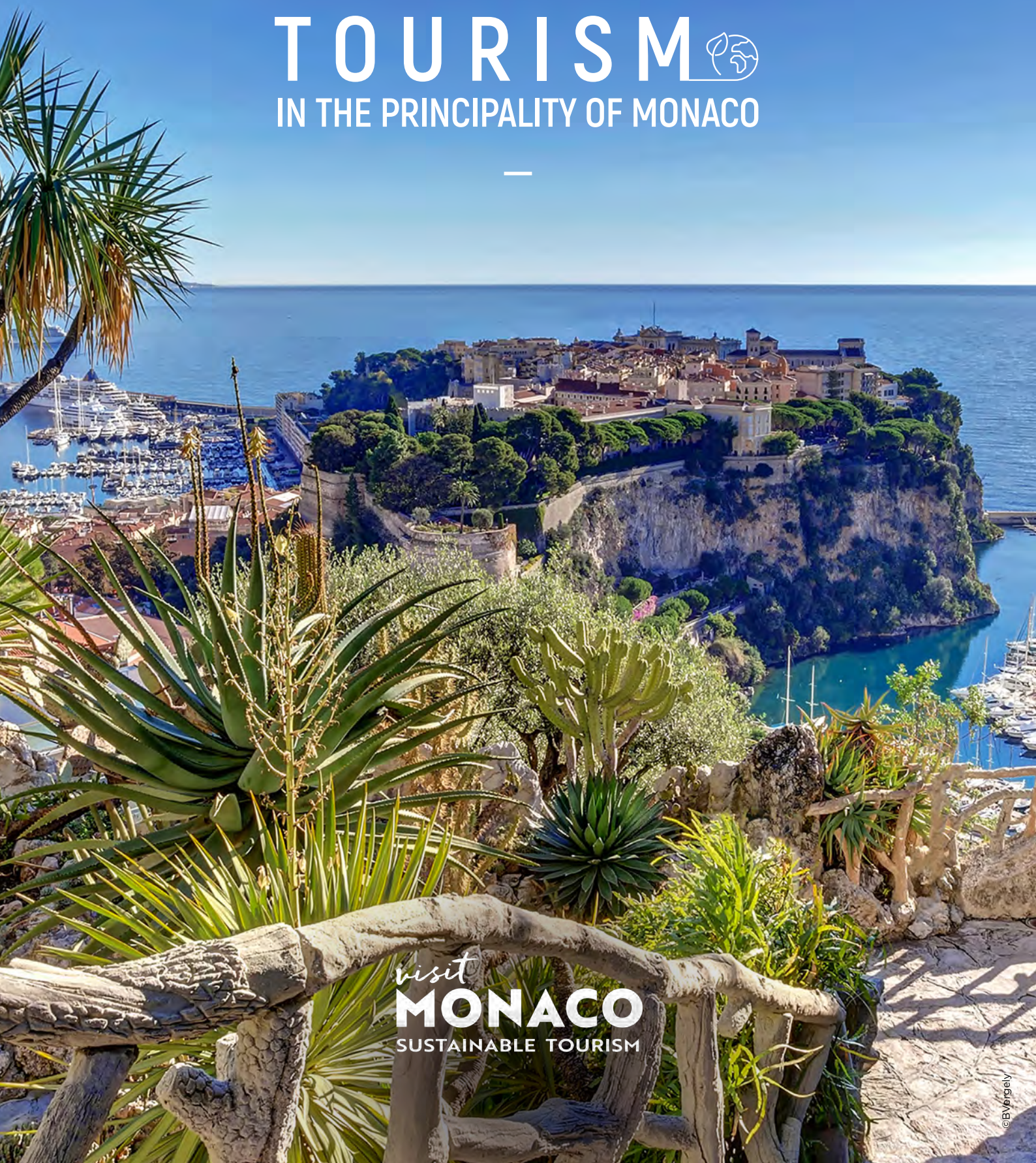


WHITE PAPER ON SUSTAINABLE TOURISM IN THE PRINCIPALITY OF MONACO



visit
MONACO
SUSTAINABLE TOURISM



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Foreword by H.S.H. Prince Albert II of Monaco



Palais de Monaco

August 2021

In recent decades, tourism has established itself as a major industry in the global economy, reflecting the growing aspirations of people in the modern world. At the same time, its sometimes dramatic impacts on our planet and its natural balances have become all too visible. Some practices have proved to be especially harmful, particularly in terms of climate change or the damage caused to ecosystems.

Despite the very real extent of this damage, it would be unfair to condemn all tourist activity. For while some forms of tourism do harm the environment, we know that adopting an outward-looking attitude, discovering the world's treasures and wondering at its beauty, are powerful ways of raising awareness about environmental issues, provided they are part of a sustainable approach.

With global tourism currently reeling from the Covid-19 pandemic and faced with the need to reinvent itself, it is vital that we gauge the environmental impact of tourist activities, promote best practices, and do all we can to ensure that when the industry recovers, it does so with a new development model, while raising public awareness about the needs of our planet.

The Principality of Monaco is acutely aware of this need, with tourism having been vitally important to our country's economy, art de vivre, and international standing for over a century and a half.

Because the Mediterranean Sea lies on our doorstep, and we know just how fragile it is, because we have a long-standing commitment to a host of environmental protection initiatives, both locally and in many other places around the world, and because we want the best for future generations, we are eager to play our part in re-inventing tourism.

For us, this is a deeply important issue, and one that addresses the needs of both the visitors we welcome today, and those we will continue to welcome in the future.

I believe this White Paper, the result of a collective effort by all of the different stakeholders in the Monegasque tourist sector, led by the Monaco Government Tourist and Convention Authority, is both a symbol and a pledge: a symbol of our shared determination, and a pledge to act, to protect the environment for future generations.



Foreword by the Secretary-General of the World Tourism Organization (UNWTO)



August 2021

Tourism is a significant part of Monaco's economy, and the preparation of this White Paper is testament to the Principality's commitment to creating a legacy that will allow for a bright future for tourism across the wider region.

Strong political leadership has allowed Monaco to build a solid reputation for safeguarding natural resources, in particular through a dedication to preserving the oceans and reducing greenhouse gas emissions. Decisive action has made Monaco a reference point in bridging the gap between luxurious and responsible tourism.

Although the COVID-19 pandemic brought international travel to an abrupt standstill, it has also served as a reminder to rethink the tourism of today to build a stronger tourism of tomorrow, one that contributes to the continued development of the economies and wellbeing of nations. On behalf of the World Tourism Organization (UNWTO), I commend the authorities of the Principality of Monaco for releasing this document during these particularly challenging times, when the focus could easily have shifted solely to the economic aspects of the recovery of the sector and its value chain.

Sustainable tourism is the future of tourism.

We must ensure that policies and actions support tourism's contribution to the achievement of the Agenda 2030 and the Sustainable Development Goals. We must honour our common heritage, protect the environment, support local economies, travel safely, and use digital platforms wisely. By doing so, we can make tourism a force for good.

Zurab Pololikashvili
Secretary-General of the World
Tourism Organization (UNWTO)



Editorial by the Director of the Monaco Government Tourist and Convention Authority

Imagining and Writing the Future of Tourism,

The idea of preparing and publishing a White Paper on Sustainable Tourism in the Principality of Monaco emerged before SARS COV 2 had even been heard of, at a time when the issues and criticism faced by the tourism industry largely focused on the negative impacts that came with its growth.

That commitment has now taken on another dimension, due to the historic impact of the health crisis on the tourism industry.

Today, there is unanimous recognition that the top priority is to kick-start tourism, and help all of the stakeholders severely affected by the crisis to stand on their own economic feet once more.

While we must alas accept that we will have to live with the consequences of this crisis for some years to come, we nonetheless have a responsibility to ensure that the recovery is also an opportunity to rebuild differently, and to take the full measure of the positive and negative impacts of this wonderful human activity.

That is why, with the support of the entire Monegasque tourism sector, the Monaco Government Tourist and Convention Authority has a duty to rethink and reinvent tourism.

The concept of sustainability itself has gradually made way for the concept of regeneration. The idea is no longer merely to minimise the negative impact of travel, but to ensure that it produces a positive economic, social and cultural impact, while benefiting visitors, stakeholders and the local population.

Fortunately, we are not starting from a blank slate. This White Paper is by no means the first brick laid in this process - the foundations were set many years ago, by the collective policies of the Principality's institutions and partners.

We are proud to present this White Paper, the product of an essential process of reflection and consultation. I have every confidence that it will quickly translate to increased efforts by all of the stakeholders concerned, and bring new momentum to the creation of a strong sustainable tourism strategy bound closely to the UN Sustainable Development Goals and the Principality's Energy Transition Objectives.

Building on everything that we have already achieved and our collective determination to persevere, we make the promise that "the future will be brighter"!

Guy Antognelli



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THE CASE FOR A WHITE PAPER ON SUSTAINABLE TOURISM IN THE PRINCIPALITY



Sustainable Tourism is not merely
a passing fad, and a multitude of
solutions are emerging.

As the world contends with far-reaching changes, particularly in climate and human health, the tourism industry - whose own impact cannot be overlooked - is becoming aware of the issues at stake, and starting to look at practical ways of moving towards a more sustainable kind of tourism.

In Monaco, all our energies are being channelled to promote human development, respect for the environment, a more balanced way of life, and increasingly sustainable tourism.

The Principality of Monaco is a City State covering 2 km². In 2020, it was home to 38,350 residents, and 55,919 workers were employed there.¹

There were 298 hospitality businesses based in Monaco in 2020, 5% of them hotels, and 95% restaurants and other F&B operators. More than 50 Destination Management Companies (DMCs) and business tourism providers are registered in the Principality². Monaco also has seven convention centres and event venues³ (excluding hotels), along with eleven major visitor attractions and museums⁴. There are 3 casinos operating, and a total of 465 retail outlets, 60% of them specialist stores. The Principality boasts a vibrant cultural scene all year round (opera, ballets, philharmonic orchestra, audiovisual institute, theatres, festivals, exhibitions, stadiums, motor racing Grands Prix, and more).

