Hungary). Pavements of the hubs create a transition between the surrounding neighbourhood and the hub itself. Parking for vehicles is one of the facilities that/which must be developed.

5 http://www.kemenesvulkanpark.hu/kemenes-volcano-park/introduction

- ***Pavements.*** The pavement of the cycleway and additional surfaces could play a major role in defining the character of the project as well as ensuring low impact strategies. The benefits of using *permeable paving* to prevent storm water runoff and replenish the groundwater supply. Permeable paving options (e.g. stabilizer, crushed stone, dry-laid pavers, open-celled grass pavers etc.) could also serve better habitat issues by creating better connectivity between the surface and underground levels.
- ***Other built structures.*** Small built structures (e.g. shelters, bird watch pavilions, public toilets, bike stands etc.) could also serve as a multi-form landmark/logo for the project on site. According to their importance, design aspects could be taken into higher consideration. Reinterpretation of traditional materials, technologies, form and structures could provide a nice play with the past and the future.
- ***Furniture and signage.*** Outdoor furniture as well as the structures for signage can also be unique for the project. Furniture (e.g. benches, bike stands, trash bins etc.) are serving different functions and could also be a special "signage":
  - → reflect the hierarchy of the sites along the route
  - → reflect a certain function
  - → reflect the special theme of a certain site
  - → remind the visitor to a certain thematic of the greenway

  Best solutions are the unique outdoor furniture families designed for a particular greenway project, concerning ESS of the site. Furniture design for the function and also for the available level of maintenance are the best practices.
- ***Habitats and greenery.*** In terms of vegetation and wildlife, most valuable places could serve as a good example. Man-made designed and maintained greenery should highly react to the habitat's conditions. Natural conditions and landscape traditions could influence the manner of new greening, as a direct tool to increase the quality of ESS. New plantation can also serve as a character defining element and be significant in the signage.

### 4.4.1 SIGNAGE AND SIGNPOSTING

Signage is an important tool, a collection of identifying marks which could transmit all important information to better serve all functions and also market and communicate the brand. Good signage occurring in landscapes as important part of the mobility guidelines are

- reflecting to the landscape character of the greenway
- operating with a logo and a slogan
- reflecting the hierarchy between sites and also in functions
- a tool of beautification
- a comprehensive tool of place attachment

Main principles to design and operate with signs occurring on site or in on-line and off-line publications of a greenway.

- ***Logo as a landmark.*** Well-designed logos can be transformed into a series of landmarks such as outdoor statues, gates, information board stands, bicycle stands, lookout towers, pavilions, outdoor furniture, etc. Landmarks could enhance the spatial identity of the project as well as place attachment of the visitors.
- ***Slogan visible on site.*** Slogans and important phrases could also be tagged into several surfaces such as paving, indoor and outdoor walls, furniture, etc. These texts are creating a special atmosphere in an open space - raising again place attachment
- ***System of signage***. With a coherent system of signage, a clear concept of the packages and all thematic layers of the product could be outlined, visible and easy to understand. To work out a visual coding, landscape character issues could provide a base.
- ***Signage for all***. Signs should be understood by everyone. Good signage gives information to everyone even people with special needs to provide equal opportunities to participate and enjoy the facilities.

***Forms of elements of signage.*** In its physical appearance there are three basic types of signage of a greenway.

- *Classic signage*. Billboards, markers, leaders, banners, tags etc. are significant basic elements of a greenway.
- *Digital/Virtual signage.* QR codes, GPS, etc. There are more and more interactions between real space and virtual/cyber space

even in ecotourism, on site. Combining and balancing the two different tools would give a wide range of possibilities of knowledge-sharing, interactivity, storytelling etc. Still on site information should be dominating.

- *Landmarks as signage*. The unusual form of a signage when an emblematic object (a look-out tower, a special and unique furniture) or any land art or environmental art piece could refer to the thematic.

**Check-list for Quality and resources of built environment**

Output: Develop a quality built environment and interpretive signage

- ☒ Define the quality resources you have for the built environment!
- ☒ Match the resources with the defined packages and routes!
- ☒ Hire a landscape architect and work out a catalogue of objects!
- ☒ Create a relevant system of signage!

