



Tourism for Sustainable Development in Least Developed Countries

Leveraging Resources for Sustainable Tourism with the Enhanced Integrated Framework



2017
INTERNATIONAL YEAR
OF SUSTAINABLE TOURISM
FOR DEVELOPMENT



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**Tourism for Sustainable Development in the Least Developed Countries –
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World Tourism Organization (UNWTO)
Calle Capitán Haya 42
28020 Madrid
Spain

Tel.: (+34) 915 678 100

Fax: (+34) 915 713 733

Website: www.unwto.org

E-mail: omt@unwto.org

International Trade Centre (ITC)
Palais des Nations
CH-1211 Geneva 10
Switzerland

Tel.: (+41)-22 7300 111

Fax: (+41) 22 7334 439

Website: www.intracen.org

E-mail: tradeinservices@intracen.org

Executive Secretariat for the
Enhanced Integrated Framework at the WTO
Rue de Lausanne 154
CH-1211 Geneva 21
Switzerland

Tel.: (+41) 22 739 6650

Fax: (+41) 22 739 5766

Website: www.enhancedif.org

E-mail: eif.secretariat@wto.org

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Acronyms

Unless otherwise specified, all references to dollars (\$) are to United States dollars.

CRS	OECD Creditor Reporting System
DAC	OECD Development Assistance Committee
DTIS	Diagnostic Trade Integration Study
EIF	Enhanced Integrated Framework
GDP	Gross domestic product
ITC	International Trade Centre
LDC	Least developed country
LIC	Low-income country
NIA	EIF National Implementation Arrangement
NTA	National tourism authority
NIU	EIF national implementation unit
ODA	Official development assistance
SDG	Sustainable Development Goal
UN	United Nations
UNWTO	World Tourism Organization
WTO	World Trade Organization

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Foreword

This joint report on “Tourism for Sustainable Development in Least Developed Countries” is published as we celebrate the International Year of Sustainable Tourism for Development in 2017. This year is also the first year in which the Sustainable Development Goals (SDGs) are effective.

The United Nations has designated 2017 as the International Year of Sustainable Tourism for Development recognizing the important contribution of tourism in advancing the SDGs. Tourism contributes, directly or indirectly, to all of the 17 Goals and is specifically included in Goals 8, 12 and 14 on inclusive and sustainable economic growth, sustainable consumption and production, and the sustainable use of oceans and marine resources, respectively. Tourism indeed makes a key contribution to many of today’s global challenges, including economic growth, poverty alleviation, job creation, women’s empowerment, environmental and cultural preservation and peace.

Tourism is estimated to represent 10% of global GDP and generates directly or indirectly one in ten jobs globally. It is a resilient sector, which despite all challenges continues to see international tourist arrivals grow at an annual rate of over 4% since 2009. Generating 7% of all international trade, the sector is also of increasing importance to the trade community. It is important to recall that tourism is a form of services trade and that tourism accounts for 30% of the world’s trade in services. Tourism is of particular value for least developed countries (LDCs), where it represents 7% of total exports of goods and services, a figure that stands at 10% for non-oil LDC exporters. Tourism is also the major economic earner in many small island developing states.

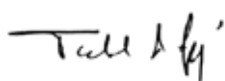
In view of the above, and as shown in this report, tourism has been recognized as a key sector for trade-related technical assistance in LDCs. Forty-five out of 48 Diagnostic Trade Integration Studies – an important coordination instrument for trade-related technical assistance – analysed for this report feature tourism as a key sector for trade development. Accordingly, the Enhanced Integrated Framework (EIF) has become increasingly active in this sector. Close to 10% of its so-called Tier 2 project portfolio is currently dedicated to tourism. This stands in stark contrast with the less than 1% allocated in total Aid for Trade to tourism.

Yet despite tourism’s value in the trade agenda, it is often difficult to direct trade-related technical assistance towards the sector because tourism and trade tend to fall under different line ministries. Successful interventions in tourism require strong collaboration across government agencies as well as across different actors at the regional or local level. The World Tourism Organization (UNWTO) and the International Trade Centre (ITC) are determined to contribute to this process of increased coordination and collaboration by joining their forces in the design and implementation of tourism export strategies.

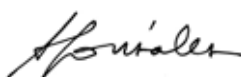
Commitment and investment in coordinating and raising tourism’s prominence in trade-related technical assistance will ensure the sector delivers on its powerful capacity to create jobs and incomes where they are most needed and for those who are most vulnerable – including youth and women. Well-designed projects can also contribute to protect the environment and safeguard cultural diversity and heritage.

Finally, tourism can play an important role in fostering mutual understanding, peace and security. A tool for soft diplomacy, tourism builds bridges between different peoples and creates opportunities for enriching exchanges between visitors and hosts as well as for cross-cultural encounters.

We trust that in these complex times, this joint study aimed at making the most out of tourism’s potential to build better lives in LDCs, can contribute not only to inclusive and sustainable development but also to security and enduring peace.



Taleb Rifai
Secretary-General
UNWTO



Arancha González
Executive Director
ITC



Ratnakar Adhikari
Executive Director
EIF

Executive summary

Tourism is widely recognized as a key sector for achieving the United Nations Sustainable Development Goals (SDGs), given its major potential to contribute to jobs and wealth in the developing world. Tourism's relevance for development is also reflected in one of the most important coordination instruments of trade-related technical assistance in least developed countries (LDCs): the Diagnostic Trade Integration Studies (DTIS) of the Enhanced Integrated Framework (EIF).

In the 2030 Agenda for Sustainable Development, tourism explicitly features as a target in Goals 8, 12 and 14 on inclusive and sustainable economic growth, sustainable consumption and production, and the sustainable use of oceans and marine resources, respectively. Yet, given the sheer size – tourism is estimated to represent around 10% of global gross domestic product (GDP) – and the cross-cutting nature of the sector, it has the potential to contribute directly and indirectly to all 17 SDGs.

Tourism for inclusive growth

Tourism has been estimated to generate one in ten jobs in the world. The sector is considered to create many jobs for vulnerable segments of the labour market including the young and women. As such, growth in tourism can contribute directly to the inclusiveness of growth. The tourism sector has also shown significant resilience. Despite recent slow economic growth and geopolitical tension in some regions of the world, international tourist arrivals have experienced an annual increase of around 4% since 2009. Tourism currently represents 7% of total world exports, 30% of world services exports and its importance for trade continues to grow.

Not surprisingly therefore, tourism has gained importance within the international development agenda over the past few years, and the transition to the SDGs has solidified this trend. Selecting 2017 as the International Year of Sustainable Tourism for Development has put the spotlight on tourism in the first years of implementation of the SDGs.

Trade-related technical assistance in tourism for sustainable development in LDCs

With its focus on technical assistance delivered through the EIF, this report assesses how trade-related technical assistance can contribute to enhancing tourism's contribution to sustainable development in LDCs. The EIF brings together partners and resources to support LDCs in using trade for poverty reduction, inclusive growth and sustainable development. It plays a crucial role in coordinating the design and implementation of trade-related technical assistance to LDCs.

EIF support is based on DTIS and their action matrices. These studies are conducted at the request of LDCs and encompass a review of the macroeconomic environment, regulatory and trade policies, the business climate, and country competitiveness. Their emphasis varies depending on the needs and priorities of the requesting government. The analysis is enriched by a focus on priority sectors for tradable goods and services, typically including tourism.

For the purpose of this report, the World Tourism Organization (UNWTO) together with the EIF Executive Secretariat and the International Trade Centre (ITC) reviewed 48 DTIS and their action matrices. In addition, national implementation units and national tourism authorities were consulted via a questionnaire. The collected information was examined using the framework developed in the *Sustainable Tourism for Development Guidebook* (2013, UNWTO for the European Commission Directorate General for International Cooperation and Development).

Diagnostic Trade Integration Studies : Three major findings

1. LDCs recognize tourism as a sector with significant potential for stimulating growth, promoting development, job creation, poverty reduction and improving their international reputation: 45 out of 48 analysed DTIS have tourism chapters or tourism references: 32 in Africa, six in Asia, one in the Americas, and six¹ in the Pacific.
2. The tourism-related references made in the DTIS tend to focus on the economic facets of tourism: Among the five key pillars for sustainable tourism, the second pillar *Economic performance, investment and competitiveness* is by far the most frequently referenced pillar in all DTIS. The first pillar *Tourism policy and governance* follows at a distance.
3. The DTIS is hardly or not at all used for communication with donors on tourism-related technical assistance, neither on the trade side nor on the tourism side. This is the case even though the trade community considers the DTIS a useful vehicle for better understanding tourism related issues and national tourism stakeholders express that the DTIS is successful in triggering new and fresh thinking about tourism.

¹ Timor Leste is included in the Pacific region for the purpose of this report.

At the time of writing this report, the EIF was implementing tourism projects in Burundi, Cambodia, Liberia, Sierra Leone, Solomon Islands, and Vanuatu. The number of tourism projects submitted by LDCs for EIF support might appear limited; however at the end of 2014, total EIF commitment on tourism was \$8.63 million, equivalent to 9% of its Tier 2 project portfolio. The EIF support is important when compared to 0.46% of Aid for Trade allocated to tourism between 2010 and 2015, which is in stark contrast to the emphasis put on tourism's importance for development and the sector's capacity to contribute to the achievement of the SDGs.

Finding (3) provides useful hints as to why this discrepancy exists between the high demand for trade-related technical assistance on tourism and the relatively modest response to this from the donor side. The findings suggest that a persisting disconnect between trade and tourism stakeholders at the country level, in the donor community and among implementing agencies makes it difficult to move from diagnostics to action.

While the DTIS process is rather successful in bringing trade and tourism stakeholders together during the DTIS conception, this relationship weakens when it comes to the design of action matrices that are crucial for the implementation of any action meant to address the needs identified in the DTIS. This may be due to the fact that trade and tourism communities each have their separate mechanisms for resource allocation. Networks through which the matching between allocation of assistance and identified needs takes place may also be separate, making it difficult to handle 'trade and tourism' issues together.

From diagnostics to action: Four recommendations to strengthen the transition

There are a number of ways in which the transition from diagnostics to action could be strengthened, including:

1. Reinforcing the involvement of tourism-related institutions with trade institutions at the national level during the formulation of action matrices;
2. Raising awareness at the level of tourism ministries or relevant line ministries of the DTIS process and its relevance for fundraising.
3. Initiating donor consultations by the Donors Facilitator while DTIS/DTIS Update concept notes are circulated, to realistically identify expected Aid for Trade funding to be included in action matrix priorities. Donor counterparts who typically liaise with national tourism authorities should ideally be included in this process.
4. Facilitating mechanisms that trigger the initiation of sector-specific strategies as a direct follow-up to action matrix validation. In the context of tourism, this could lead to the formulation of sustainable tourism export strategies.

These proposed actions could also help address another gap that has been identified in this report: the tourism-related references in DTIS tend to focus on the economic facets of tourism and pay less attention to specific social and environmental aspects. Tourism-related needs expressed in the DTIS rarely target explicitly vulnerable communities and rarely pay attention to potential negative social or environmental side effects of tourism activities. Social and environmental aspects are important if assistance is to foster tourism that is sustainable. Closer collaboration between different stakeholders, including those in charge of environmental sustainability and poverty reduction could help.

An EIF partnership can be a powerful catalyst for leveraging Aid for Trade resources for tourism development – and the DTIS play an important role in this. A better understanding of the EIF by tourism ministries and a closer dialogue with trade ministries can lead to substantial improvements in addressing tourism related needs and thus contribute to strengthening the contribution of trade-related technical assistance to the fulfilment of the SDGs.

Introduction

Tourism is a crucial growth sector for least developed countries (LDCs). In 2015, the world's 48 LDCs received 29 million international tourist arrivals – nearly three times as many as a decade ago – and earned \$21 billion from international tourism. Tourism now represents 7% of LDCs' total exports of goods and services, and for non-oil exporters, the figure stands at 10%. Although the role of tourism for local economies differs across LDCs, this role has been significantly positive for some of them. Tourism was among the main contributors, enabling the graduation of Cabo Verde, the Maldives and Samoa from their previous LDC status.

The Tourism sector has shown significant resilience, despite recent slow economic growth and geopolitical tension in some regions of the world. Tourism represents nearly 10% of the world's GDP and 30% of global services exports. The sector ranks third after fuels and chemicals, and is ahead of food and automotive products in international trade. Tourism is a major source of foreign exchange and investment, and generates employment and business opportunities.² Tourism has been estimated to generate one in ten jobs in the world. The cross-cutting and labor-intensive nature of tourism creates links to many other economic sectors, and positions it as a valuable contributor to national development strategies.

Tourism in least developed countries, 2015

29 million	international tourist arrivals
\$21 billion	in exports
7%	of total exports
14%	average annual growth in LDC international tourist arrivals, compared to 7% worldwide (2000–2014)

Source: UNWTO, 2016.

Not surprisingly therefore, tourism has gained importance within the international development agenda over the past few years, and the transition to the Sustainable Development Goals (SDGs) has solidified this trend.