Monaco Leads The Way

The Principality of Monaco has a long-standing commitment to protecting and deepening our knowledge of the oceans and the natural world, particularly so since Prince Albert II of Monaco came to the throne.

The Monegasque Government addresses sustainable development and environmental issues through policies in four interdependent areas :

- **Energy and climate policy;**
- **Managing natural heritage and protecting biodiversity ;**
- **Actions to promote a sustainable urban and living environment ;**
- **Mobilising the support of the Monegasque community.**

As part of this approach, pro-active efforts have been made since 2017 to promote the energy transition, with the dual **target of reducing greenhouse gas emissions by 55% by 2030, and achieving carbon neutrality by 2050**. Monaco also enjoys significant international visibility and diplomatic influence in these areas. The country is committed to an international cooperation policy that puts people first (health, education, food security, socio-economic inclusion). Last, but by no means least, the Principality of Monaco works to ensure that the seas and oceans are high on the international agenda, with an ethical and sustainable vision of marine issues.

¹Sources: IMSEE • ²Source: Monaco Convention Bureau • ³Source IMSEE = Grimaldi Forum; Espace Fontvieille; Auditorium Rainier III; Espace Léo Ferré; Sporting Monte Carlo; One Monte Carlo; Salle Bellevue. • ⁴Source: DTC (non-exhaustive list) = Cars Collection of H.S.H. the Prince de Monaco; Zoological Gardens; Exotic Garden (and Caves); Museum of Anthropology and Prehistory; Naval Museum; Oceanographic Museum of Monaco; Museum of Stamps and Coins; Museum of Old Monaco; Nouveau Musée National de Monaco (Villa Sauber and Villa Paloma); Prince's Palace, Francis Bacon Foundation (open by appointment)

Tourism faced with the challenges of the 21st century

The tourism sector is directly connected to these global issues. In its own way, it contributes to greenhouse gas emissions, pollution, the depletion of energy sources and natural resources, and in some cases deepening inequalities. Yet tourism is also a powerful tool for promoting peace and growth. It brings people together, creates jobs, and showcases cultural and built heritage. It can - and must - be part of the solution. The challenge, therefore, is to **reduce tourism's negative impacts, whilst scaling up its positive effects.**

Monaco's Tourism Sector Keen To Play Its Part

Tourism is crucially important to the Principality's socio-economic vitality and global visibility. The hospitality sector was the second-largest private sector employer in Monaco in 2019, with over **8,000 workers** (not including temporary workers), and accounts for **9.1% of the country's Gross Domestic Product (GDP)**⁵. Aware of their responsibility and keen to set an example, the leading hotels and conference venues have been championing a host of environmental and sustainable development initiatives for over a decade. **Some 88% of hotel rooms** have environmental certification, and 97% have signed up to the Energy Transition Pact⁶.

The events industry has also gone green, whether in terms of the way events are organised, the venues that host them, or the content itself. The destination is also a member of the **Global Destination Sustainability Index**⁷, and despite the unprecedented situation in 2020-2021, achieved a benchmark score of **70.1%** in 2020, an improvement of 13.24% on its 2018 result.

Today, the majority of tourism operators have appointed managers or teams to take responsibility for these issues, and for the last ten years the Monaco Government Tourist and Convention Authority has been leading a Sustainable Tourism Unit, which works to raise awareness among visitors, **promote existing initiatives**, and mobilise professionals.



A Unifying Goal For The Destination

In Monaco, "sustainability" is now a key principle of tourism, a fundamental trend that has permeated the entire industry, encompassing both business and leisure tourism. The challenge now is to push ahead with the complete transformation of Monegasque tourism. That requires an objective assessment of the situation as it stands in 2020-2021, to provide a better picture of what can be done in the future to promote a resolutely respectful and innovative kind of tourism.

This overall vision is an essential part of Sustainable Tourism, and includes not just the industry's diverse professionals, both individually and collectively for the destination as a whole, but also their partners and stakeholders who make up the tourist ecosystem (customers, residents, suppliers, local authorities, etc.).

The White Paper on Sustainable Tourism in Monaco is a process. As part of that process, we have painted a picture of the current state of tourism in 2020-2021, and analysed its strengths, weaknesses, opportunities, and threats. The White Paper has mobilised all of the different stakeholders concerned. And by sharing our findings, possible avenues for improvement have emerged. **These findings will be used to define a Sustainable Tourism strategy that ties in with the UN's Sustainable Development Goals and the Principality's Energy Transition objectives.**

⁵Sources: IMSEE • ⁶Sources: Monaco Government Tourist and Convention Authority • ⁷GDS INDEX: an organisation which assesses the most sustainable tourist destinations every year based on four performance criteria (Environmental, Social, Supplier and Destination Management).



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HOW THE WHITE PAPER ON SUSTAINABLE TOURISM WAS PUT TOGETHER



A White Paper is a useful way to lay out a particular problem or issue in detail, shine a light on it and identify solutions.

To undertake this project, the Monaco Government Tourist and Convention Authority, with support from the Mission for Energy Transition and the Department of the Environment, appointed the firm François-Tourisme-Consultants, which has specialised in sustainable development solutions for the hospitality industry for over 20 years.

As a result, this White Paper is the result of a collaborative analysis that represents a step on the path to enhancing Monaco's status and leading position as a committed Destination of Excellence.

The methodology used favours a qualitative and inclusive approach. It consists of four key phases.

The Monaco Government Tourist and Convention Authority would like to thank all of the stakeholders who contributed, sharing their views and suggesting ways to further the cause of Sustainable Tourism in Monaco

PHASE 1

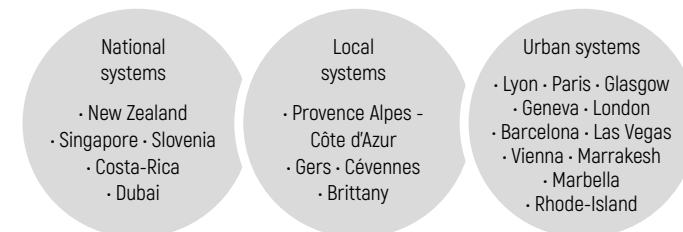
Consultation of Stakeholders

- **4 questionnaires** in French and English, to survey:
 - Residents.
 - Tourists.
 - Tourism professionals - Business leaders.
 - Tourism professionals - Employees.
- **4 workshops** held by video-conference and targeted at professionals.
- **Interviews** to gain more information from certain key stakeholders.
- **Mid-term review of findings** (during the Monaco Government Tourist and Convention Authority annual review evening).

PHASE 2

Research and Background Informations Gathering

International benchmark covering around twenty destinations, to identify best practices and areas for vigilance at the regional, national, and international levels.



PHASE 3

Data Analysis

- Analysis of data from the survey of **249 individuals**.
 - **Residents** (32%).
 - **Tourists** (17%).
 - Tourism professionals - **Leaders** (10%).
 - Tourism professionals - **Employees** (41%).
- **Compilation, prioritisation and selection** of feedback obtained from stakeholders during workshops and telephone interviews.
- **125 stakeholders attended the 4 professional workshops.**

PHASE 4

Summary and Joint Drafting of the White Paper

A review board was created to finalise this White Paper.



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SUSTAINABLE TOURISM IN MONACO TODAY



This section of the White Paper aims to provide a clear picture of the current state of Sustainable Tourism in Monaco.

Any analysis of sustainable tourism in Monaco needs first of all to consider the diverse infrastructures and services that the country has to offer in this area, led by public and private sector stakeholders committed to the approach.

Sustainable tourism in Monaco has evolved in a conducive climate, with all stakeholders on board with a clear national roadmap that enjoys the support of tourists, residents, and professionals alike, united in their commitment to more responsible tourism.

We will also look at best practices from around the world, which could serve as an inspiration for our Destination and suggest useful avenues for its future development and continuous improvement.

3.1 • High Quality Tourism Products

Monaco is a destination with a focus on **upscale tourism committed to sustainable development**. It offers **high quality, varied, and sustainable tourism products**:



CERTIFIED HOTELS



88% of hotel rooms in the Principality have **international environmental or sustainable certification**, and 97% have signed up to the Monegasque Energy Transition Pact.⁸

82% of hotel beds boasted a **4 or 5 star rating in 2020**, with an overall occupancy rate of 66% in 2019.¹⁹

100% of certified hotels have « **Green Teams** », to fly the flag for Sustainable Tourism at their venues.

RESPONSIBLE GASTRONOMY



9 stars burn bright in Monaco in the 2021 Michelin Guide¹⁰, including the first ever organic-certified gastronomic restaurant (Elsa at the Monte-Carlo Beach Hotel).

The world's **1st Green Globe** certified restaurant is located in Monaco (Le Café de Paris).

10 restaurants are part of the **Mr GoodFish** initiative for sustainable fishing.

To date, more than **29** establishments have signed up to the « **Responsible Restaurant** » scheme.

⁸ Source: Monaco Government Tourist and Convention Authority, FTC • ⁹ Source: IMSEE, Monaco Government Tourist and Convention Authority • ¹⁰ Source : Guide Michelin = 3* : Le Louis XV-Alain Ducasse à l'Hôtel de Paris. 1* : Le Blue Bay, La Table d'Antonio Salvatore au Rampoldi, Elsa Elsa (organic-certified), Le Grill, Yannick Alléno à l'Hôtel Hermitage Monte-Carlo, Yoshi



A COMMITTED MICE AND BUSINESS TOURISM SECTOR

35 495 m² of exhibition and conference space has **environmental certification** (not including hotels), some 73% of the floor area of dedicated indoor facilities in the Principality.¹¹

70.1% was Monaco's score in the **Global Destination Sustainability** Index in 2020, an improvement of 13.24% on 2018.

REEVENT the communication campaign for the **MICE** sector in Monaco, puts a major emphasis on sustainability.