## 4.5 TESTING THE PROGRAMS FOR THE SENSE OF PLACE

At creating community-based programs (activities, tourism products) for the sense of place, there is a strong need for a concrete itinerary and preparation of all the involved participants. The itinerary should be as detailed as possible, with concrete plans in case of an emergency, bad weather, etc. According to the CTC (Canadian Tourism Commission) the following issues should be considered:

- Step-by-step itinerary – focus on overlapping and planning brakes particularly for seniors and families is important
- Scheduling – "Time the experience in small increments. If it is a two hours program, think in 10 to 20-minute intervals" (CTC, 2011, p.24)
- Safety – Particularly at outdoor activity. "Review all safety matters, plan for them and have a contingency plan" (CTC, 2011, p.24)
- Guests' capacities in the focus (e.g., children, seniors, people with disabilities)

Before testing, one should make sure that all the information has been distributed to the stakeholders.

- "ensuring all guest communications have gone out and you have received any pertinent information and shared it with partners (e.g. allergies, physical limitations, late arrivals, etc.)
- reviewing the itinerary and flow of activities with everyone involved with the experience
- testing out the equipment and ensure all the supplies needed are available and in working order
- checking the weather to see if it will impact outdoor activities or the arrival and departure of guests
- gaps in your planning, preparation and any last minute things that need to be done
- ensuring everyone who will interact with travellers throughout the entire customer life cycle is aware of who your visitors are, their expectations and the type of experience you want to deliver" (CTC, 2011, p. 29)

During testing the programs the following issues should be highlighted

- Testing that every involved participant knows their tasks
- Test the program with different local segments
- Test program with „test-visitors"
- Mystery shopping

**Check-list for testing the experiences**

Steps:

- ☒ Test it with different local segments
- ☒ Test it with „test-visitors"
- ☒ Make a mystery shopping

# 4.6 MARKETING: COMMUNICATION AND LABELLING

## 4.6.1 COMMUNICATION

Any communication plan should follow the general guides and recommendations of the www.interregeurope.eu website. Namely, for effective communication, one should structure our guideline around these main elements:

- Communication objectives: goal-driven, definitive. We should inform public policy on the "EcoVeloTour" topic; raise awareness (this should be more specific as the project develops); build up or change the opinions of stakeholders (if necessary). It is advised to use the smart approach (specific, measurable, appropriate, realistic, timed).
- Target groups: The stakeholder analysis should aid our definition of target groups.
- Project messages: The project should have a clearly defined message as the centre of communication, e.g., when economy needs nature: bicycle tourism for nature's and our mutual benefit. Different segmented, experience–based messages should be developed (assuring sense of place), considering every aspect of the project and the stakeholders as well. In general, the final versions must be clear, memorable, positive, distinctive, appealing, active.
- Communication tools: Tools should be defined based on target groups. It is recommended to use the POE approach – namely, the Paid, Owned and Earned media. Paid media should include all paid advertisements (SEO, Google Ads, displays, other offline ads, etc.). Owned media should include all available platforms, such as a website, blog, news, all other online and offline platforms, but logo and other visuals as well. The paid media comes as the result of the previous two categories: it is basically the impact on social media sites, what the audience is talking about the project (mentions, shares, likes, etc.). Setting up KPIs (key performance indicators) is important.
- Internal communication: Communication of events, using the creatives, organizing public events, etc.
- Evaluation methods: Overall KPIs should be set up, regarding the communication activities. Following the online activities is relatively easy, thanks to the several analytical tools. However, we also need to measure the offline activities with selected methods, based on the actual activities: questionnaires, focus groups, media monitoring, etc.

## 4.6.2 LABELLING

One way to manage the communication activities (to ensure its effectiveness) is to develop our own labelling, where we should separate different aims: first, protecting tourists to ensure their rights as of tourists (e.g. ESS based services, created during the project). Then, by signalling to tourists, to attract their demand towards establishments complying with the defined quality, sustainability and environmental requirements of the project. Finally, by coordinating the actions of the stakeholders, by promoting compliance with certain requirements.