In 2015, the United Nations General Assembly adopted the 2030 Agenda for Sustainable Development and its set of 17 SDGs, which outline a universal, integrated and transformative vision for a better world until 2030. Building on the Millennium Development Goals, the SDGs – together with their 169 associated targets – lay out a new plan of action for people,

planet and prosperity. It entails that the three dimensions of sustainable development – economic, social and environmental – are managed in an integrated and balanced manner.

Tourism is a key sector for achieving the SDGs and can be a powerful vehicle to promote and reach the milestones of the ambitious agenda, given that it is one of the major sectors in international trade and a main job and wealth creator for many countries. In fact, tourism explicitly features as a target in SDGs 8, 12 and 14 on inclusive and sustainable economic growth, sustainable consumption and production, and the sustainable use of oceans and marine resources, respectively. Yet, given the sheer size and the cross-cutting nature of the sector, it has the potential to directly and indirectly contribute to all 17 SDGs.

International tourism is a complex sector that covers travel related for both business and leisure and that has multiple backward and forward linkages into diverse sectors of the economy. When tourists spend time outside their home country, they are considered to consume tourism services abroad. By its very nature, therefore, international tourism involves the export and import of services: international tourism equals international trade.³

Because of tourism's important role in international trade, trade-related technical assistance and the mechanisms that govern its design and implementation are important for tourism. The Enhanced Integrated Framework (EIF) plays an important role in this context. The EIF brings together partners and resources to support LDCs in using trade for poverty reduction, inclusive growth and sustainable development. It plays a crucial coordinating role in the design and implementation of trade-related technical assistance to LDCs. In this context it is interesting to point out that the EIF is explicitly mentioned in the SDG 8 as a means of implementation: '8.a Increase Aid for Trade support for developing countries, particularly LDCs, including through the Enhanced Integrated Framework for LDCs'. Tourism is also mentioned in SDG 8 – as one of the targets: 'By 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products'.

² 'Aid for Trade and Value Chains in Tourism', WTO-OECD-UNWTO, 2013. Report available from: https://www.wto.org/english/tratop_e/devel_e/a4t_e/global_review13prog_e/tourism_23june.pdf

³ Tourism is travel for recreational, leisure, or business purposes. The World Tourism Organization defines tourists as people "traveling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes". Tourism-related expenditure is considered to be so-called mode 2 type of services trade under the World Trade Organization's General Agreement on Trade in Services (GATS), i.e. services trade that involves the customer consuming in the country of the services supplier.

The need for further assistance to develop the tourism sector in LDCs is frequently emphasized within the EIF context. Notwithstanding tourism's recognized relevance for development and notwithstanding the confirmation of this fact through needs assessments like those carried out through the EIF, tourism is not yet a significant priority for donor countries. Between 2006 and 2013 only 0.09% of total official development assistance (ODA) and 0.4% of total Aid for Trade disbursements were reported by donor countries to be allocated for tourism.⁴

Tourism and development assistance: Total disbursements, 2006–2013¹

0.09%**	Official development assistance (ODA) share
0.4%*	Aid for Trade share
0.7%*	Trade-related other official flows (OOF) share

Sources: *WTO/OECD Aid for Trade at a Glance 2015
 ** OECD/DAC-CRS Creditor Reporting System
 UNWTO (2015)

From the above it appears that there is a clear gap between the importance of tourism to achieving the SDGs and the resources allocated to meet tourism-related objectives in the SDGs. This study aims at assessing what can be done in order to close this gap.

To do so, EIF material has been systematically examined to reach an understanding of LDCs' needs in the area of tourism, with a focus on analysing EIF's Diagnostic Trade Integration Studies (DTIS).

EIF support is based on DTIS and their action matrices. These studies are conducted at the request of LDCs and encompass a review of the macroeconomic environment, regulatory and trade policies, the business climate, and country competitiveness. Their emphasis varies depending on the needs and priorities of the requesting government. The analysis is enriched by a focus on priority sectors for tradable goods and services, typically including tourism.

Through these DTIS, LDCs can prioritize trade-related developmental needs in the context of national development and poverty-reduction strategies, with the objective of enhancing their participation in the multilateral trading system. The priorities and needs identified by the studies are captured in an action matrix which functions as a blueprint for interventions by development partners.

⁴ This does not include Aid for Trade for tourism-related infrastructure, because it is not disaggregated from general infrastructure Aid for Trade.

The World Tourism Organization (UNWTO) together with the Executive Secretariat for the EIF and the International Trade Centre (ITC) reviewed 48 DTIS and their action matrices.⁵ In addition, national implementation units (NIUs) and national tourism authorities (NTAs) were consulted via a questionnaire.⁶

The collected information was examined using the framework developed in the *Sustainable Tourism for Development Guidebook*⁷ (see Box 1). The Guidebook covers tourism in all its dimensions, including topics relating to planning, development, management and impact. In addition, this study builds on the 2011 paper *Tourism and Poverty Reduction Strategies in the Integrated Framework for Least Developed Countries*⁸, prepared by the United Nations Development Programme (UNDP) and the United Nations Steering Committee on Tourism for Development.⁹ By combining material developed by the 'tourism community' with material and mechanisms used in the 'trade community', the study intends to directly address one bottleneck that may have prevented aid to work for tourism: the disconnect between tourism and trade.¹⁰

⁵ Annex 1 provides a list of the DTIS analysed, which contain a section dedicated to tourism.

⁷ Joint UNWTO-EU (DG DEVCO), "Sustainable Tourism for Development Guidebook". (2013). Available at: <http://www2.unwto.org/en/content/sustainable-tourism-development-developing-countries-document-three-interlinking-parts>

⁸ UNDP "Tourism and Poverty Reduction Strategies in the Integrated Framework for Least Developed Countries" 2011. Available at: http://unwto.org/sites/all/files/pdf/undp_discussion_paper_tourism_and_poverty_reduction_strategies_in_the_integrated_framework_for_least_developed_countries.pdf

⁹ The United Nations Steering Committee on Tourism for Development (SCTD) brings together the tourism-specific experiences and expertise of each of its Members with a view to creating synergies for a more coordinated, effective and efficient delivery of technical assistance to developing countries, thus complementing their efforts to establish a competitive national tourism sector. Since 2010, UNWTO joined forces with 9 UN agencies: International Labour Organization (ILO), International Trade Centre (ITC), United Nations Conference on Trade and Development (UNCTAD), United Nations Environment Programme (UNEP), United Nations Educational, Scientific and Cultural Organization (UNESCO), United Nations Industrial Organization (UNIDO), World Trade Organization (WTO) and UN Women. More info available from: <http://icr.unwto.org/sctd>

¹⁰ See also ITC-UNWTO (2015) on the need for greater coherence between the two worlds.

Box 1: Key dimensions and themes of sustainable tourism

UNWTO has defined sustainable tourism as 'tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities'.¹¹ Starting from this definition, the Guidebook groups the key dimensions and themes of sustainable tourism into **five pillars and 17 sub-pillars**.¹²

1. Tourism Policy and Governance: This pillar concerns the recognition of tourism in sustainable development policies and the presence and implementation of a clear tourism strategy that embraces sustainability principles. It looks at tourism governance structures, including tourism ministries and institutions and how they relate to other areas of government that affect its sustainability and performance. It also considers the presence of structures and mechanisms for engaging public, private and third sector stakeholders, including local communities, at different levels. Three sub-pillars are identified:

- The position of tourism in development policies and programmes
- Tourism policy and regulatory framework
- Tourism governance and institutional setup.

2. Economic Performance, Investment and Competitiveness: This pillar considers the business and investment environment and the position of trade liberalization in the tourism sector, including the consequences for the local economy, small businesses and sustainability in general. It looks specifically at issues of market access, product quality and the resilience of the sector. It recognizes the need for sound data to inform tourism planning and management. Four sub-pillars are identified:

- Measuring tourism and its contribution to the economy
- Trade, investment and the business environment
- Brand, marketing and product positioning
- Resilience, security and risk management.

3. Employment, Decent Work and Human Capital: The role of tourism as a generator of employment is a key aspect of its contribution to sustainable development. This pillar is concerned

partly with the planning of human resources to meet the needs of the sector and partly with the quality of jobs provided, including conditions of employment. Skills assessment and provision of relevant training and capacity building is covered as a specific theme. Two sub-pillars are identified:

- Human Resources planning and working conditions
- Skills assessment and the provision of training.

4. Poverty Reduction and Social Inclusion: This pillar focuses on the contribution of tourism to poverty reduction. It considers a strategic approach to pro-poor tourism at a destination level, employing techniques such as value chain analysis. It then considers specific initiatives to gain more benefit for the poor, based on seven mechanisms identified by UNWTO, including strengthening local supply chains, working with the informal sector, developing community-based initiatives and securing collateral benefits from tourism. Four sub-pillars are identified:

- An integrated approach to poverty reduction through tourism
- Strengthening pro-poor tourism initiatives
- The inclusion of disadvantaged groups in the tourism sector
- The prevention of negative social impact.

5. Sustainability of the Natural and Cultural Environment: The critically important relationship between tourism and natural and cultural heritage is a key theme of this pillar, considering policies and actions to conserve the asset base, to manage tourism in sensitive areas and secure benefits from it. Specific attention is paid to mitigation and adaptation of the tourism sector to climate change. Finally, the use of mechanisms to improve the sustainability of tourism development and operations, and to monitor impacts, is assessed. Four sub-pillars are identified:

- Relating tourism to the preservation and management of natural and cultural heritage
- Resource efficiency and relation to climate change
- Enhancing sustainability of tourism development and operations
- Measuring and monitoring tourism impacts.

¹¹ UNWTO and UNEP (2005) "Making Tourism More Sustainable – A Guide for Policy Makers". Available from: <http://www.unep.fr/shared/publications/pdf/DTx0592xPATourismPolicyEN.pdf>

¹² The 17 sub-pillars are further divided into 32 issues (DEVCO pp. 39-40).

How to strengthen tourism in LDCs: New insights

Following the above described approach, the 48 DTIS and action matrices completed in December 2016 were included in the analysis for this study (Table 1).

The first step was to extract actual descriptive references to tourism from the DTIS and DTIS Updates, and corresponding action matrices. The second step was to code the tourism references into the five pillars and to group them into a country-based matrix.

Once the references were grouped in this way, the next step was to refine the analysis by coding the references by sub-pillar.

Box 2 provides an example of the aforementioned analysis, showing the findings related to tourism identified in Sudan's DTIS Update from 2014, and grouped in the UNWTO-EU (2013) Guidebook's five pillars.

Table 1: EIF regions and countries with tourism in their DTIS

Africa	Angola, Benin, Burkina Faso, Burundi, Cabo Verde, Central African Republic, Chad, Comoros, Djibouti, Equatorial Guinea, Eritrea, Ethiopia, the Gambia, Guinea, Guinea Bissau, Lesotho, Liberia, Madagascar, Malawi, Maldives, Mali, Mauritania, Mozambique, Niger, Rwanda, Sao Tome and Principe, Senegal, Sierra Leone, Somalia, South Sudan, Sudan, Uganda, United Republic of Tanzania, Yemen, Zambia
Americas	Haiti
Asia	Bangladesh, Bhutan, Cambodia, Lao People's Democratic Republic, Myanmar, Nepal
Pacific ¹³	Kiribati, Samoa, Solomon Islands, Timor-Leste, Tuvalu, Vanuatu

Box 2: Tourism references found in Sudan's DTIS Update 2014

PILLAR 1: Tourism Policy and Governance

'The Government of Sudan recognizes the potential of tourism to contribute to development and specifically requested the DTIS Update to identify what is required to increase demand.'

'The recently updated National Tourism Plan addresses these issues and provides a useful road map for raising the profile of the sector and mobilizing resources for implementation.'

'In-country bureaucratic procedures are an impediment to the free flow of tourists. Visitors are required to register with the Ministry of Interior within three days of entering the country. Registration costs \$60 in Khartoum and can consume the better part of a day.'

'In 2004, the Ministry of Tourism, Antiquities and Wildlife developed a 25-year tourism strategy with UNWTO's technical assistance.'

PILLAR 2: Economic Performance, Investment and Competitiveness

'Perception of insecurity continues to harm tourism image. Years of civil war and social strife have resulted in a very poor tourism image for the country. This is regularly reinforced through the news media and many governments' official travel warnings. Marketing and public relations activities that are able to effectively reinsert post conflict countries onto the international tourism map are highly challenging endeavours that require effective marketing accompanied by financial resources. Yet the tourism sector in Sudan has a very modest marketing operation.'

'The DTIS identifies trade-related constraints to growth in agriculture and the services sector with specific reference to professional services and tourism.'

'The 2011 secession of South Sudan has helped create momentum towards tourism development in Sudan. First, it has contributed to a process that may lead to the onset of normalization of relations with the wider international community, which is an important step towards attracting more tourists. Second, the loss of a significant portion of its oil revenues after secession has forced the government to look at new ways to diversify the economy. Among the various options, the government has made some indications that tourism could become a greater priority.'

¹³ Timor Leste is included in the Pacific region for the purpose of this report.