PLACES OF INTEREST AND BIODIVERSITY ITINERARIES

The **N°1 tourist attraction in the Principality** (with 84,6% of museum admissions in 2019) and **3rd** most visited site on the Côte d'Azur¹², is the **Oceanographic Museum of Monaco**. It has been committed to scientific exploration and raising public awareness about the importance of preserving the seas, oceans and wildlife for over a century.

Whale Watching Monaco takes tourists on sustainable sea excursions to discover marine mammals in the Pelagos protected zone.

Public and private gardens **43 ha** or 21% of the total surface area of Monaco.

930 heritage trees make up a unique woodland trail for visitors and residents alike.



SOFT MOBILITY

80 public elevators, **37** escalators and **8** moving walkways ensure that all of Monaco's

2km² can be accessed easily on foot. Details of these mobility solutions can be found in the **Monaco Malin** brochure.

102 trains arrive at Monaco's station daily, and every year more than **6** million travellers opt for this **low carbon** mode of transport¹³.

There are over **650** electric charging points in Monaco's numerous car parks, including **154** rapid charging stations either already installed or in the process of being installed. In addition, **25** on-street parking spaces have rapid or semi-rapid charging stations. **A map of the Principality's charging stations** is regularly updated to include newly installed charging points, and shows the availability of each charging station in real-time.

The Green Travel to the Principality Guide lists all of the low-carbon solutions available for getting from Nice airport to Monaco.

A wide range of eco-friendly mobility solutions in Monaco itself: biodiesel-powered public buses (electric buses are currently being trialled), car sharing (Mabee), a public electric bicycle scheme (Monabike), and the Water Bus.

3.2 • A Favourable Local Environment

Principality of Monaco's commitment to sustainable development is driven by H.S.H. Prince Albert II of Monaco who, since his accession to the throne in 2005 and supported by His Government, has been instrumental in the country's **strong environmental policy**.

A Clear Roadmap

Effective results often depend on having a clear plan of action and a well-coordinated team responsible for implementing it. This is the case in Monaco. The Prince's Government is committed to a policy that puts sustainable development at the focus of concerns. **The energy transition goals, including reductions in greenhouse gas emissions and carbon neutrality by 2050, require everyone to play their part.**

When it comes to tourism and the environment, public-private partnerships are numerous and highly effective in Monaco. They require close coordination and on-going consultation, not just to commit the local tourism industry to a genuine, concrete transition, but also to secure Monaco's distinctive reputation as a sustainable destination, both now and in the future. The marketing strategy employed, and messaging designed to promote the Principality as a sustainable destination, are built on practical initiatives that enjoy the support of the majority of stakeholders, ensuring our local approach is both credible and consistent.

Local stakeholders share similar desires and ambitions, particularly in the areas of climate change and marine preservation.

Public Authorities Actively Working for More Respectful Tourism

The various departments of the Monegasque Government are following the destination's sustainable development roadmap. Some of the many actions being taken directly affect the tourism industry, such as:

The Department of the Environment rolls out

- **"Responsible Restaurants"** and **"Responsible Shops"** Programs, as well as **checks on air and bathing water quality in Monaco**. It promotes **soft mobility** and public transport. It also organises events to raise awareness about environmental protection.
- **The Department of Urban Amenities** ensures that the **Tree Code** is properly followed and **manages green spaces**.
- **The Mission for Energy Transition** oversees the implementation of the hotel operators' pact for the energy transition and is set to expand its work to cover other tourism stakeholders.
- **Monaco City Hall** leads the **fight against all forms of waste**. International solidarity is the responsibility of the Department of International Cooperation.
- The **Department of Cultural Affairs** works to promote **culture** and **local heritage**.
- Finally, **social issues** are mainly dealt with by the **Department of Social Welfare and Social Services**, and the Department of Employment.

¹¹ Source: IMSEE, Monaco Government Tourist and Convention Authority, FTC • ¹² Source: CRT Côte d'Azur, IMSEE • ¹³ Sources: SNCF, IMSEE

The Monaco Government Tourist and Convention Authority Leads The Way On Sustainable Tourism

The Monaco Government Tourist and Convention Authority embarked on a **Sustainable Tourism** drive as early as 2010, aiming to **inform, mobilise, and support all stakeholders in the sector**. In addition to creating a number of publications and guides, the Authority also set up a network of “**Green Teams**” and provides support for environmentally-friendly events.

An online campaign dubbed “Green is the new glam” was rolled out in 2018 and 2019, to highlight some of Monegasque tourism’s biggest sustainable strengths.

Finally, since 2017, the Monaco Government Tourist and Convention Authority has overseen monitoring of the **Global Destination Sustainability Index (GDS Index)**, the leading international index for sustainability in business tourism, in which Monaco has been achieving steadily improving results.

Today, Sustainable Tourism is a central plank of our tourism development strategy, and guides everything that the Monaco Government Tourist and Convention Authority does.

The Prince Albert II of Monaco Foundation, a Valuable Source of essential Technical and Scientific Expertise

The **Prince Albert II of Monaco Foundation** is a key player in the field of sustainable development, and works to support initiatives and new projects aimed at preserving biodiversity and the oceans, fighting climate change, and combating the waste of resources. The Foundation’s expertise, communications resources, and ability to mobilise whole communities, are priceless assets for accelerating the deployment of Sustainable Tourism actions.

Private Enterprise and the Non-Profit Sector, Partners with Concrete Commitments

It is important to emphasise the **quality of the sustainable development actions undertaken by all of Monaco’s hotel operators**, and in particular the role played by the destination’s largest tourism operator, **Monte-Carlo Société des Bains de Mer Group (SBM)**. Since 2007, SBM has been committed to a pro-active environmental and social policy based on the concept of **greener luxury**, and works to ensure these values are present in all of its services and activities.

The non-profit sector is also a key contributor to sustainable development initiatives, one example being **Monacology**, which organises environmental awareness-raising events designed to inform and educate.



Effective Public-Private Synergies

The professionals surveyed for the White Paper expressed a desire to **work more closely with the public authorities** to design and disseminate messages promoting sustainable tourism. They highlighted the **importance of urban developments, as well as tourism infrastructures and their own projects, setting the best possible environmental example**.

Finally, representatives of private enterprise see cooperation between stakeholders - private and public - as a useful means of pushing ahead with the environmental transition. They seek a **shared common environmental culture and principles, as well as consistent goals**. They plan to embark on joint projects, in some cases even pooling resources (human, financial, and technical), for example by organising grouped procurement.

- Monaco has set itself a target of reducing its greenhouse gas emissions by 55% by 2030 and achieving carbon neutrality by 2050.
- The Principality is home to some 880 plant species, including 18 heritage species.
- Monaco also has 1,600m² of urban vegetable gardens, which produce crops grown organically using biodiversity-friendly permaculture methods.
- 2 marine reserves protect around 50 ha, while a third educational managed marine area was created in 2018.
- Programmes are carried out to inventory and monitor marine and terrestrial species. They include the dusky grouper population living in Monegasque waters, which has grown from 15 to 100 individuals in the space of 20 years. The Rock of Monaco is also a refuge for peregrine falcons.
- Water quality is tested weekly in the sea bathing areas (the Solarium, Pêcheur and Larvotto beaches), between May and September. The results of the analyses are made¹⁴.

¹⁴Source: Department of the Environment

3.3 • An Initiative Supported By Tourists & Residents

Cosmopolitan customers...

Monaco is an attractive destination, both for leisure and business tourism. In 2019, the destination totalled 377,500 hotel arrivals¹⁵ and tourist spending in Monaco is twice as high as on the rest of the Côte d'Azur - at an average of €197 per day¹⁶.

... who value professional and sustainable behaviour highly, ...

The survey found that a very large majority of customers claim to have some understanding of what sustainable tourism entails. They see environmental issues as a priority (waste, use of resources, biodiversity, pollution regulations) compared with social or economic issues.

... and appreciate the destination's efforts, ...

The customers surveyed identify Monaco as a destination committed to Sustainable Tourism, and are particularly appreciative of the soft mobility services available. They are clear that the country's commitments take precedence over those of service providers. Sustainability is therefore a strong argument in favour of Monaco's appeal as a destination, and should be treated as a key priority.

... but are still waiting for targeted and committed communication

The lack of visibility for the "sustainable" side of tourism is a matter of frequent debate, rather more so than the credibility of initiatives or the potential extra costs involved. Customers expect clearer, more accessible information about the sustainability of services already available.



Residents are not familiar with every aspect of Sustainable Tourism...

Only half of the residents surveyed see the Principality of Monaco as committed to Sustainable Tourism. The efforts made by economic operators and institutional stakeholders appear to have gone largely unnoticed by the population. They name transport and soft mobility, the various sustainable certifications, and waste management and sorting, as the three most prominent initiatives.

... but appreciate the socio-economic benefits of tourism...

The Principality's residents believe tourism generates positive effects in terms of the economy and jobs, the destination's image, and also on culture and heritage. The negative impacts are focused on the environment, transportation, and to a lesser extent cleanliness.

... without necessarily suffering from overtourism

Monegasques and residents are not worried by overtourism, but are more critical of the highly seasonal nature of the industry in the Principality, with large numbers of visitors in summer, and far fewer in winter. They are more concerned with the need to improve urban traffic conditions, for example by increasing the number of park and ride facilities on the outskirts of the city, a number of which are currently under construction.

¹⁵Source: in 2019 - IMSEE, Monaco Government Tourist and Convention Authority, CRT Côte d'Azur • ¹⁶Source: On average over the period 2009 to 2018 - Source: CRT Côte d'Azur France

3.4 • Professionals Committed To The Cause

The Need for a Consistent Approach to Sustainable Tourism

The different segments of Monaco's tourist sector show varying degrees of commitment to environmental issues. Yet there are numerous eco-management systems and tools available for each of them. Here, the Principality's aim is to ensure consistency across all of the networks that make up the tourist economy: hotels, congresses, events, F&B, places of interest, shops, and so on. One possible practical solution would be to combine the main environmental indicators, whilst leaving each individual operator free to select its own benchmarks and progress at its own pace. Another could be to share the experience of the best-behaving establishments and venues, to give those just at the start of their environmental and social commitments a head start.

