



# STRATEGIC BUSINESS PLAN

## ISO/TC 228 Tourism and related services

### **EXECUTIVE SUMMARY**

The foremost aim of international standardization is to facilitate the exchange of goods and services through the elimination of technical barriers to trade. Tourism as one of the world's largest economic sectors, supporting 1 in 10 jobs worldwide, generating 10.4% of world GDP and accounting for 7% of the world exports.

ISO/TC 228 is responsible for standardization in the field of tourism and related services. Its scope reads “Standardization of the terminology and specifications of the services offered by tourism service providers, including related activities, touristic destinations and the requirements of facilities and equipment used by them, to provide tourism buyers, providers and consumers with criteria for making informed decisions”.

This Technical Committee (“TC”) is a tool for the tourism industry to better commercialize its products, services and offers and to increase the competitiveness of tourism organizations. The main objective of ISO/TC 228 is to develop International Standards (IS) and other ISO documents that truly respond to market needs and always respect the diversity of the industry, assisting consumers to select the best product/service for their needs regardless of the type of destination.

This Strategic Business Plan (“SBP”) provides the high-level roadmap for the creation of deliverables that support and improve the tourism services provided by organizations of any size and nature, operating anywhere in the world.

In particular, it is the intention of this TC to produce globally relevant International Standards that are used everywhere. This SBP describes how this will be achieved. The SBP will develop and evolve as the work of the TC progresses and will be kept under regular review.

## 1. INTRODUCTION

### 1.1 *ISO technical committees and business planning*

The extension of formal business planning to ISO Technical Committees (ISO/TCs) is an important measure which forms part of a major review of business. The aim is to align the ISO work programme with expressed business environment needs and trends and to allow ISO/TCs to prioritize among different projects, to identify the benefits expected from the availability of International Standards, and to ensure adequate resources for projects throughout their development.

### 1.2 *International standardization and the role of ISO*

The foremost aim of international standardization is to facilitate the exchange of goods and services through the elimination of technical barriers to trade.

Three bodies are responsible for the planning, development and adoption of International Standards: [ISO](#) (International Organization for Standardization) is responsible for all sectors excluding Electrotechnical, which is the responsibility of [IEC](#) (International Electrotechnical Committee), and most of the Telecommunications Technologies, which are largely the responsibility of [ITU](#) (International Telecommunication Union).

ISO is a legal association, the members of which are the National Standards Bodies (NSBs) of some 164 countries (organizations representing social and economic interests at the international level), supported by a Central Secretariat based in Geneva, Switzerland.

The principal deliverable of ISO is the [International Standard](#).

An International Standard embodies the essential principles of global openness and transparency, consensus and technical coherence. These are safeguarded through its development in an ISO Technical Committee (ISO/TC), representative of all interested parties, supported by a public comment phase (the ISO Technical Enquiry). ISO and its [Technical Committees](#) are also able to offer the ISO Technical Specification (ISO/TS), the ISO Public Available Specification (ISO/PAS) and the ISO Technical Report (ISO/TR) as solutions to market needs. These ISO products represent lower levels of consensus and have therefore not the same status as an International Standard.

ISO offers also the International Workshop Agreement (IWA) as a deliverable which aims to bridge the gap between the activities of consortia and the formal process of standardization represented by ISO and its national members. An important distinction is that the IWA is developed by ISO workshops and fora, comprising only participants with direct interest, and so it is not accorded the status of an International Standard.

## 2. BUSINESS ENVIRONMENT OF THE ISO/TC

### 2.1 Description of the Business Environment

The following political, economic, technical, regulatory, legal and social dynamics describe the business environment of the industry sector, products, materials, disciplines or practices related to the scope of this ISO/TC, and they may significantly influence how the relevant standards development processes are conducted and the content of the resulting standards:

#### 2.1.1 International concept of tourism

To address this section, the following documents have been used as a source of information:

1. United Nations (2010), *International Recommendations for Tourism Statistics 2008*, available at <http://unstats.un.org/unsd/tradeserv/tourism/manual.html>
2. Commission of the European Communities, Organization for Economic Cooperation and Development, United Nations and World Tourism Organization (2010), *Tourism Satellite Account: Recommended Methodological Framework 2008*, available at <http://unstats.un.org/unsd/tradeserv/tourism/manual.html>

The United Nations used to work with a description of tourism focused on the characteristics of visitors, on the conditions in which they travelled and stayed, the purpose of their visit, etc. Today, there is an increasing awareness of the role that tourism is playing and can play, whether directly, indirectly or through induced effects in the economy in terms of generation of value added, employment, personal income, government income, etc.