PILLAR 3: Employment and Decent Work

'The tourism workforce lacks skills required by industry. Tourism business owners report that there is a significant gap between the skills that the tourism labour force currently possesses and those which they require.'

'More specifically, the existing labour force, while friendly and welcoming, does not have the necessary language and service training needed to work in the sector.'

'Two training colleges and four universities offer tourism courses, however these institutions lack qualified instructors as well as the necessary training equipment and facilities.'

PILLAR 4: Poverty Reduction and Social Inclusion

'In 2007, the Government of Sudan created a six year political plan which included a strategy for tourism. It highlights how tourism can alleviate poverty, and empower communities to protect wildlife.'

PILLAR 5: Sustainability of the Natural and Cultural Environment

'The rich cultural history and scenic attractiveness of Sudan provides ample evidence of the potential for tourism, however, realizing this potential will require a number of serious challenges to be addressed.'

'The list of goals includes increased protection of cultural heritage, establishment of more museums and monuments, creation of new nature reserves.'

Source: Sudan DTISU 2014, useful documents: <http://www.enhancedif.org/en/country-profile-sudan>

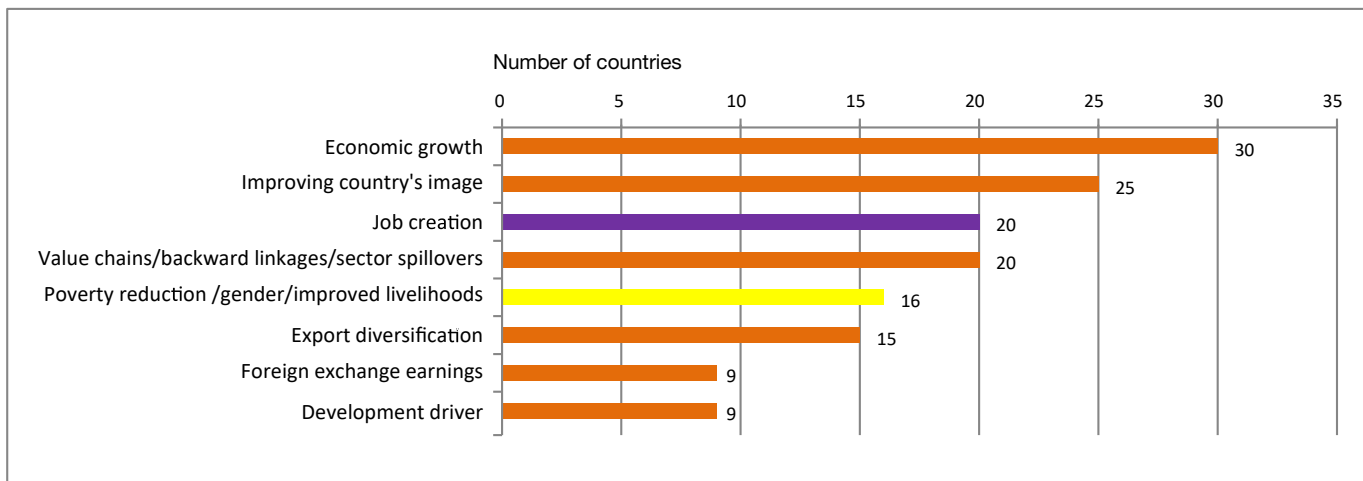
Tourism in Diagnostic Trade Integration Studies

The analysis conducted for this study reveals that 45 out of 48 DTISs analysed had tourism chapters or tourism references (32 in Africa, six in Asia, one in the Americas, six in the Pacific)¹⁴. The three countries that did not have tourism

references were Afghanistan, the Democratic Republic of Congo and Togo (see Annex 1). LDCs recognize tourism as a sector with huge potential for stimulating growth, promoting development, creating jobs, reducing poverty and improving their international reputations (Figure 1).

¹⁴ There are currently 51 EIF countries, but only 48 had completed a DTIS by the time of finalizing research for this report in 2016. Myanmar was still in the process of completing a DTIS. There were no data available yet for Equatorial Guinea, Eritrea and Somalia.

Figure 1: Number of DTIS references on how tourism can contribute to development



Source: UNWTO-EIF-ITC 2016 desk research of 48 EIF Countries with a DTIS based on the joint UNWTO-EU Guidebook "Sustainable Tourism for Development" (2013).

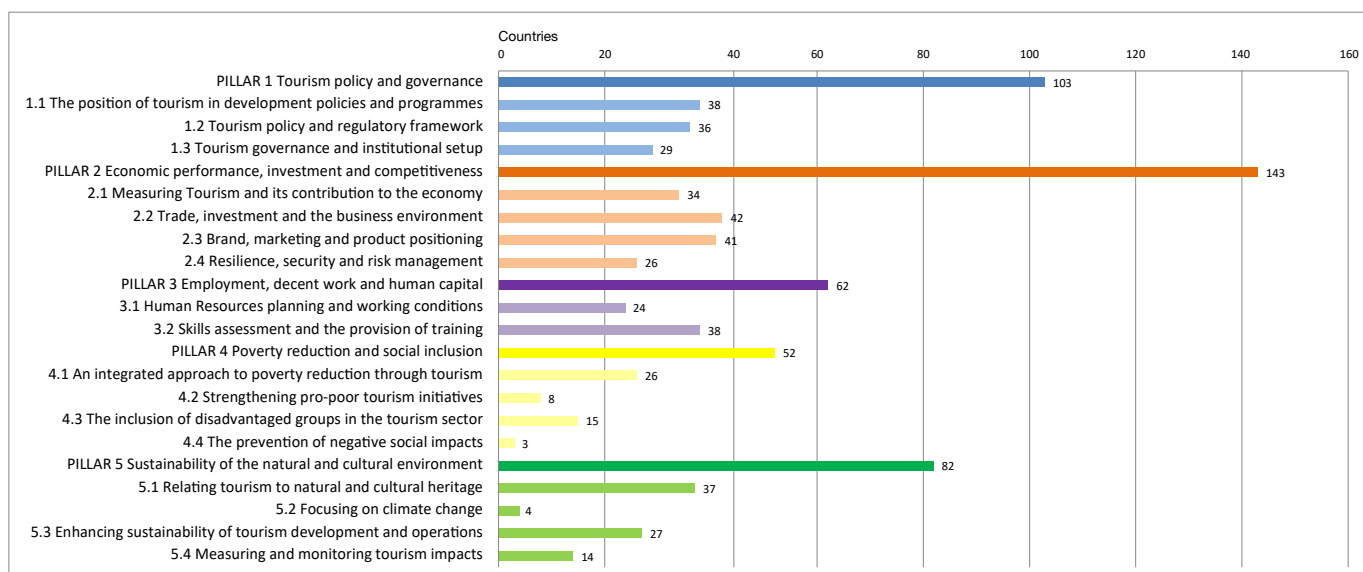
Following the Five Pillar perspective, Figure 2 shows that the distribution of references are as follows:¹⁵

- 143 references fall under Pillar 2: Economic Performance, Investment and Competitiveness
- 103 references under Pillar 1: Tourism Policy and Governance
- 82 references under Pillar 5: Sustainability of the Natural and Cultural Environment
- 62 references under Pillar 3: Employment, Decent Work and Human Capital
- 52 references under Pillar 4: Poverty Reduction and Social Inclusion.

These differences are the first indication that the Five Pillars may not be equally covered within the DTIS, pointing to the somewhat surprising initial conclusion that the employment and poverty reduction aspects of tourism – some of the sector's most beneficial aspects – are not given priority in the references.

That said, stronger performance in Pillars 1 and 2 is crucial to establish a conducive policy framework, which can have positive spillovers into Pillars 3 and 4. A total of 26 EIF countries included references to all 5 Pillars in their DTIS.

Figure 2: Number of DTIS tourism references grouped per tourism development sub-pillar



Source: UNWTO-EIF-ITC 2016 desk research of 48 EIF Countries with a DTIS based on the joint UNWTO-EU Guidebook "Sustainable Tourism for Development" (2013).

15 See Annexes 1 and 2 for more detail.

At the sub-pillar level – arguably the more relevant level of analysis considering its detail, and the fact that the Five Pillars do not each have the same number of sub-pillars – the distribution is as follows:

- 42 references to
 - Sub-pillar 2.2: Trade, investment and the business environment
- 41 references to
 - Sub-pillar 2.3: The development and promotion of the country's brand image and products;
- 38 references to
 - Sub-pillar 1.1: The position of tourism in development policies and programmes
 - Sub-pillar 3.2: Skills assessment and the provision of training
- 37 references to
 - Sub-pillar 5.1: Relating tourism to natural and cultural heritage.

Pillar 1: Tourism Policy and Governance

Sub-pillar 1.1, The position of tourism in development policies and programmes, has the largest number of references, at 38, while Pillar 1 overall has the second highest number of references. The other sub-pillars, 1.2 and 1.3, also have high numbers of references, at 36 and 29, respectively. These figures reflect the importance of tourism policy and governance within the DTIS.

Pillar 2: Economic Performance, Investment and Competitiveness

Pillar 2 has the highest number of references, which may not come as a surprise in a strategic document focusing on trade. It is worth repeating that sub-pillar 2.2, Trade, investment and the business environment, was the most mentioned of all sub-pillars, with 42 out of 48 analysed DTIS.

Of the four sub-pillars in Pillar 2, sub-pillar 2.4, Resilience, security and risk management, received the least references, at 26. This may be considered a concern, as actual and perceived risk has been found to significantly affect travellers' choice of destination in relevant literature.¹⁶ A survey conducted jointly by the Organisation for Economic Co-operation and Development (OECD), the World Trade Organization (WTO) and UNWTO also found that leading firms active in the tourism industry rank 'insecurity' as the second most important factor affecting investment decisions negatively, after 'high transport and logistics costs' (WTO-OECD-UNWTO, 2013).

¹⁶ See, for instance, Pennington-Gray et al. (2011) for references.

Pillar 3: Employment, Decent Work and Human Capital

Pillar 3 is among the least frequently referenced pillars which, to some extent, stands in contrast with the labour intensity of the sector. It is also surprising in the light of survey evidence generated through the 2013 OECD-WTO Aid for Trade Monitoring exercise that showed that developing country suppliers in the tourism industry express strong concerns about skills in the labour force.

Sub-pillar 3.2, Skills assessment and the provision of training, is frequently mentioned with 38 references. Sub-pillar 3.1, Human resources planning and working conditions, is only mentioned 24 times. This sub-pillar has two areas of concern (see Annex 1): 'The existence of a Human Resources policy, plan and actions, discussed and agreed with the private sector and other stakeholders'; and 'Ensuring that workers' rights and conditions for decent work are met'.

Pillar 4: Poverty Reduction and Social Inclusion

Pillar 4 has the least number of references in the DTIS (52 in total). This might reflect a lack of understanding of tourism's capacity to provide jobs to disadvantaged communities through its broad value chain, and a lack of concern about the need to manage potentially negative side effects from tourism. Indeed, sub-pillar 4.2, Strengthening pro-poor initiatives, is only referred to eight times throughout the examined DTIS and sub-pillar 4.4, The prevention of negative social impacts, only three times.

Pillar 5: Sustainability of the Natural and Cultural Environment

Pillar 5 received a relatively modest number of overall DTIS references, placing it third behind Pillars 1 and 2. Within this pillar, sub-pillar 5.2, Focusing on climate change, received a very low number of five references. This may come as a surprise when taking into account that tourism is a climate-dependent sector, with many destinations owing their popularity to their pleasant climate during holiday seasons.¹⁷ In this context, it is also interesting that sub-pillar 5.4, Measuring and monitoring tourism impacts, received a modest number of 14 references, while sub-pillar 2.1, Measuring tourism and its contribution to the economy, is referenced 34 times.

¹⁷ See, for instance, Amelung et al. (2007).

Tourism or sustainable tourism for LDCs?

The above analysis suggests that the economic potential and challenges of the tourism sector are well reflected in the DTIS. However, the sector is not always targeting vulnerable groups. Social and environmental challenges surrounding the sector appear to be taken into account less.

This pattern is repeated and somewhat intensified in the references that are made in the action matrices that accompany any DTIS. Action matrices outline priorities for actions to be pursued by the government in a tangible manner. The matrix also highlights areas that require the support of development partners to achieve results. As such, action matrices are a fundamental tool for the prioritization and coordination of trade-related technical assistance to LDCs.