A Vision Focused on Environmental Themes

The main Sustainable Tourism issues identified by industry professionals tended to be focused around respect for the environment:

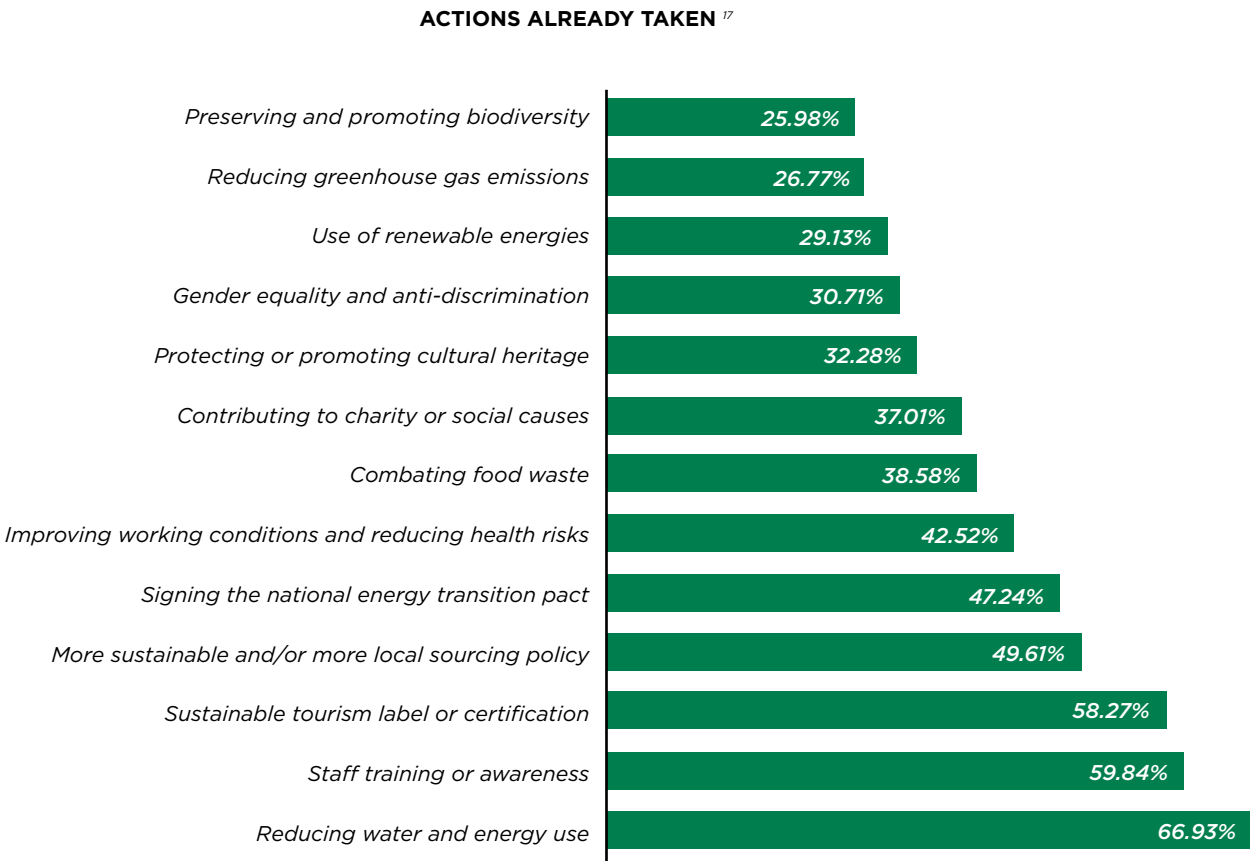
- Reducing waste, including food waste
- Sourcing locally and sustainably, including food products
- Finding the right balance between ecology, economy, and society
- Reducing the use of resources (water, energy, materials).

Other indicators mentioned, by both professionals and tourists, included the regulation of activities that generate pollution, and the preservation or promotion of biodiversity.



Initiatives Adopted by Tourism Professionals

A majority of the professionals who completed the online survey said that they had already taken various actions that were targeted and profitable (reducing water and energy use), fundamental (staff training and awareness), and also ambitious and demanding (meeting certification requirements).



¹⁷ Source: François-Tourisme-Consultants – Sustainable Tourism in Monaco Survey / January 2021.

Leaders Exist, but the Potential of the Overall Tourism Ecosystem is Yet to be Fulfilled

The professionals surveyed indicated that their sustainable initiatives had produced real benefits. Particularly in terms of lowering their costs, but also reducing waste and rallying their teams around positive values. For these professionals, the main source of motivation was to reduce the impact of their activities on the environment.

While employees and business leaders confirmed that they were actively involved with sustainable actions, they do little, if anything, to encourage their customers, suppliers, or local partners (non-profit organisations, residents, the Lycée Hôtelier high school) to take part in their initiatives. Everyone can be made aware and make their own personal contribution to the environment, the economy, and society. There is a clear need to create more synergies between tourism providers and their stakeholders, who together form a single professional ecosystem.

An Undeniable Willingness to Take Action

The vast majority of business leaders and employees surveyed expressed a desire to continue and deepen their sustainable commitments, or even to launch new initiatives. The responses reflected a widely shared intention to move forward on the environmental aspects first, before focusing on the social aspects later.

WISHLIST OF NEW COMMITMENTS ¹⁸

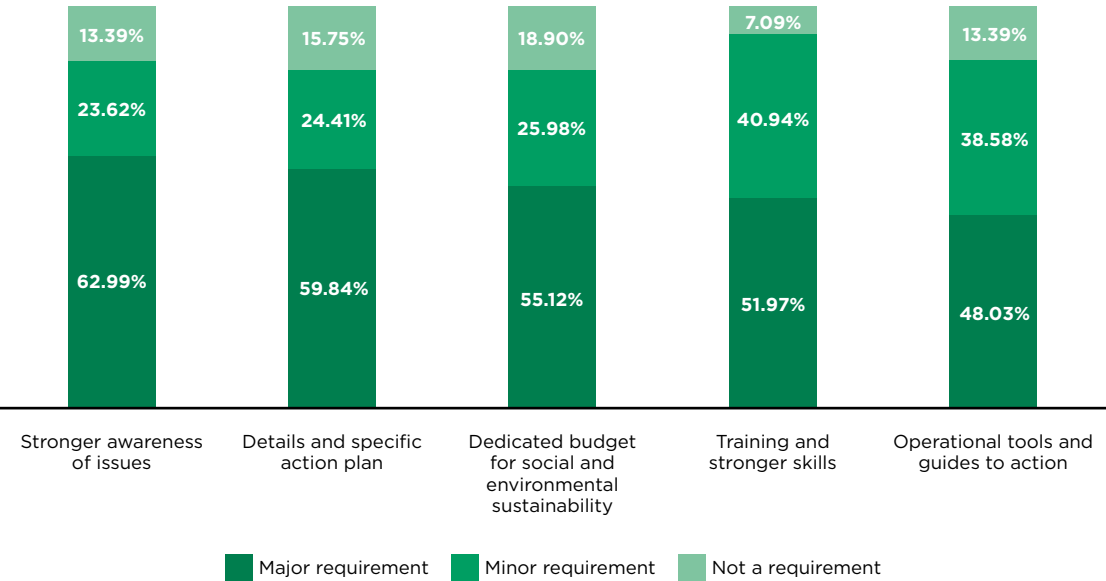


¹⁸ Source: François-Tourisme-Consultants – Sustainable Tourism in Monaco Surveys / January 2021.

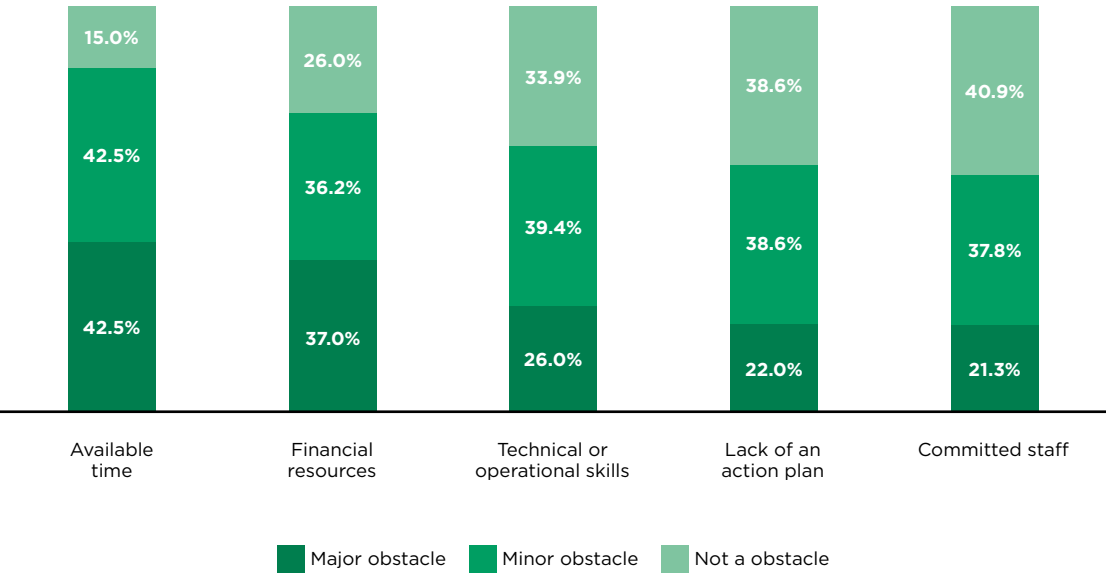
Requirements and Hurdles are Slowing the Adoption of Best Practices

The tourism professionals surveyed were asked about what they needed in order to continue with their sustainability commitments, and also about the obstacles that prevented them from moving forward. Most of the responses focused on the way businesses are organised and operate. The needs expressed included greater awareness among staff, action plans, or dedicated budgets. Meanwhile, the main obstacles identified were a lack of time, resources, or technical skills.