The United Nations present definition of tourism is based on its economic contribution and reads as follows:

**“Tourism** is defined as the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited.”

Another term commonly used in the area of tourism that is worth differentiating from “tourist” is “**visitor**”. All tourists are visitors. “Visitor is a traveler taking a trip to a main destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited (IRTS 2008, para. 2.9)”.

Visitors are grouped in two:

- tourists, that are overnight visitors, and
- excursionists, that are same-day visitors

Consequently, without visitors there is no tourism.

Therefore, the economic analysis of tourism requires the identification of the resources used by visitors on their trips, the consumption of goods and services that they acquire, and therefore the identification of the economic units that provide those goods and services. Both the demand and the supply perspectives are of equal importance. This reasoning leads us to the need to define tourism products and tourism activities.

**Tourism characteristic products:** are those that satisfy one or both of the following criteria:

- (a) Tourism expenditure on the product should represent a significant share total tourism expenditure (share-of-expenditure/demand condition);
- (b) Tourism expenditure on the product should represent a significant share of the supply of the product in the economy (share-of-supply condition). This criterion implies that the supply of a tourism characteristic product would cease to exist in meaningful quantity in the absence of visitors (IRTS 2008, para. 5.10).

Therefore, **tourism characteristic activities** are the activities that typically produce tourism characteristic products. As the industrial origin of a product (the ISIC industry that produces it) is not a criterion for the aggregation of products within a similar CPC category, there is no strict one-to-one relationship between products and the industries producing them as their principal outputs (IRTS 2008, para. 5.11).

Tourism is a social, cultural and economic phenomenon which entails the movement of people. The relationship of tourism with a great variety of economic activities has fostered interest in measuring its economic contribution, mostly in the places visited, and in assessing its interdependence with other social and economic activities. As a consequence, a number of countries and international organizations have been involved in the development of concepts, frameworks, databases and techniques to make this measurement possible.

In order to foster international comparability, the World Tourism Organization (UNWTO) developed successive sets of international recommendations on tourism statistics in 1978 and 1993. Recently, the International Recommendations for Tourism Statistics 2008 has been developed.

The Tourism Satellite Account (TSA) is a statistical framework and the main tool for the economic measurement of tourism. It has been developed by the World Tourism Organization (UNWTO), the Organization for Economic Cooperation and Development (OECD), the Statistical Office of the European Communities (Eurostat) and the United Nations Statistics Division. The Tourism Satellite Account: Recommended Methodological Framework 2008 (also known as the TSA: RMF 2008) provides the updated common conceptual framework for constructing a TSA. The TSA thus allows for the harmonization and reconciliation of tourism statistics from an economic (National Accounts) perspective. This enables the generation of tourism economic data (such as Tourism Direct GDP) that is comparable with other economic statistics. It adopts the basic system of concepts, classifications, definitions, tables and aggregates of the System of National Accounts 2008 (SNA 2008), the international standard for a systematic summary of national economic activity, from a functional perspective.

### **2.1.2 List of tourism activities and products**

As a reference for information, Table 1 below presents the typology of tourism characteristic consumption products and activities grouped in the 12 categories to be used in the Tourism Satellite Account (TSA).

The structure of TC 228 is not based in this classification since it responds to the standardization needs showed by the tourism stakeholders. For example, tourism standards related to Health tourism services might not easily fit in this classification and at the same time, activities such as those related to transport have not been the subject of ISO tourism standards yet.