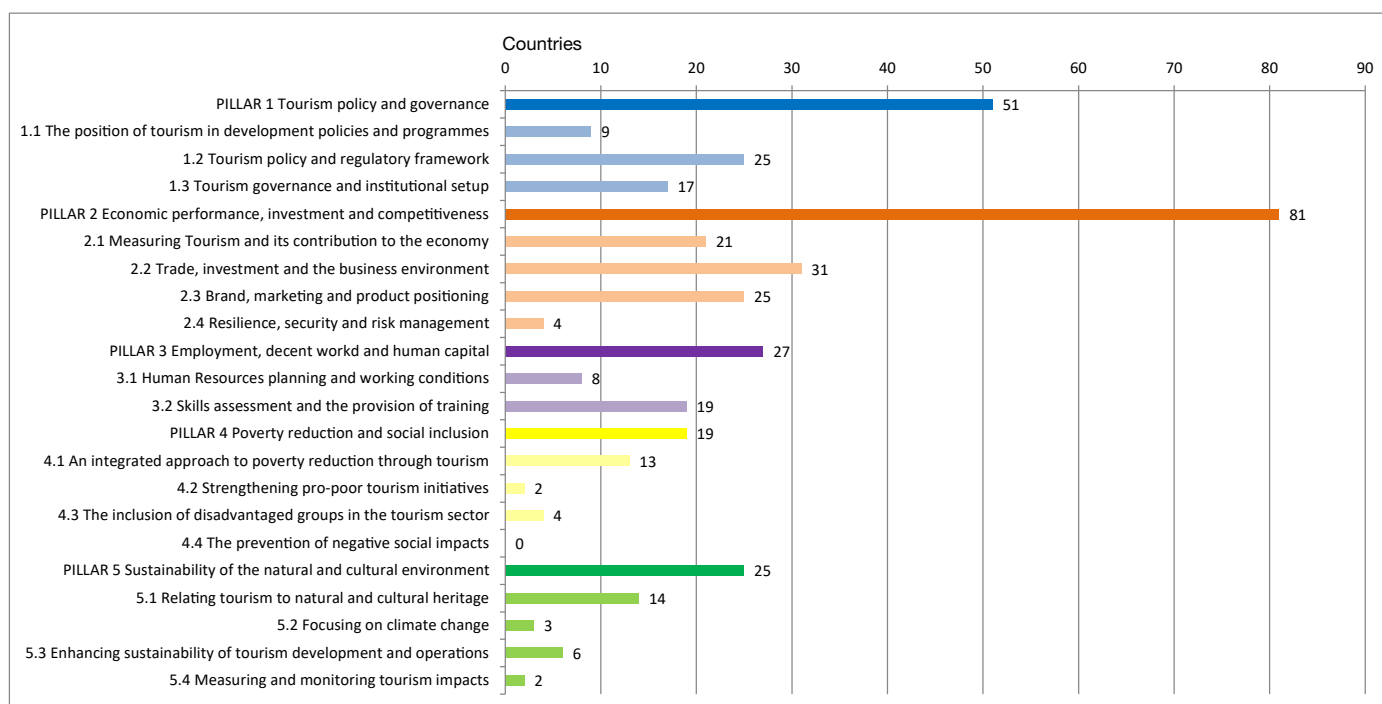
When comparing Figures 3 and 2, the distribution of priorities across the five pillars is rather similar, with the first two pillars receiving significantly more attention than the others. One important difference between the two sets of references is the strong reduction in overall references to Pillar 5, Sustainability of the Natural and Cultural Heritage.

It is now relegated to rank 4 in order of priorities and receives significantly less attention in the action matrices than Pillars 1 and 2.

The strong focus on Pillars 1 and 2 in the DTIS and its action matrices may simply be reflecting the fact that DTIS are seen as an instrument of economic planning by many stakeholders. As LDCs are at a very early stage of tourism development, policies and a conducive business environment are key for the sector to flourish, including the need for infrastructure.

It may also be a reflection of a more general challenge that lies in the difficulty of combining economic, social and environmental objectives under one umbrella. Overall, only five EIF countries (Haiti, Maldives, Mozambique, Vanuatu and Yemen) cover all five pillars in both their DTIS and action matrices. It may be useful to consider how progress on this aspect can be made to ensure social and environmental sustainability of tourism in LDCs.

Figure 3: Action matrices tourism references grouped by tourism development pillars and sub-pillars



Source: UNWTO-EIF-ITC 2016 desk research of 48 EIF Countries with a DTIS based on the joint UNWTO-EU Guidebook "Sustainable Tourism for Development" (2013).

Bringing tourism and trade stakeholders together

One of EIF's mandates is to foster local ownership of the trade agenda. The preparation of a DTIS therefore involves intensive consultations (see Box 3) with local stakeholders led

by a national implementation unit (NIU). Tourism authorities are typically among the stakeholders consulted during this process.

BOX 3: DTIS Preparation¹⁸

Both the DTIS and DTIS Update processes, respectively, are as follows:

Step 1: Submission of a DTIS request/DTIS Update proposal to the Executive Secretariat (ES), copied to the Trust Fund Manager (TFM). The submission should include:

- The chosen implementation modality (agency, government or other entity implementation);
- The designation of the main implementation entity (MIE);
- Terms of Reference for the DTIS/DTIS Update, including a clear statement of objectives, as well as a notional statement of contents and coverage (including roles and in puts of the identified stakeholders) for the DTIS/DTIS Update;
- A budget; and
- A work plan, including the expected date of completion of the forthcoming Concept Note and the draft DTIS/DTIS Update, respectively.

Step 2: Upon receipt of the request/proposal by the EIF Board or ED, depending on the situation, first consultative process resulting in a Concept Note.

- Upon approval of the DTIS request/DTIS Update proposal, the ES instructs the TFM to enter into an agreement with the MIE. The MIE carries out a mission and a first consultative process and produces a Concept Note.
- A Concept Note outlines the country's trade strategy or existing practices; the links to the Poverty Reduction Strategy Paper/national development plans and other main issues on mainstreaming; objectives and key issues of the

DTIS/DTIS Update; the approach to, and modalities of, the process; the list of local stakeholders and international/bilateral development partners who were consulted or have participated in the consultative meetings; and an outline of the consultative process and validation and dissemination of findings.

Step 3: Upon finalization of the Concept Note, main consultative process and analysis resulting in a draft DTIS/DTIS Update.

Step 4: After the time-frame for comments on the draft DTIS/DTIS Update has expired, a national validation workshop takes place.

- The ES circulates the draft DTIS/DTIS Update to the EIF Board members. The focal point will ensure to take into account relevant EIF Board members' comments together with those received as part of final in-country consultations before organizing an in-country validation workshop.

Step 5: Upon incorporation of the final comments received at the national validation workshop, finalization of the study and formal endorsement of the study by the EIF Country government.

Step 6: Communication of the endorsement by the focal point to the ES; commencement of the implementation of the priorities identified in the DTIS/DTIS Update and its action matrix.

For the purpose of this study, a survey was conducted among NIUs, national tourism authorities (NTAs) and implementing agencies (IAs) with a view on:¹⁹

- a) Assessing the extent to which the DTIS/DTIS Update process addresses the full development potential of tourism;
- b) Assessing the extent of tourism sector participation in the DTIS process;

- c) Identifying the main challenges and opportunities with regard to the capacity of LDCs in translating the DTIS action matrices into specific tourism projects for tourism-related Aid for Trade funding; and
- d) Providing an understanding of how specific tourism projects were developed and financed by the EIF.

¹⁸ DTIS Template, p. 33-36, <http://www.enhancedif.org/en/document/dtis-template>

¹⁹ See Annex 6 for the list of stakeholders that replied to the survey.

DTIS in support of multi-stakeholder dialogue on tourism

The questionnaire that was sent to NIUs and NTAs tries to assess to which extent NTAs were aware of, or are involved in, the DTIS preparatory process and to which extent the process was geared towards addressing the full development potential of tourism.

Twelve of 18 NIUs responding to the questionnaire considered the DTIS an innovative tool to analyse tourism in their country, which confirms DTIS' potential to improving awareness and knowledge of tourism in the trade community. This is important as in many countries (12 of 18 respondents) tourism is part of another line ministry than trade, or tourism is an independent ministry.

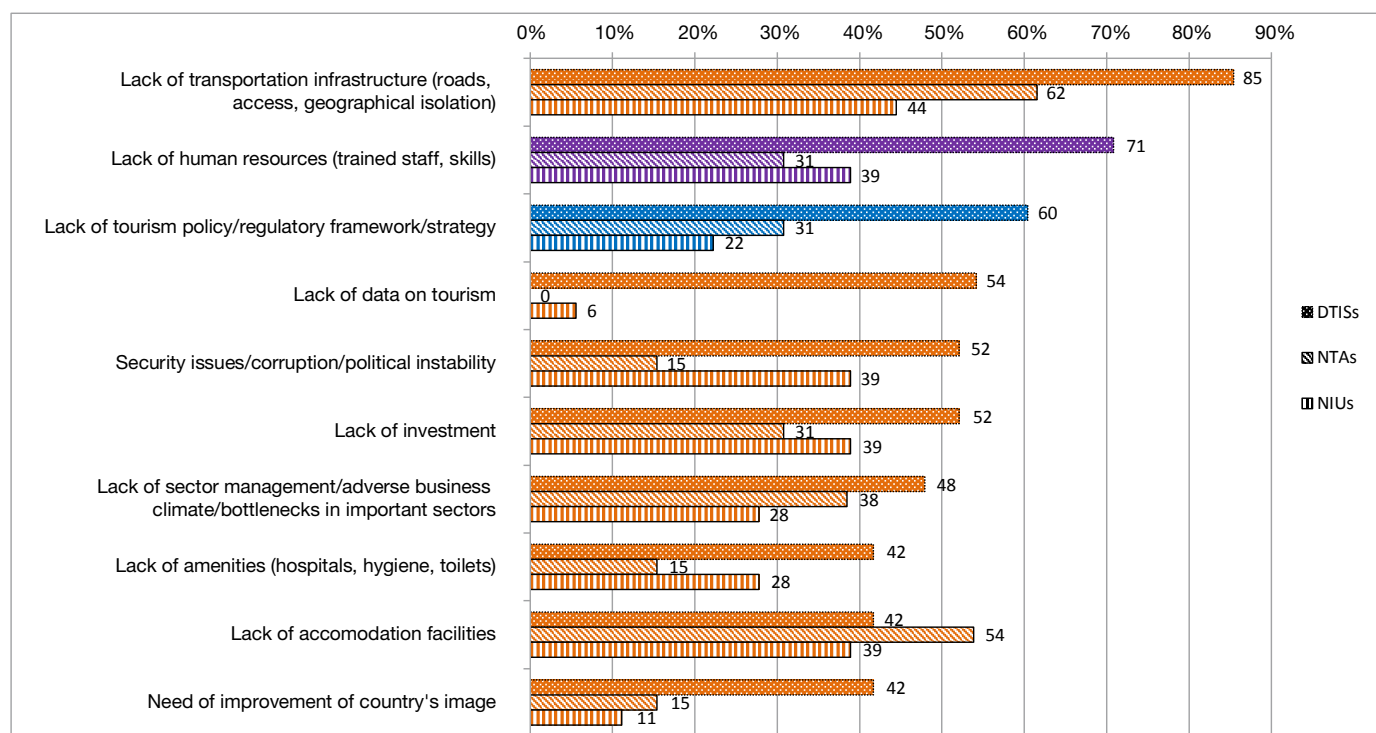
Fifteen NIUs confirmed the involvement of NTAs in the DTIS process, but only eight said NTAs were involved in all phases (in the conception, fact finding, revision and validation phases). In only six cases the NIUs considered that the DTIS and action matrices reflect well the national tourism strategy²⁰. This suggests that there is room for improvement in the coordination among trade and tourism stakeholders notably in the stage involving the definition of the action matrices.

Among the NTAs, six of 12 respondents indicated they were well or fully aware of the EIF's scope and processes taking place at country level. Half of the respondents also consider that the DTIS constitutes an innovative tool to analyse tourism in their country. This suggests that as a mechanism initiated in the trade community, the DTIS has nevertheless managed to gain traction among tourism stakeholders. More can be done in this direction, though, if the coherence between tourism and trade strategies is to be strengthened.

DTIS development and country ownership

In the questionnaire, national stakeholders were also asked to identify major technical and institutional gaps related to tourism, as well as common challenges for the development of tourism in their country. Figure 4 quantifies these according to the percentages of references in the DTIS/DTIS Updates (blue bars) and responses in NTA and NIU questionnaires (see patterns, respectively).

Figure 4: Challenges for tourism development in the LDCs



Source: UNWTO-EIF-ITC 2016 desk research of the 48 EIF Countries with a DTIS, based on the joint UNWTO/EU Sustainable Tourism for Development Guidebook' (2013). Questionnaire responses from 18 NIUs and 13 NTAs.

²⁰ For both questions, one of the countries with two respondents gave opposite answers.

The analysis shows a high degree of correlation between the priorities reflected in the DTIS and those referred to by NIUs and NTAs in the questionnaire. In line with the above, this suggests that the views of tourism stakeholders have been taken well into account in the DTIS process. It also suggests, however, that the relative lack of references to sustainability aspects, highlighted in Chapter 2 of this report, may reflect lack of attention to these aspects in both the trade and the tourism community.

While the correlation between DTIS priorities and those of national stakeholders is generally high, there are also some remarkable differences. The DTIS gives a significantly higher priority to lack of infrastructure than to other challenges. NIUs and NTAs also emphasize the lack of infrastructure, but other concerns like lack of human resources, security issues and lack of investment follow very closely in the ranking of importance.