As the value of labels as a factor in consumer choice may seem uncertain, the communication of the label's credentials must be a key attribute in its overall utility and success in tourism. A clearly defined quality assurance must be communicated throughout the project.

**Check-list: for marketing communication**

- ☒ Determine the desired outcome of communication
- ☒ Select the appropriate communication channels
- ☒ Communicate appropriately to the defined stakeholder (target) groups
- ☒ Determine the form (content) of the communication
- ☒ Deliver the message
- ☒ Monitor the communication and feedback

# 4.7 PARTICIPATORY EVALUATION AND MONITORING

As it was mentioned before in other activities, the model of an ideal evaluation and monitoring toolkit starts again with a cross-sectoral framework, with a combination of top-down and bottom-up processes and tools. Each stakeholder and user group could have different roles and tools to join the evaluation and the monitoring process.

- **Public administration/municipal level**
  The major task of the public sector is, to set a framework and a protocol for the evaluation and the monitoring. The municipal evaluation and monitoring framework should provide all legal and scientific bases for a protocol and also staff which coordinates the work (Table 1):

| | |
|---|---|
| **Who is in charge?** | To provide the institutional bases for monitoring. It could be placed in one of the hubs and could be combined by a small research centre. |
| **What to evaluate and monitor?** | To be able to detect the changes of ESS a set of indicators must be defined. Those set of indicators (e.g. habitat diversity, water quality, etc.) which could be monitored and evaluated by a scientific team and needs a high performance infrastructure should be kept in the public sector. |
| **How?** | Qualifications, methods, frequencies |
| **What database?** | Collected monitoring data should be managed by a public and interactive database, based on a Geographic Information System (GIS). |
| **How to share?** | Information of monitoring should be shared to the wider public. |
| **Feedback to project change** | Monitoring data should be evaluated yearly and influence the following year's management programs in order to adjust the facilities to changes in ESS. |

*Table 1: The dimensions of participatory monitoring*

- **Community level**
  Monitoring is a tool of place attachment. The most convenient best practice examples are engaging the NGOs and local residents and the private sector into monitoring which does not need a deep scientific knowledge (e.g. water's pH, counting animals, flower counting, monitor the amount of trash, etc.) Indicators and tools for different stakeholder groups could vary in a wide range. School groups and NGO groups could do monitoring as a part of environmental education. Private sector employees could join the monitoring network within the CSR activities of the companies.
- **Tourists**
  Monitoring could be a tool of engaging and also entertaining visitors. Monitoring activities could be suitable to raise awareness, communicate goals, explain tools and provide examples for different target groups. Animal counting or detecting and virtual spotting is a common tool to activate and engage visitors. Monitoring is not only a way of environmental education but also a source of fun. Monitoring combined with simple games or other storytelling methods (e.g. Hide and Seek or other games) could teach and entertain at the same time.

**Check-list for participatory evaluation and monitoring**

Output: To set a participatory monitoring framework

- ☒ Define the indicators to monitor for the different groups!
- ☒ Work out a specific monitoring program!
- ☒ Control and collect the monitoring data!
- ☒ Regularly publish the monitoring data!
- ☒ Invite stakeholders to monitoring actions
- ☒ Regulate management plans and visitors' program based on evaluation of data monitored!

# 5. Glossary

### Cultural landscapes

Cultural landscapes are those areas, which possess "the combined works of nature and man' of 'outstanding universal value" (UNESCO, 2002, p.10). These are important destinations regarding nature and heritage protection, as well as tourism, with the objective of interpreting the universal values of nature as well as culture (incl. gastronomy, design, handcrafts) for the visitors in a sustainable measure.

### Ecotourism

"All nature-based forms of tourism in which the main motivation of the tourists is the observation and appreciation of nature as well as the traditional cultures prevailing in natural areas." (UNWTO, 2002, p.1.) The main highlighted dimensions are:

- Nature but also culture (if connected): The focus is mainly on intact or rare values to be conserved.
- Community-based development: involving local stakeholder in decision-making
- Low impact: Small-scale tourism with local control, and the usage of green technologies
- Education and interpretation is a key issue: environmental education of locals and tourists are among the key success factors.
- Supporting local community & conservation: direct or & indirect support of the locals (income, funding, volunteering).
- Visitor satisfaction: Ecotourism should be a memorable experience with the sense of place holding values for each niche-segments.