FIVE REQUIREMENTS FOR BEING MORE SUSTAINABLE¹⁹



FIVE HURDLES SLOWING SUSTAINABILITY ADOPTION²⁰



¹⁹ Source: François-Tourisme-Consultants – Sustainable Tourism in Monaco Surveys / January 2021.
²⁰ Source: François-Tourisme-Consultants – Sustainable Tourism in Monaco Surveys / January 2021.

3.5 • International Experience and Inspiration

An international analysis of Sustainable Tourism was carried out focusing on certain tourist countries, regions, and cities, to provide food for thought and new ideas for Monegasque projects. More and more destinations, some but not all of them competing with Monaco, are adopting the principles of sustainable tourism. This comparative study is not a competitive analysis or a ranking of the most “virtuous” destinations. Instead, it aims to **pinpoint keys to success, transferable solutions, and sources of inspiration for Monaco.**

The Study Identified 10 Keys to Success

- 1 -

International Recognition for the Destination and its Tourism Products

Sustainable development issues and values bring people and organisations together. But the strategy and working methods employed are crucially important. Without a roadmap accepted by every stakeholder, harmonious coordination will simply not be possible. The method adopted must be backed with human, financial, and technical resources commensurate with the destination’s ambitions. Those without a genuine vision merely dilute their energies and fail to provide the necessary collective impetus. If resources are lacking or reduced to any great extent, momentum is lost and the process can even come to a grinding halt. A clear strategy makes the unavoidable negotiations and trade-offs with other sectors (urban planning, development, communication, etc.) considerably easier.

- 2 -

A Clear Shared Strategy for Channelling Local Efforts

Sustainable development issues and values bring people and organisations together. But the strategy and working methods employed are crucially important. Without a roadmap accepted by every stakeholder, harmonious coordination will simply not be possible. The method adopted must be backed with human, financial, and technical resources commensurate with the destination’s ambitions. Those without a genuine vision merely dilute their energies and fail to provide the necessary collective impetus. If resources are lacking or reduced to any great extent, momentum is lost and the process can even come to a grinding halt. A clear strategy makes the unavoidable negotiations and trade-offs with other sectors (urban planning, development, communication, etc.) considerably easier.

- 3 -

An Approach Built on a Shared Culture and Actions

A consensus on shared values is essential to underpin any effective collective movement. It is unifying and vital, but on its own it is not enough. Only concrete actions can truly bind stakeholders together. That mutual culture must be built gradually, through discussions and dialogue (events, training, actions, etc.) and joint projects.

- 4 -

Leaders Who Set an Example

Organisations responsible for coordinating or leading the Sustainable Tourism movement will be appreciated for rolling out best practices across their destination and for their spirit of continuous improvement. In the various destinations studied, Offices of Tourism, regional tourist boards or national bodies that strive to set a good example (sometimes even going so far as to apply for certification) strengthen their mobilising role and the collective movement.

- 5 -

A Close Relationship between Sustainable Tourism Leaders and Stakeholders

Destinations with mediators or leaders working on the ground, in regular contact with professionals, tend to see more concrete results and achieve critical milestones more quickly. Having an organisation to listen, advise, and offer support is an invaluable aid to tourism providers as they look to transition their practices and restructure their products. Active leadership is a catalyst for a collective approach. In destinations where sustainable tourism leaders abandon their role, progress comes to a clear and abrupt halt.

- 6 -

Responsive and Visionary Public / Private Coordination

The experience analysed shows that public and private sector visions can be united around common goals for greater impact, under the guidance of the right Sustainable Tourism set-up. In operational and/or strategic working groups, a coordinated approach in which all sides play an active part gives professionals an incentive to make a long term commitment. Global governance combined with a public-private partnership is both relevant and highly effective.

- 7 -

Control over Communication and Brand Image

Optimum control over communications is crucial for promoting the destination and committed tourism industry professionals. It is a powerful way of harmonising eco-friendly tourism actions across the destination as a whole. To be truly effective, communication must be firmly positive, use a multitude of channels, but must also rely on factual information the public can easily understand.

- 8 -

Effective Tools for Rapid Progress

Shared tools to promote best practices in the area of Sustainable Tourism (benchmarks, platforms, websites, media, guides, communications, etc.) seem to be more effective when they are accessible and easy to use, suitable for demanding users, with progressive content, and, of course, smooth to implement. To ensure the range of tourism products on offer is clear and consistent, some destinations have created an overarching brand to recognise the different existing certifications, while putting safeguards in place for those which do not rely on approved international standards.

- 9 -

Training as an Opportunity for Co-creation and Green Creation

Training, whether initial or on-going, not only serves to strengthen technical or other specific skills, but also helps to foster networks and bring professionals together. It provides good opportunities for sharing and developing joint projects. This is vital for creating and structuring innovative tourism products.

- 10 -

Major Events to Unify Stakeholders and Raise the Destination’s Profile

Holding a one-off or recurring event, whether in the realm of culture, business, seasonal festivities, sports, or the environment, usually provides a highlight of the year and acts as a catalyst for the stakeholders involved, and for the destination as a whole. A major Sustainable Tourism-related event will help build the destination’s profile and incentivise all stakeholders to adopt best practices.





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- 4 -

OVERALL PERSPECTIVE



Throughout the preparation of this White Paper on Sustainable Tourism, questions were raised, experiences shared, ideas emerged, and suggestions were put forward by the participants and experts. This chapter contains a summary of them. The list is not exhaustive. Instead, it is intended to stimulate **discussion about Monaco's future Sustainable Tourism strategy and action plan.**

“Stimulating discussion about Monaco's future Sustainable Tourism strategy.”

Not all environmental questions can be answered by the White Paper, or by building a sustainable strategy. Some are inherent to tourism itself, and are equally relevant in Monaco and every other destination. They include, for example, the carbon footprint of tourists, who in Monaco are necessarily international travellers. The Principality is keen to contribute, but the technologies and solutions involved are sometimes out of reach. However, considerable efforts are still being made and could in fact be accelerated, to alter the impact of major events (such as the Formula 1 Grand Prix), or to ensure Monaco remains a destination where visitors can relax and recharge their batteries, despite the numerous construction works and dense road traffic. This is important, as the **aim for tourism stakeholders and for Monaco is to act locally in their own areas of influence**, without any hint of greenwashing whatsoever.

Given that tourism professionals tend to approach sustainable development in their own ways, the specific challenge is to unite them under a single banner. Around common goals and values based on positive, responsible, and sustainable tourism, shared tools and collective initiatives could be created. Based on those foundations, each organisation should then be able to adopt best practices and act as a catalyst. This could pave the way for **more coherent and more sustainable tourism products, perhaps even new products, to enhance the tourist experience** in Monaco.

“More coherent and more sustainable tourism products, even new products, to enhance the tourist experience.”

Stakeholders in every part of Monaco's tourism sector will be invited to take action for the environmental transition and encouraged to move forward. Real-life success stories can be highlighted, strengthening the Sustainable Tourism message for all. This positive messaging must **make responsible tourism products more visible** to tourists at every stage of the customer pathway (before, during and after their stay in Monaco), as well as to the destination's key opinion leaders. Partners in the sector - particularly suppliers and subcontractors - could be targeted to bring them on board with the movement.

The tourism stakeholders who contributed to the White Paper agree on the need to anchor Sustainable Tourism initiatives in reality. They see a **pragmatic, motivating and ambitious approach** as essential to achieve excellence. The challenge then is to build and lead a **collective movement** focused on the environment but without ignoring economic, ethical, cultural and social issues, **driven by the Monaco Government Tourist and Convention Authority** in close collaboration with industry representatives.

This movement could be built around the most relevant **United Nations Sustainable Development Goals**.

On this basis, precise goals and indicators to measure results could be approved, then periodically assessed to evaluate the progress achieved, both by individual industry professionals and the destination as a whole. This method will help to establish a **common basis for continuous improvement**, both for tourism providers and the destination.

“A common basis for continuous improvement.”



- 5 -

MONEGASQUE TOURISM AND THE UNITED NATIONS SUSTAINABLE DEVELOPMENT GOALS



Global Goals in support of Sustainable
Development (SDGs)

In September 2015, following two years of negotiations between governments and civil society, the 193 Member States of the United Nations adopted the **2030 Agenda** to eradicate poverty in all its forms and in all countries, but also to protect the planet and guarantee prosperity for all. A total of 17 specific goals were identified, covering all of the themes related to sustainable development, and now represent an international consensus.

The 17 SDGs together form a roadmap that is increasingly shaping not just public policy, but also the **Social & Environmental Responsibility** actions and initiatives of more and more businesses and organisations.

Each year, States are invited to report on the progress made on each of these 17 Sustainable Development Goals, and their 169 detailed targets.

“ Our study, based on findings from our field survey, showed that six of the SDGs have special relevance (in order): 12, 13, 14, 15, 11, and 8. ”

5.1 • How the SDGs Apply to Tourism in Monaco

The United Nations' approach is to encourage sustainable development on a planet-wide scale. Each SDG has a dominant theme, some of them social, some more focused on the economy or the environment. Of the 169 targets identified, some make direct reference to tourism (no. 8.9, no. 12.b, and no. 14.7). However, the tourism sector can make a positive contribution beyond these specific targets, for example by supporting sensible, responsible human and economic development that shows respect for nature.

When the 2030 Agenda was launched, the Principality of Monaco immediately committed to this worldwide movement. It is involved in numerous sustainable development projects and actions to promote the Sustainable Development Goals, particularly through initiatives backed by the Department of International Cooperation of the Prince's Government. For example, it supports fair trade tourism micro-projects in Tunisia and for young people in the western Mediterranean region. Similarly, Monaco's Official Development Assistance encourages training in the hotel and F&B sector in Madagascar and Mali²¹.