Leveraging resources for tourism

This section looks at both current trends in allocation of ODA Aid for Trade for tourism and, more specifically, at how the EIF has provided support and resources to LDCs for the tourism sector. The stakeholder questionnaire responses provide an insight on how to better use EIF resources, and unlock LDC capacity for leveraging additional resources for tourism.

Modest international assistance to tourism

Tourism is a high-impact economic activity as well as a major job generator and a priority area for a large number of LDCs and other developing countries.²¹ Yet, financing remains an important hurdle for tourism to fully deploy its development potential and the sector is under-represented in aid flows.

ODA is defined as flows to countries and territories on the OECD Development Assistance Committee (DAC) List of ODA Recipients²² and to multilateral development institutions which are: 1) provided by official agencies, including state and local governments, or by their executive agencies; and 2) each transaction of which: a) is administered with the promotion of the economic development and welfare of developing countries as its main objective; and b) is concessional in character and conveys a grant element of at least 25% (calculated at a rate of discount of 10%).²³ Aid for Trade represents a subcomponent of ODA as further explained in Box 4.

Box 4: Defining and measuring Aid for Trade

Aid for Trade is part of Official Development Assistance (ODA) and refers to those flows aiming to support countries' efforts to develop and expand their trade as leverage for growth and poverty reduction. It encourages developing countries, governments and donors to recognize the role that trade can play in development.²⁴

In 2006, the Task Force on Aid for Trade determined that Aid for Trade comprises the following categories.²⁵ Tourism is fully eligible under each category of Aid for Trade:

- Technical assistance for trade policy and regulations (e.g. helping countries to develop trade strategies, negotiate trade agreements, and implement their outcomes);

- Trade-related infrastructure (e.g. building roads, ports, and telecommunications networks to connect domestic markets to the global economy);
- Productive capacity building, including trade development (e.g. supporting the private sector to exploit their comparative advantages and diversify their exports, agriculture, industry, tourism);
- Trade-related adjustment (e.g. helping developing countries with the costs associated with trade liberalization, such as tariff reductions, preference erosion, or declining terms of trade);
- Other trade-related needs, if identified as trade-related development priorities in partner countries' national development strategies.

Source: OECD Creditor Reporting System (CRS).

²¹ This section is derived from ITC–UNWTO Tourism and Trade: A Global Agenda for Sustainable Development, pp. 25–32. Available: <http://www.intracen.org/publication/Tourism-and-Trade-A-Global-Agenda-for-Sustainable-Development/>

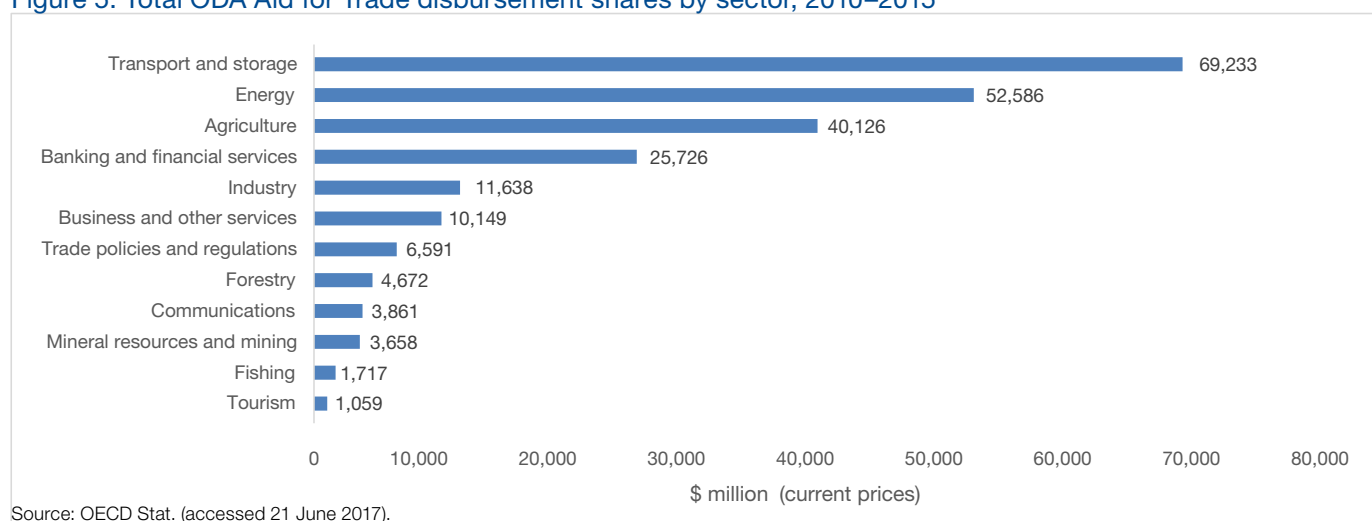
²² DAC List of ODA Recipients. Available at: <http://www.oecd.org/dac/stats/daclist.htm>

²³ Factsheet: 'Is it ODA?'. OECD, November 2008, <http://www.oecd.org/dac/stats/34086975.pdf>.

²⁴ https://www.wto.org/english/tratop_e/devel_e/a4t_e/aid4trade_e.htm.

²⁵ Report of the Task Force on Aid for Trade to the WTO General Council on 27 July 2006. https://www.wto.org/english/tratop_e/devel_e/a4t_e/implementing_par57_e.htm

Figure 5. Total ODA Aid for Trade disbursement shares by sector, 2010–2015



According to data from the OECD CRS²⁶ on commitments and disbursement of ODA, total Aid for Trade disbursements to the tourism sector were approximately \$161 million in 2015, a decline of over 18% compared with the previous year. As illustrated in Figure 5, only 0.46% of total Aid for Trade flows were directed to tourism development over the period 2010–2015. Considering that tourism constituted on average around 4% of GDP in low income countries (less than half the global average), tourism is highly under-represented in Aid for Trade flows.²⁷ However it is important to underline that Aid for Trade allocated to infrastructure is not reported under tourism in the OECD CRS.

Of course, some components of Aid for Trade flows to economic infrastructure are likely to be of relevance to tourism, agriculture and other sectors. This is to be expected, for example, for aid flows to transport infrastructure, given the role that the availability and quality of infrastructure has for inbound travel and for travel within countries. With as much as 30% of Aid for Trade expenditure on economic infrastructure directed towards

improving transport and storage, it is realistic to assume that a proportion of this will have pay-offs for the tourism sector.²⁸ Thus, it is essential that the tourism sector be fully included in decision-making for such infrastructural projects.

Under current government structures, in which many different institutions are responsible for trade, tourism, transport and infrastructure, sufficient coordination efforts do not always take place regarding the allocation of ODA. This may result in missed opportunities for leveraging tourism's development impact.²⁹

With respect to spending on productive capacity building focused on tourism, spending on LDCs has been somewhat volatile (Table 2). In 2010, total spending to LDCs constituted 30% of Aid for Trade tourism spending, whereas in both 2013 and 2014 this share declined by nearly two thirds to 13%, before returning to a high of 35%. Nevertheless, these percentages mark a departure from the trends observed from 2006–2011 where the tourism aid flows were consistently directed to upper middle income countries.³⁰

Table 2: ODA Aid for Trade disbursements by income group (\$ million)

Group	2010		2011		2012		2013		2014		2015	
	Total	(%)	Total	(%)	Total	(%)	Total	(%)	Total	(%)	Total	(%)
Least developed countries	44	30%	37	24%	30	16%	28	13%	24	13%	53	35%
Lower middle income countries	52	35%	39	25%	122	64%	93	54%	99	54%	63	41%
Other lower income countries	2.5	2%	2.3	2%	3.3	2%	0.4	1%	1.2	1%	12	8%
Upper middle income countries	50	34%	76	49%	34	18%	47	32%	57	32%	24	16%

Source: OECD Statistics (accessed 21 June 2017). Note: Currency in \$ million, current prices.

²⁶ The CRS is based on regular reporting by members of the OECD DAC and other providers of development co-operation, based on approved policy guidelines. The OECD collects, collates, and verifies the consistency of the data, and maintains the database

²⁷ 'Aid for Trade and Value Chains in Tourism', WTO-OECD-UNWTO, 2013. Available at: https://www.wto.org/english/tratop_e/devel_e/a4t_e/global_review13prog_e/tourism_28june.pdf.

²⁸ Idem.

²⁹ Idem.

³⁰ Idem.

These averages hide a significant difference across countries of allocation of disbursements. Table 3 shows that Egypt was the largest recipient of Aid for Trade for tourism, followed by

Namibia, Yemen and Ethiopia. Furthermore, of the 20 top individual recipient countries over this period, only 25% are LDCs.

Table 3: Aid for Trade Tourism disbursements to main recipients, average between 2010–2015 (\$ million)

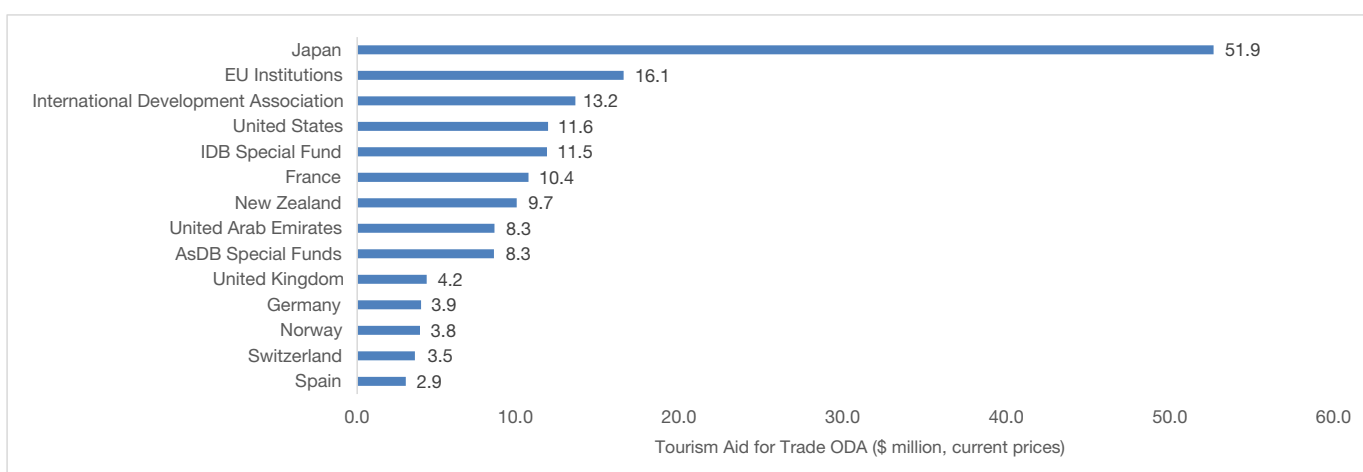
Rank	Country	Disbursements	Rank	Country	Disbursements
1	Egypt	35.5	11	Lao People's Democratic Republic	3.8
2	Namibia	11.1	12	United Republic of Tanzania	3.7
3	Yemen	8.4	13	Kenya	3.5
4	Ethiopia	6.7	14	Bolivia	3.3
5	Tunisia	6.4	15	Sri Lanka	3.1
6	Nicaragua	5.2	16	Asia, regional	2.4
7	Viet Nam	5.2	17	Papua New Guinea	2.3
8	Georgia	4.9	18	Bilateral, unspecified	2.2
9	Honduras	4.3	19	Peru	2.2
10	Niue	3.9	20	Peru	2.0

Source: OECD Statistics (accessed 21 June 2017). Note: Currency in \$ million, current prices.

The donor countries allocating the highest amounts of Aid for Trade ODA funding to tourism over the period 2010–2015 include Japan, the United States, France, New Zealand and the United Arab Emirates. Over that same period, in terms of

multilateral ODA, the major donors were EU Institutions, the International Development Association, and the Interamerican Development Bank Special Fund (see Figure 6).

Figure 6. Main donors of tourism-related Aid for Trade ODA disbursements, average per year between 2010–2015



Source: OECD Stat. (accessed 19 June 2017). Note: Currency in \$ million, current prices.

Table 4: Major ODA donors for tourism in 2015

Donor	Tourism Aid for Trade ODA (\$ million)	Total ODA (\$ million)	Tourism Aid for Trade ODA as percentage of total ODA
Japan	41.8	9203	0.45
International Development Association	37.6	-	-
New Zealand	16.4	442	3.71
IDB Special Fund	10.9	-	-
EU Institutions	10.1	13670	0.07
Asian Development Bank Special Funds	7.2	-	-
Finland	6.0	1288	0.46
Denmark	5.9	2566	0.23
Switzerland	4.4	3529	0.12
Luxembourg	2.9	363	0.79
Italy	2.4	4003	0.06

Source: OECD Statistics (accessed 19 June 2017). Note: Currency in \$ million, current prices.

Table 4 shows how much top donors spent on ODA in 2015 and how much of that was dedicated to tourism. Japan leads, having spent \$41.8 million, which constitutes 0.45% of its total ODA spending. In terms of percentage among major donors, New Zealand leads, having spent 3.71% of its ODA on Aid for Trade tourism. In total, New Zealand had 13 tourism-related entries in 2015. Projects include supporting the improvement of Cambodia's world heritage site, Angkor Park, helping Samoa tourism recover after the devastation caused by the 2013 Cyclone Evan, and helping to build a resilient tourism sector in Vanuatu.