### Ecological design

is any form of design that minimizes environmentally destructive impacts by integrating itself with living processes. Ecological design is an integrative ecologically responsible design discipline. (Ryn S, Cowan S(1996): "Ecological Design". Island Press, p.18", Wikipedia)

### Landscape planning

Landscape planning is a branch of landscape architecture and is defined as an activity concerned with developing landscaping amongst competing land uses while protecting the potential of the landscape - natural and social processes and significant cultural and natural heritage. Greenways are one of the key examples of landscape planning. Landscape planners analyse broad issues as well as project characteristics which constrain landscape design projects.

### Greenway

Greenways are networks of land containing linear elements that are planned, designed and managed for multiple purposes including ecological, recreational, cultural, aesthetic or other purposes compatible with the concept of sustainable land use. Greenways are primary elements in green infrastructure network providing various and complex ecosystem services. A greenway is more than a bicycle/pedestrian route surrounded by vegetation. A greenway is multifunctional, continuous and uninterrupted "route" which has its own corporate identity and character. Best examples of greenways are the ones developed in creekside landscapes or in place of abandoned railway lines. (based on Ahern, J. 1995, Báthoryné Nagy, I.R. 2007, BFVT Ltd. 2016)

### Green infrastructure

is an inter-connected network of green open spaces that provide a range of ecosystem services — from clean air and water to wildlife habitat and carbon sinks. It is a network of natural, cultivated or other open areas which could provide a valuable ecosystem service. (D. Rouse, I. Bunster-Ossa, ASLA 2013)

### Green building

A 'green' building is a building that, in its design, construction or operation, reduces or eliminates negative impacts, and can create positive impacts, on our climate and natural environment. Green buildings preserve precious natural resources and improve our quality of life. https://www.worldgbc.org/

### Labelling

The labelling process should ensure and promote the quality standards that are mandatory for all stakeholders. The label (consisting all written, printed or graphic matter) should be used on all online and offline communication platforms and channels (such as tags, pamphlets, displays, any kind of promotional material).

### Nature-based Solutions

"NbS are intended to support the achievement of society's development goals and safeguard human well-being in ways that reflect cultural and societal values and enhance the resilience of ecosystems, their capacity for renewal and the provision of services. NbS are designed to address major societal challenges, such as food security, climate change, water security, human health, disaster risk, social and economic development."
(https://www.iucn.org/commissions/commission-ecosystem-management/our-work/nature-based-solutions )

### Place attachment

Place attachment refers to a positive emotional bond between an individual and a particular place (Low and Altman, 1992).

### Sense of place

Sense of place is developed by people as a result of biological, individual and sociocultural processes, during getting into contact with places through nature or sociocultural interactions, and take place while people experience (by interacting, knowing, perceiving, or living) the physical environment.

# 6. Annex 1:
## Partner's experience – Results of the Budapest workshop

Hereby the results of the workshop called partner's experience taken place in Budapest (2nd October, 2018) are detailed with identifying the key takeaways, from the results of the workshops, which were used to structure the guide and highlight the important or problematic issues. There were three working groups dealing with the following issues:

1. **Planning ecotourism projects**
2. **Implementing ecotourism projects**
3. **Ecotourism experience**

### Planning

#### Key takeaways

The team focused on the most important milestones of project planning, with a high attendance of market research and collecting knowledge, as well as the local resources and involvement of local actors and a special focus of service suppliers. The importance of partnership – as well as the sensitivity and management problems of co-operation – were mentioned, so this should be a highlighted issue in the guide. Impact analysis could be also an important issue (not mentioned). (There were different round-tables, with different codes so as to ensure reliability).