Not all of the challenges contained in the SDGs are applicable to Monegasque tourism and its stakeholders. The 169 targets identified in the 17 SDGs have been analysed, to determine whether they are appropriate for tourism in Monaco. Our study, based on findings from our field survey, showed that six of the SDGs have special relevance (in order): 12, 13, 14, 15, 11, and 8. By considering these Sustainable Development Goals more closely, we can pinpoint areas in which Monaco has been successful as a destination, and those where there is room for improvement

SUSTAINABLE DEVELOPMENT GOALS



²¹ Source: Monaco's Official Development Assistance



5.2 • SDG 12

ENSURE SUSTAINABLE CONSUMPTION AND PRODUCTION PATTERNS

5.2.1 • Observations and Analyses

Strengths

- Strong commitment by the main hotels, conference centres and some places of interest to environmental labels and certification.
- These structures are careful to manage and in some cases reduce their energy and water use and the amount of waste they generate.
- The luxury concept is currently being realigned with an emphasis on scarcity and efficiency, more compatible with the goals of restraint and respect for the planet. Quality over quantity.
- Government policy (**targeting “Zero Waste” for single-use plastics by 2030**), best practices (fight against waste, the “Petite Boite” doggy bag initiative, etc.), and incentives (**SMART+ scheme**, etc.) to urge stakeholders to change their consumption and working habits.

Areas for Improvements

- Shops and restaurants need to raise their level of environmental commitment.
- Lack of suitable destination-wide environmental performance indicators. This makes it difficult to introduce a collective KPI dashboard.
- Eco-responsible sourcing varies widely between professionals.

EXAMPLE

A Conference Centre Committed to International Certification

The **Grimaldi Forum** has been ISO 14001 certified since 2008. Actions taken under its in-house **Act Green** umbrella initiative have enabled the venue to:

- Reduce its energy use by **35%** from 2008 levels,
- Increase the rate of selective waste sorting by **250%**,
- Sort and recycle over **50%** of its waste,
- Cut the ratio of water used by each visitor **in half**,
- Install **2,500 m²** of roof-mounted solar panels,
- Eliminate single-use plastics (drinking straws, cups, bottles, plates, etc.),
- Obtain **100%** of its power from renewable sources.

5.2.2 • Examples of Possibles Actions

SUSTAINABLE EVENTS

- **Advise** and **support** organisers to ensure their event is as sustainable as possible.
- **Direct** support to where it is most needed, based on the organiser’s level of commitment.
- **Continue** with the GDS Index initiative and aim for a place in the top 10 destinations worldwide..

COLLECTIVE APPROACH

- **Allow** professionals to participate actively in the management of Sustainable Tourism under the aegis of the Monaco Government Tourist and Convention Authority, by creating an online platform for sharing best practices and useful information.
- **Define** common performance indicators.

- **Build** a “master benchmark”, based on existing benchmarks already used in the Principality. It will provide each organisation with the minimum environmental requirements expected of them.

WASTE MANAGEMENT

- **Raise awareness** and **encourage** stakeholders to commit to a continuous improvement approach for all tourism sectors, with the aim of promoting a circular economy.

ENVIRONMENTALLY RESPONSIBLE SOURCING

- **Arrange** for data on sustainable suppliers and sourcing to be pooled and used more intensively.



5.3 • SDG 13

TAKE URGENT ACTION TO COMBAT CLIMATE CHANGE AND ITS IMPACTS

5.3.1 • Observations and Analyses

STRENGTHS

- The Principality of Monaco has two key targets: reducing its greenhouse gas emissions by 55% from 1990 levels by 2030, and achieving carbon neutrality by 2050.
- In 2019, the Principality’s greenhouse gas emissions were estimated at 82.6 thousand tonnes, a reduction of 20% from 1990 levels 22.
- Mission for Energy Transition created to lead the roadmap and mobilise the various sectors of the economy.
- Energy Transition Pact signed by tourism professionals, including 97% of hotel operators. This gives them access to workshops, information, and practical tools for taking action.
- Significant use of alternative energy sources (ocean thermal energy, energy recovery from waste incineration, etc.) to which tourist venues are connected.
- Expansion of solar panels on the roofs of tourist venues.
- The Principality of Monaco’s energy and climate plan obtained official European Energy Award (EEA) recognition in 2014.
- Well-developed low-carbon transport network, well-suited to visitors staying in Monaco.
- Regulations on the use of heavy fuel oil by cruise ships.
- Projects under way to promote garden and biodiversity trails or access to water, to mitigate the effects of rising summer temperatures (for visitors and residents).

Areas of Improvement

- Heavy reliance on air travel to bring tourists or business travellers to Monaco (mainly via Nice Côte-d’Azur airport).
- Private cars are the other main mode of transport used by tourists. It is also one of the preferred modes of transport for people working in the tourism sector.
- Waste production and sorting errors increase greenhouse gas emissions.
- Poor thermal insulation of buildings is a major issue. The use of parasol heaters is a negative sign.

EXAMPLE

The SMART+ Scheme to Reduce Carbon Impacts

Building energy use accounted for 34% of the 87,000 tonnes of CO₂ emitted by Monaco in 2018. To speed up the reduction, hotels and communal areas of private buildings have been identified as a priority. **The SMART+ scheme**, funded by the Prince’s Government over three years, aims to equip and train these stakeholders in order to manage energy use more easily and deploy actions aimed at reducing consumption. Following a test phase at the Monte-Carlo Bay Hotel & Resort, reductions of around 10% are expected in buildings providing tourist accommodation.

With real-time monitoring of each type of energy use (heating, air-conditioning, refrigeration, ventilation, lighting, hot water, computers, etc.), unnecessary consumption can be identified and investment directed to the most efficient solutions. The approach must be completed by a range of other measures specific to each structure: improved building management, servicing preventive maintenance, replacing equipment and LED lighting, energy recovery, environmentally-friendly everyday habits and practices, renewable energies, etc.

5.3.2 • Examples of Possibles Actions

TRANSPORT AND MOBILITY

- **Continue to promote** soft mobility for all tourists, for example by creating “low carbon” products or itineraries ».

CALCULATING EMISSIONS

- **Provide** event organisers and tourists with a tool to calculate their carbon footprint to raise awareness, while also offering low carbon alternatives and ways of contributing to environmental projects supporting local organisations.



5.4 • SDG 14

CONSERVE AND SUSTAINABLY USE THE OCEANS, SEAS AND MARINE RESOURCES FOR SUSTAINABLE DEVELOPMENT

5.4.1 • Observations and Analyses

Strengths

- Strong commitment by H.S.H. Prince Albert II of Monaco to preserving the seas and oceans, developing scientific knowledge, and raising awareness about the natural riches found in these environments.
- Numerous committed Monegasque stakeholders, including the Government, the Oceanographic Institute, and the Prince Albert II of Monaco Foundation.
- Since 1976, France, Monaco, and Italy have had an agreement on scientific, technical, legal, and administrative cooperation. Under the RAMOGE agreement, the protected area is managed on an coordinated basis, with the aim of preventing threats and combatting pollution of the marine environment.
- In 2020, Monaco's port operator SEPM installed 270 terminals providing shore power for yachts and other pleasure craft, while also allowing them to take on board fresh water and discharge waste water.
- European Clean Port certification (CWA 16387) for Fontvieille and Port Hercule marinas.
- Requirements for the cruise industry (fuel quality, mandatory scrubbers) to reduce impacts during stopovers. Reduced number of stopovers (30 and 40% fewer passengers in 10 years²³), but increased quality.
- On-going regeneration of Mediterranean bluefin tuna stocks through the mobilisation and efforts of Monegasque and international stakeholders.
- Numerous restaurant owners and operators committed to sustainable consumption of local, seasonal seafood (Mr Goodfish label, MSC, etc.), while supporting the fishing industry on the Côte d'Azur and Ligurian, and oyster farming in the Principality.
- Three protected marine areas (33.6 ha at Le Larvotto; 1.9 ha at Le Tombant des Spélugues; and one educational marine area below the Oceanographic Museum). All Monaco's territorial waters are part of the "Pelagos" marine sanctuary²⁴.
- Three emblematic Mediterranean species are in good condition: a seagrass bed in the Larvotto reserve is home to over 450 noble pen shells, while the dusky grouper population has grown from 15 individuals in 1997 to more than 100 today²⁵.

Areas for Improvement

- Continued vigilance on the treatment of waste water and oily bilge water, in particular by ensuring that all play their proper part.
- Busy water sports and tourist activities on the Mediterranean Sea. Practices that respect the environment could be supported and encouraged.
- The use of harmful chemicals (hotels and restaurants, water sports) could be reduced to limit the risks of pollution or damage to human health.
- Despite restrictions on certain plastics, tourism professionals continue to use numerous products that can ultimately find their way to the sea. It is essential to mobilise providers and suppliers to combat the risk of this type of pollution.

5.4.2 • Examples of Possible Actions

PRESERVING MARINE ENVIRONMENTS

→ **Train** and **raise awareness** among professionals and tourists about actions that impact marine.

SUSTAINABLE CRUISING AND YACHTING

→ **Create** and **enforce** a Monegasque charter of best practice for these activities.

EXAMPLE

The Oceanographic Museum of Monaco, Spearheading Marine Preservation Efforts

Prince Albert I founded the **Oceanographic Institute** in 1906 to share his passion for the sea. It offers visitors in Monaco and Paris fascinating insights and the chance to learn more about the seas as natural and cultural environments. In addition to its role as an environmental mediator, the Museum is also strongly committed to reducing its everyday ecological impacts through a variety of initiatives. For example, it offers visitors the chance to buy combined tickets including admission to the museum and a train journey for two adults and two children. It is also a member of "World Aquariums #ReadyTo- Change to #BeatPlasticPollution", a coalition of more than 200 aquariums and sealife centres in 41 countries that aims to raise awareness and promote action against marine pollution.