More support through the allocation of ODA and Aid for Trade could have significant advantages for beneficiary countries. A better identification and appropriate use of Aid for Trade allocated to infrastructure for tourism development could also have important benefits. This need for scaling-up aid flows in tourism becomes even more pertinent, considering that emerging economies will soon overtake advanced economies as preferred destinations for more than half of international tourists travelling the world. Not seizing this potential could mean missing opportunities for sustainable development.³¹

Identifying bottlenecks

Evidence discussed so far in this study suggests that tourism is broadly considered to be a crucial sector for economic and in particular trade development in LDCs. It also suggests that tourism authorities are relatively well integrated in the DTIS process that identifies needs for strengthening countries' trade performance including in the area of tourism. Why is it then that the share of aid directed to the tourism sector is so low?

Institutional capacity to implement tourism-related actions

The survey analysed in this report shows that coordination with tourism authorities may be weaker in the design phase of the action matrices than in earlier stages of the DTIS process. A deeper look at the data suggests that the relationship weakens even further or breaks down completely during the implementation stage. While 13 out of 18 NIUs consider that the DTIS process allows for enough country ownership to carry out the conclusions and recommendations in view of preparing for EIF-related technical assistance aimed at building productive capacity (Tier 2 projects), only three out of 12 NTAs agree with this. Half of the NTAs consider the level of coordination between NTAs and the DTIS implementing agencies as average or below average, and only two of them consider that there is a high level of correlation between the DTIS and the country's United Nations Development Framework (UNDAF). The latter point is relevant because UNDAFs play a central role when it comes to designing technical assistance for tourism.

When asked whether the overall capacity of countries to initiate and formulate Tier 2 projects is sufficient, 10 out of 18 NIUs, but only three out of 12 NTAs agreed. The few EIF implementing agencies that replied to the questionnaire confirmed that lack of sufficient knowledge concerning project impacts and requirements is a significant and common shortfall. At least one of the seven factors – institutional capacity – determining success in overcoming trade-related challenges in LDCs as identified by the OECD and the WTO in 2015, therefore appears to not be in place (see Box 5).

³¹ 'Tourism Driving Trade, Fostering Development and Connecting People', UNWTO, 2015. <http://icr.unwto.org/publication/tourism-driving-trade-fostering-development-and-connecting-people>

Box 5: Aid for Trade for least developed countries – lessons learned

With a view to addressing trade-related challenges facing LDCs in an effective and sustained manner and based on Aid for Trade intervention on the ground, of which EIF is an integral part, the following lessons can be learned

Analytical work: Before starting any Aid for Trade intervention, it is necessary to conduct robust, evidence-based analytical work to understand the needs and priorities of the country as well as the trade-related opportunities and challenges. Diagnostic Trade Integration Studies funded by the EIF are a good example of this.

Institutional capacity: Countries with better institutional capacity tend to use Aid for Trade effectively.

Country ownership: Commitment and ownership runs right from the highest level of political leadership to the street-level bureaucrats.

Time horizon: While some reforms can be undertaken with a stroke of a pen, others require a significant time investment.

Resource requirement: Since some of the measures aimed at addressing transportation and logistics are resource-intensive, and the domestic actors – i.e. the government and the private sector – alone cannot meet these costs, donors should contribute sufficient resources to help countries achieve desired results.

Donor coordination: This is vital to avoid duplication of funding as well as achieve synergy between the support provided by various donors.

Political economy factors: In any country, vested interest groups are present, trying to thwart reforms to protect their interests.

Source: Aid for Trade at a Glance 2015: Reducing Trade Costs for Inclusive, Sustainable Growth, OECD, WTO 2015, pp. 157-158.

From trade diagnostics to strengthening tourism

Evidence collected through the survey also suggests that the existing separation between ‘trade’ and ‘tourism’ on the donor side may represent one of the challenges for moving from diagnostics to implementation.

Within the EIF framework, national donor facilitators have the role to facilitate donor coordination and the donor-government dialogue on trade issues and Aid for Trade. In each LDC, a donor representative is identified by the local government and other donors to fulfil this role.

Taking into account this role, it is worthwhile noting that responding to the survey confirmed that they initiate dialogues for funding with donors in the country, whereas NIU donor facilitators responded that they are not aware of NTA efforts in this regard. Donor facilitators also indicated that they do not use the DTIS with the purpose of seeking or leveraging additional bilateral funding for tourism

When asked for areas of improvement, donor facilitators indicated that there was need to:

- ensure alignment to each country context;
- involve stakeholders from the tourism sector to voice their concerns; and
- provide guidelines on how to take tourism into account in DTIS, thus helping stakeholders at country level to ensure that the EIF process integrates tourism-related aspects.

Box 6: Tourism leveraging in Vanuatu

Tourism is a vital sector of the economy in Vanuatu. The EIF together with the Governments of Vanuatu and New Zealand, are funding the regeneration of the port-side and seafront precincts in the capital Port Vila into a functional, safe and attractive area.

The goal is to further expand the exports of Vanuatu's fast-growing tourism industry through business expansion and the provision and distribution of related services. The Government of New Zealand, via the Ministry of Foreign Affairs and Trade, has committed to assist the Vanuatu Government to improve and expand its tourism sector. The Vanuatu Tourism Infrastructure Project is one of the main components of New Zealand's ODA support to Vanuatu.

Valued at \$18.8 million, the Vanuatu Tourism Infrastructure Project supports the implementation of Vanuatu's tourism strategy. The project will: facilitate increased tourism arrivals by 36% by 2017; increase per-capita tourism expenditure from visitors resulting in decreased urban

poverty and increased job creation for Ni-Vanuatu (Vanuatu nationals); and increase resilience to natural disasters and climate change. National implementation is supported by the Government of New Zealand. The overall objective of the project is to expand Vanuatu's GDP through increased exports and commercial activities.³²

Vanuatu's EIF Tier 2 Tourism Infrastructure Project

EIF Budget: \$3,150,000

New Zealand: \$15,650,000

Aim: to transform the seafront into a functional, safe and attractive area. Resilience to natural disasters and climate change will be improved.

The direct beneficiaries will be people, business and traders, and in particular women: about 11,000 of them are estimated to be working in the handicraft sector.

Source: <http://www.enhancedif.org/en/country-profile/vanuatu>

³² See also EIF Project supports efforts to rebuild Vanuatu's vital tourism infrastructure, 28 August 2015: <http://www.enhancedif.org/en/publication/2015-08/elf-project-supports-efforts-rebuild-vanuatus-vital-tourism-infrastructure>

Conclusions: From planning to action

The analysis of the DTIS presented in this report reveals that 45 out of 48 EIF countries have identified tourism as a key sector in their DTIS. LDCs recognize tourism as a sector with huge potential for stimulating growth, promoting development, job creation, poverty reduction and improving their international reputations.

At the end of 2016, the EIF implemented tourism projects in Burundi, Cambodia, Liberia, Sierra Leone, Solomon Islands, and Vanuatu. The number of tourism projects submitted by LDCs for EIF support might appear limited; however at the end of 2016, total EIF commitment on tourism was \$9.03 million, equivalent to 11.4% of its Tier 2 project portfolio. EIF support is important when compared to 0.46% of Aid for Trade allocated to tourism between 2010 and 2015, which is in stark contrast to the emphasis put on tourism's importance for development and the sector's capacity to contribute to the achievement of the SDGs.

New evidence included in this report provides insights into the origins of this discrepancy and into ways of addressing it. Using information from EIF's DTIS and the responses to a survey conducted for this study, the seemingly persisting disconnect between trade and tourism stakeholders at the country level, in the donor community and among implementing agencies makes it difficult to move from diagnostics to action. While the DTIS process is rather successful in bringing trade and tourism stakeholders together during the DTIS conception, this relationship weakens when it comes to the design of action matrices crucial for the implementation of any action meant to address the needs identified in the DTIS.

The trade community considers the DTIS a useful vehicle to understanding tourism-related issues, and national tourism stakeholders express the view that the DTIS is successful in triggering new and fresh thinking about tourism. Yet the DTIS is hardly used for communication with donors on tourism-related technical assistance, neither on the trade nor on the tourism side. This may be due to the fact that trade and tourism communities each have their separate mechanisms for resource allocation. Networks through which the matching between allocation of assistance and identified needs takes place may also be separate, making it difficult to handle 'trade and tourism' issues together.

From diagnostics to action: Four recommendations to strengthen the transition

There are a number of ways in which the transition from diagnostics to action could be strengthened, including:

1. Reinforcing the involvement of tourism-related institutions with trade institutions at the national level during the formulation of action matrices;
2. Raising awareness at the level of tourism ministries or relevant line ministries of the DTIS process and its relevance for fundraising.
3. Initiating donor consultations by the donor facilitator while DTIS/DTIS Update concept notes are circulated, to realistically identify expected Aid for Trade funding to be included in action matrix priorities. Donor counterparts who typically liaise with national tourism authorities should ideally be included in this process.
4. Developing sector-specific strategies as a direct follow-up to action matrix validation. In the context of tourism, this could lead to the formulation of sustainable tourism export strategies.

These proposed actions could also help address another gap that has been identified in this report: the tourism-related references in DTIS tend to focus on the economic facets of tourism and pay less attention to specific social and environmental aspects. Tourism-related needs expressed in the DTIS rarely target explicitly vulnerable communities and rarely pay attention to potential negative social or environmental side effects of tourism activities. Social and environmental aspects are important if assistance is to foster tourism that is sustainable. Closer collaboration between different stakeholders, including those in charge of environmental sustainability and poverty reduction could help.

An EIF partnership can be a powerful catalyst for leveraging Aid for Trade resources for tourism development – and the DTIS play an important role in this. A better understanding of the EIF by tourism ministries and a closer dialogue with trade ministries can lead to substantial improvements in addressing tourism related needs and thus contribute to strengthening the contribution of trade-related technical assistance to the fulfilment of the SDGs.

The EIF Phase Two combined with the celebration of the International Year of Sustainable Tourism for Development in 2017 could provide interesting avenues and opportunities for more LDCs to leverage additional resources for the development of a flourishing tourism sector that is both inclusive and sustainable, contributing to realize an ambitious 2030 Global Agenda for people and the planet.

Annexes

ANNEX 1: List of DTIS with a section dedicated to tourism

EIF countries analysed	DTIS	Mentions of tourism
Afghanistan	2012	NO
Angola	2006	√
Bangladesh	2016	√
Benin	2015	√
Bhutan	2012	√
Burkina Faso	2014	√
Burundi	2012	√
Cabo Verde	2013	√
Cambodia	2014	√
Central African Republic	2007	√
Chad	2013	√
Comoros	2015	√
Congo, Democratic Rep.	2010	NO
Djibouti	2015	√
Equatorial Guinea	NA	NA
Eritrea	NA	NA
Ethiopia	2004	√
Gambia, The	2013	√
Guinea	2016	√
Guinea - Bissau	2010	√
Haiti	2013	√
Kiribati	2010	√
Lao People's Democratic Republic	2012	√
Lesotho	2012	√
Liberia	2015	√
Madagascar	2015	√
Malawi	2014	√
Maldives	2006	√
Mali	2015	√
Mauritania	2016	√
Myanmar	2016	√
Mozambique	2015	√
Nepal	2016	√
Niger	2015	√
Rwanda	2011	√
Samoa	2010	√
Sao Tome And Principe	2013	√
Senegal	2013	√
Sierra Leone	2013	√
Solomon Islands	2009	√
Somalia	NA	NA
South Sudan	2014	√
Sudan	2014	√
Tanzania	2009	√
Timor-Leste	2011	√
Togo	2010	NO
Tuvalu	2010	√
Uganda	2013	√
Vanuatu	2007	√
Yemen	2015	√
Zambia	2015	√