| Milestones | Stakeholders | | | | | Success factors mentioned by the team | Failure factors mentioned by the team | Success factors considering planning at the best practices | Failure factors considering planning at the best practices |
|---|---|---|---|---|---|---|---|---|---|
| | Core industry players | Connected industries | Supporting institutions | Business partners | Costumers | | | | |
| **Arrange the idea** | | | Authorities and destination management organizations | | | Partnership | | • good idea, special attraction<br>• undiscovered niche (1,2)<br>• study tour in Toscana, -studies in eco, gastro, recreation fields, movies and routes (1,3)<br>•very little maintenance needed, no physical infrastructure necessary (1,5)<br>• the attraction can be reached only by hiking/biking (1,5)<br>•interest of public org. in charge for national park management (1,6)<br>• awareness raising esp. for small businesses (2,5)<br>•bottom-up development (2,5)<br>• established cooperation with service providers, established cooperation with 18 municipalities, cooperation across borders with Austria & Croatia, national road authority enabled unified signposting (2,7)<br>• Enjoyment of partners in different countries (3,8) | • uncertainty of project objectives (1,2)<br>• failure to involve local stakeholders (1,2)<br>• little/no contact with locals (1,5)<br>• no stakeholders cooperation between each other at attraction, value inventory (1,3)<br>• critical mass of participants not yet reached (2,5)<br>• funding, politics (2,6)<br><br>If you want to go by bike you can't go all the time next to the creek. 2. There aren't many desks & chairs along the route where you can take a rest (3,9 |
| **Inventory of services and market research** to find the niche market | Local service suppliers | Suppliers; complementary products (thermal tourism, gastronomy) | Decision makers of municipalities; academic sector | | Tourists | Focusing on local resources | | | |
| **Collecting the local knowledge** | | | Regional tourism agencies; Cultural conservation agencies; accommodations | | | | | | |
| **Tour operators** (How to reshape the product?) | Niche tour operators OTA; travel agencies | | | | | | | | |
| **Building the product map of the route** (finance, itinerary; safety, promotion ownership, monitor & evaluate) | Tour operators | | Local municipalities; government; local DMOs | Investors; media | | Other product connected (thermal water, f&b;) holding uniqueness | | | |

*Table 2: The milestones of an ecotourism experience*

## Implementation

### Key takeaways

The workshop session addressing the topic 'implementing ecotourism' covered a variety of topics, from best practices to main milestones of implementation process. By collecting of the success and failure factors one of the most highlighted message was the importance of supportive stakeholders during the whole process. To encourage greater participation at all stakeholders is essential to project success which could be ensured by 1.) understanding their expectations, 2.) defining roles and level of participation, 3.) determine if there are conflicts of interest among groups of stakeholder. Besides all this 4.) keeping stakeholders involved and well informed is necessary. To develop a shared passion between the stakeholders could be a key to success, but not the only one. Funding issues come also to the focus in the session. Ensuring consistent and adequate funding for implementation and to design & deploy funding mechanisms were mentioned related to this.