In partnership with the Prince Albert II of Monaco Foundation, the Oceanographic Institute founded the **Monaco Blue Initiative** in 2010, which would eventually be expanded to become **Monaco Ocean Week** seven years later. These events promote exchanges between scientists, key decision-makers, NGOs, the private sector, and civil society, to accelerate the creation and adoption of sustainable solutions, as well as synergies between marine conservation and socio-economic development. A number of initiatives have emerged, such as Beyond Plastic Med (BeMed), which is now driven by a non-profit association founded in 2019 to combat marine pollution and plastic in the Mediterranean particularly.



5.5 • SDG 15

PROTECT AND RESTORE TERRESTRIAL ECOSYSTEMS

5.5.1 • Observations and Analyses

Strengths

- Some 21% of the surface area of the Principality is covered by green spaces. Around a dozen green spaces - some 26 hectares - are open to the public. There are also 17 hectares of private gardens.
- Natural spaces are one of the essential points sought after by aficionados of Sustainable Tourism.
- A total of 880 plant species, including 18 heritage species, have been identified in Monaco. They provide numerous micro-habitats for rare insects and invertebrates, as well as a pair of peregrine falcons²⁶.
- Since 2011, the "Tree Code" has regulated the management and care of plants. For example, it is prohibited to cut down any tree without permission from the Department of Urban Amenities.
- A biodiversity trail in the Saint-Martin Gardens invites visitors to discover the local species.
- Insect hotels and beehives are installed, while green spaces are maintained with limited use of chemicals.
- Urban vegetable gardens are well developed in the Principality. Under the aegis of TERRAE, for example, nearly 1,600m² of gardens produce crops grown organically using biodiversity-friendly permaculture methods, for consumption but also as part of educational projects with local schools.

Areas for improvement

- Lack of data or indicators to assess the impact of Monegasque tourism on ecosystems.
- There is not yet an equivalent of the Hotel Operators' Energy Transition Pact for the preservation and discovery of biodiversity.

EXAMPLE

Awareness Raising and Replanting Actions by the Hôtel Métropole Monte-Carlo

In 2017, two years after a fire near Menton, the **Hôtel Métropole Monte-Carlo** launched the "Mon arbre à moi" (My Tree) initiative aimed at children of the hotel's staff. In partnership with the town of Menton and the National Forestry Office, the youngsters and their parents planted 114 olive trees on the Garavan heights, to regenerate an old olive grove, while educating the participants about the specific features of Mediterranean forests.

In 2019, the Hôtel Métropole Monte-Carlo called on its staff to take part in a beach clean-up operation as part of a campaign dubbed "La mer commence ici" (The Sea Starts Here"). According to the WWF, 52% of the waste found in the Mediterranean comes from tourism. In partnership with the Town of Menton, waste was collected along the coast to make the environment cleaner and the beaches more welcoming. The initiative then also served to increase the employees' environmental awareness. Changes to the hotel's internal procedures were explained more clearly, and personnel encouraged to **adopt environmentally-friendly everyday habits** and practices, to reduce waste, including single-use plastics (drinking straws, sachets, etc.).

5.5.2 • Examples of Possibles Actions

LEARNING ABOUT TERRESTRIAL BIODIVERSITY:

- **Train** and **raise awareness** among professionals and tourists about actions that impact terrestrial biodiversity.
- **Promote** itineraries and excursions for visiting Monaco off the beaten track, with an environmental slant.

²³ Source: CRT Côte d'Azur France • ²⁴ Source: IMSEE, Department of Urban Amenities, Department of the Environment

²⁵ Source: Department of Urban Amenities, Department of the Environment

²⁶ Source : IMSEE, Direction de l'Aménagement Urbain, Direction de l'Environnement



5.6 • SDG 11

MAKE CITIES AND HUMAN SETTLEMENTS INCLUSIVE, SAFE, RESILIENT AND SUSTAINABLE

5.6.1 • Observations and analyses

Strengths

- Excellent public transport network, environmental approach and easy access for all.
- Very regular rail service with 110 trains arriving at Monaco station daily.
- Visitors are able to travel to Monaco by sea. Modern port infrastructures.
- Walking encouraged and numerous escalators and elevators available.
- Well-developed soft mobility.
- Numerous car parks and more parking facilities being developed, including charging stations.
- Significant proportion of the urban environment (21% of the Principality) given over to green spaces, with respect for plants ensured by the Tree Code.
- Efforts made to defend Monegasque culture and heritage.
- Reassuring level of safety for the public and for property.
- Air and bathing water quality are regularly monitored and of high quality.
- General satisfaction expressed by users of Monaco's railway station.
- Quality local producers (distillery, beer, oysters, chocolate, etc.).
- An economically vibrant city with excellent connections with neighbouring territories.

Areas for Improvement

- Local cost of living means relatively few hospitality industry workers are able to live on-site.
- Dense traffic in the city itself, difficulty with parking, significant commuter traffic at peak times.
- Compact urban development, numerous construction sites, land reclamation projects involving major works in a natural environment.
- Quality of reliability of rail transport somewhat unsatisfactory.
- Low level of involvement by residents in organising and developing tourism in Monaco.

EXAMPLE

Exemplarity Urban Mobility

Tourists and customers surveyed reported that the commitment to mobility and the range of products available are one of the Destination's biggest strengths: the local bus operator, **Compagnie des Autobus de Monaco**, has reduced its carbon footprint by replacing its fleet with vehicles that run on bio-diesel, complying with the EEV standard, and training its drivers in environmentally-friendly driving practices. In addition to these mobility solutions offered by CAM, a public electric bicycle scheme (**Monabike**) has been rolled out, and an electric water bus runs on solar power.

The **Monapass** app covers all of CAM's services (journey planning, reservations, payment, timetables, etc.) and will shortly be expanded to include car-sharing and public car parks.

Almost all of CAM's buses are equipped with a ramp allowing wheelchair access, and spoken announcements for the visually-impaired.

Additional services are being developed by private firms, including electric or hybrid taxis and limousines (**ELIMO**), electric car sharing (**MOBEE**), parking solutions with almost 40 public car parks, and increasing numbers of charging stations.

5.6.2 • Examples of Possible Actions

LINKS BETWEEN TOURISM AND THE LOCAL ECONOMY

→ **Promote** existing environmentally responsible goods and services in the Principality. **Encourage** people to buy local and support local producers.

CULTURE, HISTORY, AND HERITAGE

→ **Consider** how tourism could support culture and heritage stakeholders in the post-Covid economic climate.
→ Do more to **showcase** Monegasque culture for greater visibility with tourists, and make it a key tourism argument as it is unique to Monaco and cannot be moved or outsourced.

SUSTAINABLE DEVELOPMENT AND TOURISM LABORATORY

→ **Assess** residents' views of tourism regularly
→ **Consider** creating a Sustainable Tourism observatory, taking inspiration from work done by international organisations (UNWTO, European Travel Commission).

TOURIST TAX

→ **Introduce** a tourist tax and ringfence the revenue raised for the development of Sustainable Tourism.



5.7 • SDG 8

PROMOTE SUSTAINED, INCLUSIVE AND SUSTAINABLE ECONOMIC GROWTH, FULL AND PRODUCTIVE EMPLOYMENT AND DECENT WORK FOR ALL

5.7.1 • Observations and analyses

Strengths

- Steady tourism revenue growth until 2020.
- Continuing rise in quality and prestige, and hotel refurbishments.
- Monte-Carlo Société des Bains de Mer Group, the leading private tourism employer, places high importance on working conditions and respect for the environment.
- Wide range of tourist activities available across the destination, making the sector more resilient.
- Preventive and awareness-raising actions to improve working conditions.
- Casinos taking action to combat the risk of gambling addiction.
- Several economic and social shock-absorbers (including the CCTR or strengthened provisions for total temporary layoff, with furlough payments to 96% of businesses in the hospitality industry²⁷) have helped to mitigate the impact of the Covid-19 pandemic on Monaco and tourism companies.

Areas for Improvement

- Number of disabled workers in the Monegasque tourism sector unknown.
- No information on differences in pay between men and women in equivalent roles with equivalent responsibilities.
- Highlight the contribution made by the real value of Tourism to Monaco's economy.

EXAMPLE

The Importance of Tourism to Monaco's Economy

Hospitality industry in **Monaco** = **9.1% of Monegasque GDP** (513.6 million euros in 2019). The sector is the fifth-largest contributor to the Principality's GDP.²⁸

Hospitality revenue = **808 million euros** in 2019 (72% from hotels).²⁹

Hospitality industry in Monaco = 14.1% of jobs (not including temps) in the Principality in 2019. The sector is Monaco's second-largest employer.

Tourism is the second-largest user of temporary employment with 20% (behind the construction industry on 40%). Eight out of ten temporary jobs are in catering.³⁰

Just 31% of hospitality employees in 2018 were women (54% in the retail sector). The average age of employees is 36.3 years in F&B and 41.2 years in hotels, compared with an average of 42 for the private sector in Monaco³¹.

NB : Worldwide, tourism represents 10.4% of GDP and 10% of jobs³². In the Principality, this sector is an economic engine, but also a powerful means of promoting integration and personal development.

5.7.2 • Examples of Possible Actions

ACCESSIBILITY FOR ALL

→ **Strengthen** best practices and continue to improve infrastructures with the aim of achieving 100% accessibility.

IMPORTANCE ECONOMIQUE DU TOURISME

→ **Calculate** tourism GDP.

GENDER EQUALITY

→ **Work** closely with the Women's Rights Officer to ensure that her coordinating role and national measures are applied across the tourism sector.

²⁷Source: IMSEE, Caisses Sociales de Monaco • ²⁸Source: IMSEE, Caisses Sociales de Monaco • ²⁹Source: IMSEE, Department of Tax Services

³⁰Source: Temporary Employment Agencies, IMSEE • ³¹Source: IMSEE, Caisses Sociales de Monaco • ³²Source: ILO, WTTCC

5.8 • Suggestions for Other SDGs

In addition to the six SDGs identified as most relevant for Monegasque tourism, a number of proposals for action were identified during the preparation of this White Paper. They add to the broad panel of inspiring initiatives for the future of tourism in the Principality of Monaco.