* Note: NA = Not Available

ANNEX 2: List of action matrices with a section dedicated to tourism

EIF countries analysed	Region	DTIS	DTIS - Mentions of tourism	Action matrix	Action matrix - Mentions of tourism
Afghanistan	Asia	2012	NO	2012	No mentions
Angola	Africa	2006	YES	NA	NA
Bangladesh	Asia	2016	No	2016	No mentions
Benin	Africa	2015 - Update	YES	2015	Priority
Bhutan	Asia	2012	YES	2012	Priority
Burkina Faso	Africa	2014 - Update	YES	2014	Priority
Burundi	Africa	2012 - Update	YES	2012	Mentions - but not a priority
Cabo Verde	Africa	2013 - Update	YES	2013	Priority
Cambodia	Asia	2014 - Update	YES	NA	NA
Central African Republic	Africa	2007	YES	2007	Priority
Chad	Africa	2013 - Update	YES	2013	Priority
Comoros	Africa	2015 - Update	YES	2015 - Update	Priority
Congo, Democratic Rep.	Africa	2010	NO	NA	NA
Djibouti	Africa	2015 - Update	YES	2015	Priority
Equatorial Guinea	Africa	NA	NA	NA	NA
Eritrea	Africa	NA	NA	NA	NA
Ethiopia	Africa	2004	YES	2004	Priority
Gambia, The	Africa	2013 - Update	YES	2013	Priority
Guinea	Africa	2016 - Update	YES	2016	Priority
Guinea - Bissau	Africa	2010	YES	2010	Priority
Haiti	Americas	2013	YES	2013	Priority
Kiribati	Pacific	2010	YES	2010	Priority
Lao People's Democratic Republic	Asia	2012 - Update	YES	2012 - Roadmap	Priority
Lesotho	Africa	2012 - Update	YES	2012	Mentions - but not a priority
Liberia	Africa	2015 -Update	YES	2008	No mentions
Madagascar	Africa	2015 - Update	YES	2003	Priority
Malawi	Africa	2014 - Update	YES	2014	No mentions
Maldives	Asia	2006	YES	2006	Priority
Mali	Africa	2015 -Update	YES	2015	No mentions
Mauritania	Africa	2016 - Update	YES	2016 - Update	Priority
Myanmar	Asia	2016	YES	2016	Priority
Mozambique	Africa	2015- Update	YES	2015- Update	Priority
Nepal	Asia	2016 -Update	YES	2015 -Update	Mentions - but not a priority
Niger	Africa	2015 -Update	YES	2015 -Update	Priority
Rwanda	Africa	2011 - Update	YES	2011	Priority
Samoa	Pacific	2010	YES	2010	Priority
Sao Tome And Principe	Africa	2013 - Update	YES	2013	Mentions - but not a priority
Senegal	Africa	2013 -Update	YES	2013	Priority
Sierra Leone	Africa	2013 - Update	YES	2013	Mentions - but not a priority
Solomon Islands	Pacific	2009	YES	2009	Priority
Somalia	Africa	NA	NA	NA	NA
South Sudan	Africa	2014	YES	2014	Priority
Sudan	Africa	2014 - Update	YES	2014 - Update	Priority
Tanzania	Africa	2009 - Update	YES	2009	Mentions - but not a priority
Timor-Leste	Pacific	2011	YES	2011	Priority
Togo	Africa	2010	NO	2010	No mentions
Tuvalu	Pacific	2010	YES	2010	Priority
Uganda	Africa	2013 - Update	YES	2006 - Action Plan - 2013	Priority
Vanuatu	Pacific	2007	YES	2007	Priority
Yemen	Africa	2015 - Update	YES	2015	Priority
Zambia	Africa	2014 - Update	YES	2014	No mentions

Tourism mentions both in DTIS and AM	Tourism mentions only in DTIS	No mentions	DITS and AM NA
Benin	Angola	Afghanistan	Equatorial Guinea
Bhutan	Bangladesh	Congo, Democratic Rep.	Eritrea
Burkina Faso	Cambodia	Togo	Somalia
Burundi	Liberia		
Cabo Verde	Malawi		
Central African Republic	Mali		
Chad	Yemen		
Comoros	Zambia		
Djibouti			
Ethiopia			
Gambia, The			
Guinea			
Guinea - Bissau			
Haiti			
Kiribati			
Lao People's Democratic Republic			
Lesotho			
Madagascar			
Maldives			
Mauritania			
Mozambique			
Myanmar			
Nepal			
Niger			
Rwanda			
Samoa			
Sao Tome And Principe			
Senegal			
Sierra Leone			
Solomon Islands			
Sudan			
South Sudan			
Tanzania			
Timor-Leste			
Tuvalu			
Uganda			
Vanuatu			
37	8	3	3
TOTAL		51	

ANNEX 3: Tourism Tier 2 projects

EIF support to tourism (as of December 2016)

Country	Project type	Status	Budget \$ total
Cambodia	Tier 2 Tourism project	Ongoing	950,000
Sierra Leone	Tier 2 Tourism project	Ongoing	2,990,000
Solomon Islands	Tier 2 Tourism project	Ongoing	1,544,700
Vanuatu	Tier 2 Tourism project	Ongoing	3,150,000
Burundi	Tourism Feasibility Study	Ongoing	202,091
Liberia	Tourism Feasibility Study	Ongoing	199,433
Total			9,036,224

From the 2014 Annual Report:

By the end of 2014, four tourism projects had been approved by the EIF Board (three in 2014 for Cambodia, Solomon Islands and Vanuatu with several others in the pipeline). The total commitment was \$8.63 million, equivalent to 9% of the Tier 2 project portfolio.

Tier 2 projects and financial commitments, 2011–2014				
Sector	Number of Projects	Sector subtypes	Sector budget	Sector budget ratio of total (%)
Agribusiness	18	25	\$56,351,221	62
Trade facilitation	5	5	\$13,480,250	15
Standards	4	4	\$8,841,361	10
Tourism	4	4	\$8,634,700	9
Textile and apparel	2	2	\$2,865,950	3
Feasibility study	3	3	\$995,327	1
Overall Total	36	43	\$91,168,809	100

2013 Annual Progress Report

In 2013, one tourism project was approved by the EIF Board, and three projects were in the pipeline for 2014.

Number of Tier 2 projects and financial commitments, 2009–2013				
Sector	Number of Projects	Sector subtypes	Sector budget	Sector budget ratio of total (%)
Agribusiness	12	13	\$33,399,880	63
Trade facilitation	3	3	\$7,103,033	13
Standards	3	3	\$5,886,089	11
Tourism	1	2	\$3,012,425	6
Textile and apparel	1		\$2,887,445	5
Feasibility study	2	2	\$812,060	2
Overall Total	22	23	\$53,100,932	100

ANNEX 4: Template country analysis of tourism references in DTIS

DTIS	Undertaken by	DTIS	DTIS_U	1 Tourism policy and governance	1.1 The position of tourism in development policies and programmes	1.2 Tourism policy and regulatory framework	1.3 Tourism governance and institutional setup	2 Economic performance, investment, and competitiveness	2.1 Measuring Tourism and its contribution to the economy	2.2 Trade investment and the business environment	2.3 Brand marketing and product positioning	2.4 Resilience security and risk management
Angola	World Bank	2006	N/A	1	0	1	1	1	1	1	1	0
Bangladesh	World Bank	2009	2016	1	1	0	0	1	0	0	1	0
Benin	World Bank	2005	2015	1	1	1	0	1	1	1	1	1
Bhutan	UNDP	2012	N/A	1	1	1	1	1	1	1	1	0
Burkina Faso	World Bank	2007	2014	1	1	1	0	1	1	1	1	0
Burundi	World Bank	2003	2012	1	1	1	1	1	1	1	1	1
Cabo Verde	Ministry of Tourism, Industry and energy	2009	2013	1	1	1	1	1	1	1	1	1
Cambodia	UNDP	2007	2014	1	1	1	0	1	1	1	1	0
Central African Rep.	UNDP	2007	N/A	1	0	1	0	1	0	1	1	1
Chad	UNDP	2007	2013	1	0	1	1	1	1	1	1	0
Comoros	UNDP	2006	2015	1	1	1	0	1	0	1	1	0
Djibouti	UNCTAD	2004	2015	1	1	1	1	1	1	1	1	1
Ethiopia	UNCTAD	2004	N/A	0	0	0	0	1	0	1	1	0
Gambia	UNCTAD		2013	1	1	0	1	1	1	1	1	0
Guinea	World Bank	2003	2016	1	1	1	0	1	0	0	1	1
Guinea-Bissau	UNDP	2010	N/A	1	1	1	0	1	1	1	1	1
Haiti	World Bank	2013	N/A	1	1	1	0	1	1	1	1	1
Kiribati	UNDP	2010	N/A	1	1	1	1	1	1	1	1	0
Lao People's Democratic Republic	Ministry of Industry and Commerce	2004	2012	1	1	0	1	1	1	1	1	0
Lesotho	USAID	2003	2012	1	1	1	1	1	1	1	1	0
Liberia	World Bank	2008	2015	1	1	1	1	1	0	1	1	0
Madagascar	World Bank	2003	2015	1	1	1	1	1	1	1	1	1
Malawi	World Bank	2004	2014	1	1	0	0	1	0	1	1	0
Maldives	UNDP	2006	N/A	1	1	1	1	1	1	1	1	1
Mali	World Bank	2004	2015	1	1	1	1	1	0	1	1	1
Mauritania	World Bank	2001	2016	1	1	1	1	1	0	1	1	1
Mozambique	UNCTAD	2004	2016	1	1	1	1	1	1	1	0	1
Myanmar	World Bank	2016	N/A	1	0	1	1	1	1	1	1	1
Nepal	UNDP	2003	2015	1	1	1	0	1	0	1	1	1
Niger	UNCTAD	2008	2015	1	1	1	0	1	1	1	0	0
Rwanda	ITC	2005	2011	1	1	1	1	1	1	1	1	1
Samoa	UNDP	2010	N/A	1	1	1	0	1	1	1	1	1
Sao Tome and Principe	World Bank	2006	2013	1	1	1	1	1	1	1	1	1
Senegal	UNCTAD	2003	2013	1	0	1	1	1	1	0	1	1
Sierra Leone	World Bank	2006	2013	1	1	1	0	1	1	1	0	0
Solomon Islands	Ministry of Foreign Affairs and External Trade	2009	N/A	1	1	0	1	1	1	1	1	1
South Sudan	UNDP	2014	N/A	1	1	1	1	1	1	1	1	1
Sudan	World Bank	2008	2014	1	1	1	1	1	1	1	1	1
Tanzania	Ministry of Industry, Trade and Marketing	2005	2009-2013	0	0	0	0	1	0	1	1	0
Timor-Leste	World Bank	2011	N/A	1	1	0	1	1	1	1	0	0
Tuvalu	UNDP	2010	N/A	1	1	1	1	1	1	1	1	0
Uganda	World Bank	2006	2013	1	1	0	1	1	1	1	1	1
Vanuatu	UNDP	2007	N/A	1	1	1	1	1	1	1	1	1
Yemen	UNDP	2003	2015	1	1	1	1	1	1	1	1	1
Zambia	World Bank	2005	2014	1	1	1	1	1	1	1	1	1
30 Updates				103	38	36	29	143	34	42	41	26

3 Employment, decent work and capacity building	3.1 Human Resources planning and working conditions	3.2 Skills assessment and the provision of training	4 Poverty reduction and social inclusion	4.1 An integrated approach to poverty reduction through tourism	4.2 Strengthening pro-poor tourism initiatives	4.3 The inclusion of disadvantaged groups in the tourism sector	4.4 The prevention of negative social impacts	5 Sustainability of the natural and cultural environment	5.1 Relating tourism to natural and cultural heritage	5.2 Focusing on climate change	5.3 Enhancing sustainability of tourism development and operations	5.4 Measuring and monitoring tourism impacts
1	0	1	1	1	0	0	0	1	1	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0
1	1	0	1	1	0	1	0	1	1	0	1	1
1	0	1	1	1	1	1	1	1	1	0	0	1
1	1	1	0	0	0	0	0	1	1	0	0	0
1	0	1	1	0	1	1	0	1	1	0	1	0
1	0	1	1	1	0	1	0	1	1	1	1	1
1	1	1	1	0	0	1	0	1	1	0	1	0
1	0	1	0	0	0	0	0	1	1	0	1	0
1	1	1	1	1	0	0	0	1	1	0	1	0
1	1	1	0	0	0	0	0	1	1	0	1	0
1	1	1	1	1	0	0	0	1	1	0	1	1
1	0	1	0	0	0	0	0	1	1	0	1	0
1	0	1	0	0	0	0	0	1	1	0	0	0
1	1	1	1	1	0	0	0	1	1	0	1	0
0	0	0	1	1	0	0	0	1	1	0	0	0
1	1	1	1	1	0	0	0	1	1	0	1	0
1	1	1	1	1	0	1	0	1	1	0	1	0
1	1	1	1	1	0	0	0	1	1	0	1	0
1	1	1	0	0	0	0	0	1	1	0	0	0
1	1	1	1	1	1	1	0	0	0	0	0	0
1	1	1	0	0	0	0	0	1	1	0	1	1
1	0	1	0	0	0	0	0	0	0	0	0	0
1	1	1	1	1	0	0	0	1	1	0	1	0
0	0	0	0	0	0	0	0	0	0	0	0	0
1	0	1	0	0	0	0	0	1	1	0	1	0
0	0	0	1	1	0	1	0	1	1	0	1	0
1	1	1	1	1	1	1	1	1	1	0	1	1
1	0	1	1	1	0	0	0	1	1	0	0	0
1	0	1	0	0	0	0	0	0	0	0	0	0
1	1	1	0	0	0	0	0	1	1	0	1	1
1	1	1	1	1	0	1	0	1	1	0	1	0
1	1	1	1	1	0	1	0	1	1	0	1	0
1	1	1	1	1	1	1	0	1	1	0	1	1
1	1	1	1	1	1	0	0	1	1	0	1	0
0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	1	1	0	0	1
1	1	1	1	1	0	0	0	1	1	1	0	1
1	0	1	1	1	0	0	0	1	1	0	1	1
1	0	1	1	1	0	1	1	1	1	1	0	1
1	1	1	1	1	1	1	0	1	0	1	1	1
1	1	1	1	1	0	0	0	1	1	0	0	0
62	24	38	52	26	8	15	3	82	37	4	27	14