| Milestones | Stakeholders | | | | | Success factors mentioned by the team | Failure factors mentioned by the team | Success factors considering planning at the best practices | Failure factors considering planning at the best practices |
|---|---|---|---|---|---|---|---|---|---|
| | Core industry players | Connected industries | Supporting institutions | Business partners | Costumers | | | | |
| **Preconditions of successful implementation** (Idea, issues, objectivities) | | | Policy makers | Media | | Authenticity and transparency of product<br><br>Evidence-based information on market demand<br><br>Set of highly engaged actors | Lack of<br>• funding<br>• collaboration<br>• clear objectives<br>• optimism and creativity<br><br>Differences between stakeholders in their level of involvement<br>Issues of seasonability<br>• opening times in low season<br><br>Politic | • Prioritization on public agenda (1,7)<br>• The route was identified and signposted. (2,1)<br>• The route is well described on the Internet (2,2)<br>• Development of knowledge on sites (3,1)<br>• All types of eco-tourism in Danube Delta (3,1)<br>• Local and municipality awareness on developing the eco-tourism (3,1)<br>• Try to maintain a nature based eco-village (3,2),<br>• Sustainable food producer process (3,2)<br>• Standardize travel experiences and quality of products (3,8)<br>• Support of product development & sustainability (3,8)<br>• There is a good signage along the route. (3,9) | • Difficulties of marketing (selling the product on the private market) (1,2)<br>• The route is huge and cannot be maintained on the long-term (2,1) (3,8)<br>• No local ownership/ maintenance / management of the product (1,6)<br>• Lack of research (3,8)<br>• Promotion & visibility (1,6) (3,1) (3,8)(3,10)<br>• Coordination, ownership of the product (1,6) (1,7)<br>• Lack of interest of public authorities, (1,7)<br>• The project has developed by a single NGO which has no capacity to maintain on the long-term. Too vast scope vs. too small capacity from developing organization. (2,3)<br>• Not solved seasonality problems (closed restaurants) (2,4)<br>• Quality of infrastructure not good enough. (2,4)<br>• Slow response from railway service (2,7)<br>• missing regional (DMO) level in Slovenia (2,7)<br>• long duration of implementation (3 years) (2,7)<br>• limited resources for promotion (2,7) |
| **Implementing strategies and planning**<br>🡻 Evidence-based information on market demand<br>🡻 Bottom-up approach<br>🡻 Set of highly engaged actors<br>🡻 Cooperation across borders<br>🡻 Established cooperation with service prividers and municipalities | | Road maintenance companies | Decision makers of municipalities; | | Tourists | Evidence-based information on market demand<br><br>Bottom-up approach<br><br>Set of highly engaged actors<br><br>Cooperation across borders<br><br>Established cooperation with service providers municipalities | Lack of<br>-time for implementation<br><br>Quality of infrastructure<br><br>Sustainability | | |
| **Solution development and deployment**<br>🡻 Infrastructure built<br>🡻 Signage is posted<br>🡻 Promotion has started<br>🡻 Route is tested<br>🡻 Route open for use | Service suppliers | Land owners, farmers; | Regional tourism agencies; Cultural conservation agencies; accommodations | | | Appropriate solutions and facilities (eg. familie freiendly, for rany days)<br><br>Awareness raising | Limeted reources for promotion<br><br>Prolonged implementation | | |
| **Support and monitoring evaluation** | Transport providers; | Media; | | | | | Long term maintance is questionable<br>Capacity to maintence<br>Plans realisation did not susseded<br>Finance<br>Lack of enthusiastic decision makers | | |

*Table 3: The milestones for ecotourism implementation*

**Consumer experience**

## Key takeaways

The customer experience session had the task to work on a limited part of the customer journey. Customer journeys include many things that happen before, during, and after the experience of an ecotourism related cycling tour. Journeys can be long, stretching across multiple channels and touchpoints. The team focused only on the 'experiencing the destination' phase of the journey and tried to collect all the touch points and services which can assure the perfect consumer experience. One of the key challenge for the group was to figure out how to make the route attractive to a broader audience. Related to this many suggestion was made on how to make routes easier to complete for different target groups

**Best practices**

## Key takeaways

The best practices mentioned by the partners vary a lot in regard to the focus (hiking, biking or adventure tourism), however, pristine nature is in the middle of the projects, as well as involving local tourism service suppliers and local suppliers (e.g. food and beverage). Experiencing nature ("local impressions") is the focal point of the experience; however, being healthy, green and eating local food also important. Among the suwccess factors, bottom-up development, strong co-operation can be highlighted, as well as the well-identified and communicated (via internet) route itineraries., while among the failure factors the lack of communication and long-term maintenance can be namedUsing green practices (e.g. green infrastructure, re-cycling, waste management) were rarely mentioned.

# 7. Annex 2:
# Cyclist Welcome (Quality management) & Bett und Bike

### CYCLISTS WELCOME - HOLIDAY, TOURING AND CAMPING PARKS AND INDIVIDUAL CARAVAN (VISITBRITAIN, 2002)

"Cycling is an increasingly popular way of taking a holiday in the UK. British visitors took an estimated 26 million cycling trips in England in 2002 alone.