- **Encourage Training for Future Tourism Professionals** in Sustainable Tourism and best practices.
- **Include** specific classes on the curriculum for students in each year at the Lycée Technique et Hôtelier de Monaco.
- **Support on-going training for employees** in sustainable development actions in Monaco and at venues and establishments. Offer inter-company workshops.



- **Promote** cool areas of Monaco by creating a **“naturally refreshing” itinerary** (green spaces, areas with mist spray but no air-conditioning, water features, bathing spots, etc.).
- **Combine** this information in a free app or **interactive map**, with other geotagged data (electric car charging stations, public restrooms, viewpoints, remarkable trees, etc.).



- **Educate** tourism stakeholders about **sustainable digitalisation**, to limit digital pollution and encourage the use of ethical or low environmental impact technologies.



- **Continue**, assess, and build up **international solidarity and charity actions by tourism stakeholders**. Some initiatives could be pooled between multiple establishments (skills-based philanthropy, donations, volunteer leave, etc.).
- **Argue** that Sustainable Tourism, especially in the city-state of Monaco, is a way of **promoting peace and mutual respect**, like sport,



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FOLLOWING THROUGH WITH CONCRETE ACTIONS



"In the Beginning was the Act"...

Johann Wolfgang von Goethe - Faust, 1770

From tourism for exploration and discovery, fifty years ago, to mass tourism more recently, we are now moving towards a kind of **tourism focused on high standards**. Those high standards are reflected not just in its investment and management models, but in its new values. The phenomenon can be seen clearly in the world's very best destinations: tourism in the future will be inclusive, mutually supportive, fair, participatory, and sustainable. That gives new meaning to what tourism is about. It is an approach ideally suited to Monaco, as both a holiday resort and a business and events centre, a global meeting place and a place of tradition and history.

Feedback given during a workshop on the future of tourism in Monaco, in January 2021:

"Destination Monaco has a head start in Sustainable Tourism, but many others are now starting move more quickly. We need to redouble our efforts to stay with the leaders. »

Monegasque tourism stakeholders and their partners together form an ecosystem committed to moving faster on environmental issues, both in their everyday practices, and in the tourism products and services available in the Principality. With their complementary experience, these professionals are keen to cooperate, to ensure the destination continues to adopt sustainable solutions and to position Monaco clearly as a global leader of inclusive tourism that respects the planet and all life on it.

More than "sustainable", the ethos of tourism in the Principality of Monaco aims to be socially beneficial and fundamentally regenerative. While remaining a luxury destination associated with the very highest quality, Monaco's tourism sector wants to make a clear and effective contribution to improving living standards for all.

By re-inventing the meaning of luxury, with a focus on environmental and social values, Monaco aims to make its entire tourism industry **part of a progressive approach that addresses the challenges of the 21st century**. The challenge is to guarantee visitors a stay that is made truly unforgettable by its contribution to nature and our well-being. The customer experience, currently central to destination marketing, is being remodelled as a healthy living, peaceful experience that creates a sense of wellness. The path is demanding and ambitious, but necessary if Monegasque tourism is to develop in a thoughtful, effective, and sustainable way.

In practice, it will require **all professionals to play their part**, along with their main suppliers and stakeholder, if we are to renew our tourism together. Stakeholders and projects can be coordinated more easily with shared initiatives, tangible objectives, and reliable and internationally recognised tools such as the United Nations Sustainable Development Goals.

The creation of a strategic and operational Sustainable Tourism plan is the next crucial step in this process. The priority will likely be to continue and redouble efforts to raise awareness about environmental and social solutions. Finally, by regularly analysing the results obtained and progress made, everyone concerned will be able to choose and plan their future actions, in coordination with the Monaco Government Tourist and Convention Authority.

This White Paper on Sustainable Tourism in Monaco represents a milestone on the path to that new roadmap, which all of us should be proud to build. From this point on, around the Monaco Government Tourist and Convention Authority, all of the stakeholders in the sector are invited to plan ahead as part of this collective Sustainable Tourism strategy.

The foundations have been laid over the last few years by the actions of our partners. Now, with this White Paper, the Monaco Government Tourist and Convention Authority calls on tourism stakeholders to help shape the Sustainable Tourism strategy and the action plan setting out the short and medium term goals. These will be officially unveiled in 2022.



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THANK YOU TO OUR CONTRIBUTORS



Because together, we are stronger...

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Organisations which contributed to collective workshops and one-to-one interviews

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- Casino de Monte-Carlo
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- Convention Bureau - Monaco Government Tourist and Convention Authority
- Cruise Services SAM
- Department of Education, Youth and Sport
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- Monaco Government Tourist and Convention Authority
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- Prince Albert II of Monaco Foundation
- François-Tourisme-Consultants
- Grimaldi Forum
- Monte-Carlo Société des Bains de Mer Group
- Hôtel Ambassador Monaco
- Hôtel Columbus Monte-Carlo
- Hôtel de Paris Monte-Carlo
- Hôtel Novotel Monte-Carlo 3 star
- Hôtel Port Palace
- Incentive Concept
- InspireME Monte Carlo
- Oceanographic Institute
- Laget & Partners
- Le Méridien Beach Plaza
- Monaco City Hall
- Métropole Shopping Monte-Carlo
- Mission for Energy Transition
- MOBEE
- Monaco Economic Board
- Monaco Yacht Show

- Monte-Carlo Bay Hotel & Resort
- Monte-Carlo Beach
- Museum of Prehistoric Anthropology
- Oceanographic Museum of Monaco
- One Monte-Carlo
- Peace and Sport
- Raising Stones
- Société Monégasque d'Assainissement
- Stars'N'Bars

Methods, surveys, activities

- François-Tourisme-Consultants

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- Monaco Government Tourist and Convention Authority
- François-Tourisme-Consultants



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ANNEXES



For more information...

Below is a non-exhaustive list of websites from which the data contained in this White Paper were obtained, along with the main contributors.

Data Sources

- Caisses Sociales de Monaco - www.caisses-sociales.mc
- Comité Régional de Tourisme (CRT) Côte D'Azur France - www.cotedazurfrance.fr
- Monegasque Bus Company - www.cam.mc
- Monaco's Official Development Assistance - www.gouv.mc/Gouvernement-et-Institutions/Le-Gouvernement/Departement-des-Relations-Exterieures-et-de-la-Cooperation/Direction-de-la-Cooperation-Internationale
- Department of Urban Amenities - www.gouv.mc/Gouvernement-et-Institutions/Le-Gouvernement/Departement-de-l-Equipement-de-l-Environnement-et-de-l-Urbanisme/Direction-de-l-Amenagement-Urbain
- Department of the Environment - www.gouv.mc/Gouvernement-et-Institutions/Le-Gouvernement/Departement-de-l-Equipement-de-l-Environnement-et-de-l-Urbanisme/Direction-de-l-Environnement
- Department of Tax Services - www.gouv.mc/Gouvernement-et-Institutions/Le-Gouvernement/Departement-des-Finances-et-de-l-Economie/Direction-des-Services-Fiscaux
- Monaco Government Tourist and Convention Authority - www.visitmonaco.com
- François-Tourisme-Consultants - www.francoistourismeconsultants.com
- Global Destination Sustainability Index - www.gds.earth/index/
- Monte-Carlo Société des Bains de Mer - www.montecarlosbm.com
- Michelin Guide - www.guide.michelin.com
- IMSEE - Monaco Statistics (IMSEE) - www.imsee.mc
- Mission for Energy Transition of the Principality of Monaco - www.transition-energetique.gouv.mc
- Monaco Convention Bureau (DTC) - www.cvb.visitmonaco.com
- United Nations Sustainable Development Goals (SDGs) - www.un.org/sustainabledevelopment/fr/
- International Maritime Organization - www.imo.org/fr
- World Tourism Organization (UNWTO) - www.unwto.org
- Organisation des Nations Unies (ONU) - www.un.org
- SNCF Train Express Régional - www.ter.sncf.com/sud-provence-alpes-cote-d-azur
- Société Monégasque de l'Électricité et du Gaz (SMEG) - www.smeg.mc
- Superyacht Eco Association - www.superyachtecoindex.com
- Monaco City Hall - www.mairie.mc
- World Travel and Tourism Council (WTTC) - www.wttc.org
- Your Monaco - www.yourmonaco.mc

Other Websites Connected to the White Paper on Sustainable Tourism

- Association des Industries Hôtelières Monégasque - www.aihm-monaco.com
- Association Monégasque pour la Protection de la Nature - www.ampn-nature-monaco.com
- Sustainable Tourism Unit of the Monaco Government Tourist and Convention Authority - www.visitmonaco.com/fr/environnement/26450/une-destination-engagee
- Centre Scientifique de Monaco - www.centrescientifique.mc/fr
- ECORISMO, sustainable tourism forums and exhibitions - www.ecorismo.com
- European Travel Commission - www.etc-corporate.org
- Extended Monaco - www.extendedmonaco.com
- Prince Albert II of Monaco Foundation - www.fpa2.org
- Global Sustainable Tourism Council - www.gstcouncil.org
- Professional Equality Index (French Ministry of Employment) - www.travail-emploi.gouv.fr/droit-du-travail/egalite-professionnelle-discrimination-et-harcelement/indexegapro
- Oceanographic Institute - Foundation Albert I, Prince of Monaco - www.oceano.org
- Monaco s'Engage contre le Gaspillage - www.contrelegaspillage.mc
- Pierre FROLLA and the Centre de Sauvetage Aquatique et de Plongée de Monaco / Académie Monégasque de la Mer / École Bleue - <https://pierrefrolla.com> - www.academiemonegasquedelamer.com
- UNWTO International Network of Sustainable Tourism Observatories - www.insto.unwto.org
- PELAGOS Sanctuary - www.sanctuaire-pelagos.org/fr/
- Société des Ports de Monaco - www.ports-monaco.com
- Société Monégasque d'Assainissement - www.sma.mc
- Société Monégasque des Eaux - www.smeaux.mc
- Tourism for Sustainable Development Goals (SDGs) - www.tourism4sdgs.org



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