ANNEX 5: Template country analysis of tourism references in action matrices

ACTION MATRICES	Undertaken by	DTIS	DTIS_U	1 Tourism policy and governance	1.1 The position of tourism in development policies and programmes	1.2 Tourism policy and regulatory framework	1.3 Tourism governance and institutional setup	2 Economic performance, investment, and competitiveness	2.1 Measuring Tourism and its contribution to the economy	2.2 Trade, investment and the business environment	2.3 Brand, marketing and product positioning	2.4 Resilience, security and risk management
Angola	World Bank	2006	N/A	0	0	0	0	0	0	0	0	0
Bangladesh	World Bank	2009	2016	0	0	0	0	0	0	0	0	0
Benin	World Bank	2005	2015	1	0	1	1	1	1	1	0	0
Bhutan	UNDP	2012	N/A	1	1	0	0	1	1	0	1	0
Burkina Faso	World Bank	2007	2014	1	1	1	0	1	0	1	0	0
Burundi	World Bank	2003	2012	1	0	1	0	1	0	1	1	0
Cape Verde	Ministry of Tourism, Industry and energy	2009	2013	1	1	1	1	1	1	1	1	0
Cambodia	UNDP	2007	2014	0	0	0	0	0	0	0	0	0
Central African Rep.	UNDP	2007	N/A	1	0	1	1	1	1	1	1	0
Chad	UNDP	2007	2013	1	0	1	1	1	0	1	1	0
Comoros	UNDP	2006	2015	1	1	1	1	1	1	1	1	0
Djibouti	UNCTAD	2004	2015	1	0	1	0	1	0	1	1	0
Ethiopia	UNCTAD	2004	N/A	1	0	1	1	1	0	1	1	0
Gambia	UNCTAD		2013	1	0	1	0	1	1	1	1	1
Guinea	World Bank	2003	2016	1	0	1	0	0	0	0	0	0
Guinea-Bissau	UNDP	2010	N/A	1	0	0	1	1	1	1	1	0
Haiti	World Bank	2013	N/A	1	0	1	1	1	1	1	1	0
Kiribati	UNDP	2010	N/A	1	0	1	0	1	0	1	1	0
Lao People's Democratic Republic	Ministry of Industry and Commerce	2004	2012	1	0	0	1	1	1	1	1	0
Lesotho	USAID	2003	2012	1	0	1	0	0	0	0	0	0
Liberia	World Bank	2008	2015	1	0	1	0	1	1	1	1	0
Madagascar	World Bank	2003	2015	0	0	0	0	0	0	0	0	0
Malawi	World Bank	2004	2014	0	0	0	0	0	0	0	0	0
Maldives	UNDP	2006	N/A	1	0	1	0	1	1	1	1	0
Mali	World Bank	2004	2015	0	0	0	0	0	0	0	0	0
Mauritania	World Bank	2001	2016	1	0	1	1	1	0	1	0	1
Mozambique	UNCTAD	2004	2016	1	0	0	1	1	1	1	0	0
Myanmar	World Bank	2016	N/A	0	0	0	0	1	0	1	0	0
Nepal	UNDP	2003	2015	0	0	0	0	1	0	1	0	0
Niger	UNCTAD	2008	2015	0	0	0	0	0	0	0	0	0
Rwanda	ITC	2005	2011	0	0	0	0	1	0	1	0	0
Samoa	UNDP	2010	N/A	1	1	1	0	1	1	1	1	0
Sao Tome and Principe	World Bank	2006	2013	1	0	1	1	1	0	1	1	0
Senegal	UNCTAD	2003	2013	1	0	1	1	1	1	1	1	0
Sierra Leone	World Bank	2006	2013	1	1	1	1	1	1	1	1	0
Solomon Islands	Ministry of Foreign Affairs and External Trade	2009	N/A	0	0	0	0	1	1	1	1	0
South Sudan	UNDP	2014	N/A	1	0	1	1	1	1	1	1	0
Sudan	World Bank	2008	2014	0	0	0	0	0	0	0	0	0
Tanzania	Ministry of Industry, Trade and Marketing	2005	2009-2013	0	0	0	0	0	0	0	0	0
Timor-Leste	World Bank	2011	N/A	0	0	0	0	0	0	0	0	0
Tuvalu	UNDP	2010	N/A	1	1	1	0	1	1	1	1	0
Uganda	World Bank	2006	2013	1	0	1	1	1	1	1	1	1
Vanuatu	UNDP	2007	N/A	1	1	0	0	1	1	1	1	0
Yemen	UNDP	2003	2015	1	1	1	1	1	1	1	1	1
Zambia	World Bank	2005	2014	0	0	0	0	0	0	0	0	0
			30 Updates	51	9	25	17	81	21	31	25	4

3 Employment, decent work and capacity building	3.1 Human Resources planning and working conditions	3.2 Skills assessment and the provision of training	4 Poverty reduction and social inclusion	4.1 An integrated approach to poverty reduction through tourism	4.2 Strengthening pro-poor tourism initiatives	4.3 The inclusion of disadvantaged groups in the tourism sector	4.4 The prevention of negative social impacts	5 Sustainability of the natural and cultural environment	5.1 Relating tourism to natural and cultural heritage	5.2 Focusing on climate change	5.3 Enhancing sustainability of tourism development and operations	5.4 Measuring and monitoring tourism impacts
0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	1	1	0	0	0	1	1	0	0	0
0	0	0	1	0	1	1	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0
1	1	1	1	1	0	1	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0
1	0	1	1	1	0	0	0	1	1	0	0	0
1	1	1	1	0	0	1	0	1	1	0	1	0
1	1	1	0	0	0	0	0	0	0	0	0	0
1	0	1	1	1	0	0	0	0	0	0	0	0
1	1	1	1	1	0	0	0	1	1	0	0	0
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0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0
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1	0	1	0	0	0	0	0	0	0	0	0	0
1	0	1	0	0	0	0	0	1	1	0	1	0
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1	0	1	1	1	0	0	0	1	0	1	1	0
1	1	0	1	1	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0
1	1	0	0	0	0	0	0	1	0	0	0	1
0	0	0	0	0	0	0	0	1	1	0	0	0
1	0	1	1	1	0	0	0	1	1	0	0	0
1	1	1	1	1	1	1	0	1	0	1	1	1
0	0	0	0	0	0	0	0	0	0	0	0	0
27	8	19	19	13	2	4	0	25	14	3	6	2

ANNEX 6: Questionnaire responses

(National implementation units, tourism authorities, donors, implementing agencies)

#	Type	Respondent - Country	Status
1	NIU	Burundi	Complete
2	NIU	Central African Republic	Partially complete
3	NIU	Chad	Complete
4	NIU	Comoros	Partially complete
5	NIU	Congo, Democratic Republic Of The	Complete
6	NIU	Djibouti	complete
7	NIU	Gambia, The	Incomplete
8	NIU	Guinea	Complete
9	NIU	Haiti	Partially complete
10	NIU	Haiti	Complete
11	NIU	Lao Pdr	Complete
12	NIU	Lesotho	Complete
13	NIU	Liberia	Incomplete
14	NIU	Mali	Complete
15	NIU	Niger	Complete
16	NIU	Sudan	Partially complete
17	NIU	Togo	Complete
18	NIU	Tuvalu	Complete
19	NIU	Tuvalu	Complete
20	NIU	Yemen	Incomplete
#	Type	Respondent - Country	Status
1	TA	Benin	Incomplete
2	TA	Cambodia	Incomplete
3	TA	Chad	Complete
4	TA	Guinea	Incomplete
5	TA	Liberia	Complete
6	TA	Madagascar	Complete
7	TA	Maldives	Complete
8	TA	Mauritania	Incomplete
9	TA	Sao Tome And Principe	Complete
10	TA	Sao Tome And Principe	Incomplete
11	TA	Tanzania	Partially complete
12	TA	Yemen	Complete
13	TA	Zambia	Complete
#	Type	Respondent - Country	Status
1	Donor	Ethiopia - EU Delegation	Partially complete
2	Donor	Nepal - Germany EIF Donor Facilitator	Complete
3	Donor	Samoa - EIF Donor Facilitator	Complete
4	Donor	Sudan - EU Delegation	Complete
5	Donor	Togo - UNDP	Complete
#	Type	Respondent - Country	Status
1	IA	International Trade Centre	Complete
2	IA	UNDP	Complete
3	IA	UNCTAD	Complete

ANNEX 7: EIF countries' trade and tourism portfolios

Angola	MINISTRY	REMARKS
Benin	Ministry of Tourism and Hotels	Separated portfolios
Bangladesh	Ministry of Culture, Traditional Crafts, and Tourism	Separated portfolios
Burkina Faso	Ministry of Civil Aviation and Tourism	Separated portfolios
Burundi	Ministry of Culture, Tourism & Communication	Separated portfolios
Bhutan	Ministère du Commerce, de l'Industrie et du Tourisme	Joint portfolio
Cambodia	Tourism Council of Bhutan	Separated entity
Cape Verde	Ministry of Tourism	Separated portfolios
Comoros	Ministry of Tourism, Industry and Energy	Separated portfolios
Central African Rep.	Ministry of Transportation, Post, Telecommunications, Communication & Tourism	Separated portfolios
Chad	Ministry of Development, Tourism & Crafts	Separated portfolios
Djibouti	Ministry of Tourism Development	Separated portfolios
Ethiopia	Ministry of Youth, Sports, Recreation & Tourism	Separated portfolios
Gambia, The	Ministry of Culture and Tourism	Separated portfolios
Guinea	Ministry of Tourism and Culture	Separated portfolios
Guinea Bissau	Ministry of Tourism, Hotels & Handicrafts	Separated portfolios
Haiti	Ministère du Commerce et de l'Artisanat	Joint portfolio
Kiribati	Ministry of Tourism	Separated portfolios
Lao Pdr	Ministry of Communications, Transport and Tourism Development	Separated portfolios
Lesotho	Lao National Tourism Administration	Separated entity
Liberia	Ministry of Tourism, Environment & Culture	Separated portfolios
Madagascar	Ministry of Information, Culture and Tourism	Separated portfolios
Malawi	Ministry of Tourism, Environment & Culture	Separated portfolios
Maldives	Ministry of Tourism, Wildlife and Culture	Separated portfolios
Mali	Ministry of Tourism	Separated portfolios
Mauritania	Ministry of Craft Industry & Tourism	Separated portfolios
Mozambique	Ministère du Commerce, de l'Industrie et du Tourisme	Joint portfolio
Myanmar	Ministry of Tourism	Separated portfolios
Nepal	Ministry of Hotels and Tourism	Separated portfolios
Niger	Ministry of Culture, Tourism and Civil Aviation	Separated portfolios
Rwanda	Ministry of Tourism and Artisanat	Separated portfolios
Samoa	Ministry of Trade, Industry and East African Community Affairs	Joint portfolio
Sao Tome Et Principe	Samoa Tourism Authority	Separated entity
Senegal	Ministry of Trade, Industry, and Tourism	Joint portfolio
Sierra Leone	Minister du Tourisme	Separated portfolios
South Sudan	Ministry of Tourism and Cultural Affairs	Separated portfolios
Sudan	Ministry of Wildlife Conservation and Tourism	Separated portfolios
Solomon Islands	Ministry of Tourism, Antiquities and Wildlife	Separated portfolios
Timor-Leste	Ministry of Culture and Tourism	Separated portfolios
Tanzania	Ministry of Tourism, Commerce, and Industry	Joint portfolio
Tuvalu	Ministry of Natural Resources and Tourism	Separated portfolios
Uganda	Ministry of Communications, Transport and Tourism	Separated portfolios
Vanuatu	Ministry of Tourism, Wildlife and Antiquities	Separated portfolios
Yemen	Ministry of Trade, Industry and Tourism	Joint portfolio
Zambia	Ministry of Tourism, Environment & Natural Resources	Separated portfolios

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The World Tourism Organization (UNWTO) is a specialized agency of the United Nations. As the leading international organization in the field of tourism, UNWTO promotes responsible, sustainable and universally accessible tourism. It serves as a global forum for tourism policy issues and a practical source of tourism know-how. UNWTO's membership includes 157 Member States, 6 Associate Members, 2 permanent observers and 500 Affiliate Members representing the private sector, educational institutions, tourism associations and local tourism authorities



International
Trade
Centre

ITC is the joint agency of the World Trade Organization and the United Nations. ITC assists small and medium-sized enterprises in developing and transition economies to become more competitive in global markets, thereby contributing to sustainable economic development within the frameworks of the Aid-for-Trade agenda and the Global Goals for Sustainable Development.



Enhanced Integrated Framework
Trade for LDC development

The EIF is a multi-donor trust fund, which provides financial and technical support to build trade capacity in all 48 least developed countries (LDCs). The EIF is the only global Aid for Trade programme exclusively designed for LDCs and is therefore uniquely placed to assist countries to develop sustainable trade strategies, which have a positive impact on people's lives through the promotion of private sector development and job and income opportunities.