The new scheme, which was developed with expert advice and support from the Countryside Agency and the Youth Hostel Association, will give cyclists the confidence that they are booking quality accommodation that meets their particular needs. Simple common criteria for the scheme have been introduced along with several activity specific requirements. All participants must be a member of the British Graded Holiday Parks Scheme or an assessed Individual Caravan. Facilities and Services:

- A separate and secure facility should be available with a heat source for drying outdoor clothing and footwear.
- Bicycle rack suitable for locking bicycle to adjacent to reception and other central facilities.
- Lockable undercover area for safe overnight storage of bicycles and panniers, with an unobstructed entrance.
- Access to facilities with water supply for washing bicycles and outdoor clothing. This should be clearly labelled and advertised
- and should be separate to the drinking water points, hose and/or bucket and cloth to be available.
- Emergency cycle and puncture repair kit available centrally, and advertised as available in reception. Suggested items to include: tyre levers, puncture repair kit, lubricant, pump capable of being used for different valves, these may be charged for.
- First Aid kit to be provided as appropriate to size of business, this may be located in a central point and advertised in each
- letting caravan and at reception.
- Clothes washing facilities, laundry service or details of nearest launderette facility should be provided.

**Food Arrangements:**

- In the case of campers, where there is no cafe (or similar) serving hot drinks throughout the day on site or the facilities to make one, then an offer of a hot drink on arrival should be made to all campers (i.e. before or whilst pitching their tents).
- Details and directions for the nearest food shop provided, if not available on site. This can be at a central, easily accessible
- information point and should also be placed in hire fleet.
- Provision, on request, for the pre-ordering of basic grocery items prior to arrival for guests arriving without a car.

**Information Provision:**

This can be at a central, easily accessible information point and may be placed in hire fleet.

- Details of nearest cycle hire outlets and cycle repair/spares shops available.
- Details of nearest doctor, dentist, hospital, and all night chemist and vets (if pets accepted). Access to these details should be prominent and available 24 hours.
- Maps and books available for reference on cycling in the area/details of local and regional cycling routes and organisations.
- Information on local public transport and what cycle carriage facilities are available or contact details provided. Also details of any baggage transfer and taxi companies operating locally.
- Weather information for the area displayed prominently and/or telephone numbers that can be called for the latest information by guests, if required.
- Information on local attractions and events and/or local tourist information centre number and directions supplied.

- Information provided on location and opening times of nearest shops, including directions.
- Details of nearest bank/cash machine, public telephone, post office, post box and outdoor equipment shops.
- Details displayed for rescue services, including Mountain Rescue and Coastguard (if appropriate) and stating 999 phone number (112 from a mobile phone).
- Details displayed of the Countryside Code (www.countrysideaccess.gov.uk or 0845 100 3298).
- Details of local restaurants and pubs offering food.
- Information on other businesses participating in the Cyclist Welcome scheme.
- If group bookings are taken information should be available for groups on storage facilities, dining facilities/options, and pre arrival information required and provided." (VisitBritain, 2002)

### BETT UND BIKE (ADFC, 2018)

You're into mountain biking or road racing and have very special demands for your accommodation? Bike-friendly hosts in some German states hold the extra certification Bett+Bike Sports (Bett+Bike Sport). This seal guarantees exceptional security, service, care and equipment for sportive cyclists. Together with experts from the German Mountain Bike Initiative (Deutsche Initiative Mountainbike; DIMB), the ADFC has developed four categories of Bett+Bike Sports criteria: security, service, care and equipment.

**Bett+Bike Sports hosts offer you the following extra services:**

- Theft-proof room for bikes
- Weather updates
- Healthy packed lunch
- Special cycling maps available for sale or to borrow
- Drying room
- Laundry service
- Washing area for bikes
- Late departure / shower option
- Service corner (extra room for repairs with repair stand)
- Special tools available for free
- Contact to nearest specialized workshop

**Additional criteria for Bett+Bike Sports hosts**
(at least two must be met):

- Information on picking routes for MTB or road bike tours
- Roadside assistance and pick-up service
- Mountain bike or road bike rentals
- GPS tours and GPS devices
- Massage service
- Guided tours or instructed riding technique seminars

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## FURTHER RECOMMENDED READINGS

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