**Table 1 - List of categories of tourism characteristic consumption products and tourism characteristic activities (tourism industries) is listed below as a reference.**

Products		Activities	
1	Accommodation services for visitors	1	Accommodation for visitors
2	Food and beverage serving services	2	Food and beverage serving activities
3	Railway passenger transport services	3	Railway passenger transport
4	Road passenger transport services	4	Road passenger transport
5	Water passenger transport services	5	Water passenger transport
6	Air passenger transport services	6	Air passenger transport
7	Transport equipment rental services	7	Transport equipment rental
8	Travel agencies and other reservation services	8	Travel agencies and other reservation services activities
9	Cultural services	9	Cultural activities
10	Sports and recreational services	10	Sports and recreational activities
11	Country-specific tourism characteristic goods	11	Retail trade of country-specific tourism characteristic goods
12	Country-specific tourism characteristic services	12	Other country-specific tourism characteristic activities

The detailed list of tourism characteristic products grouped by main categories can be consulted in this link: [https://unstats.un.org/unsd/publication/Seriesm/SeriesM\\_83rev1e.pdf](https://unstats.un.org/unsd/publication/Seriesm/SeriesM_83rev1e.pdf) (pag. 121 & 122)

### **2.1.3 Technological changes and major innovations related to the industry sector, products and materials**

The tourism sector lives in an ever-changing environment.

For years the tourism market has been limited by political barriers and was exclusive of certain population segments for economic reasons. However, during the second half of the 20<sup>th</sup> Century both economic and political barriers have progressively disappeared, allowing for a growing market that at present is one of the economic driving forces of our society. In parallel, we can for the first time talk of a global market, having experienced a great transformation of the generating regions and destinations in the world. In a few decades the tourism market has developed to incorporate new situations, new agents, new offer-demand relations and, as a consequence, new tools and processes for a faster and more efficient development of the market.

The development of the means of transport worldwide together with the increase in the available income and free time (paid holidays) have been essential for the development of the tourism market too. Today we are experiencing a deep change derived from the rise in the mobility of the public in economic terms thanks to low cost airlines and the development of high-speed transport, among other factors.

Thanks to **new information technologies**, the client can access the tourism offer directly and vice versa, in real time and globally. This represents a change in business and opens the possibility for some of the customers to change their buying habits. Now it is possible to design one's holidays package through the Internet without entering a travel agency. But at the same time, Online Travel Agencies (OTA) are playing a larger role in the travel industry by providing, similarly to more and more tourism service providers, an on-demand booking (through real-time availability over 24h/7d), a mobile-friendly environment (allowing the client to book and pay easily from mobile/ tablets avoiding paper tickets) and by integrating reviews and recommendations from other travelers in their offer. This is changing the way holidays are planned and contracted.

**Online consumer reviews** have become more and more important in the decision-making process of the consumer. Online review electronic platforms are now rating the service

providers according to the opinion of the consumers and have become so powerful that they can even shift the economic situation of hotels, restaurants or attractions. These opinions, together with price have become the most significant inputs when making a decision, since they provide additional product/service information and reduce uncertainty. They become also increasingly important to the supply side, pushing the service providers to enhance their marketing strategies. The social media have also become key in sharing the experience of the tourist and therefore have become another source of subjective but valuable firsthand information for others potential clients.

These changes imply the need for new tools for this emerging segment of the market supported by international references for transparency, quality and guarantee of the services contracted.

In recent years, the tourism market has undergone deep changes in its international geographical distribution. New countries are appearing as relevant tourism destinations. In this context, changes that before required decades, now take place in just a few years. This can also be supported by documents that are internationally accepted.

Data provided below shows a clear upward tendency in the number of international tourist arrivals, with exceptions due to economic, epidemic problems or even terrorism. Tourists have reduced the length of their travels but travel more times a year and offers have multiplied. In parallel, new models or tourism concepts such as eco-tourism, rural tourism, active tourism, congress, meetings and convention tourism, etc., have evolved. These are assuming a growing relevance as business segments.

But at the same time, horizontal concepts such as sustainable tourism (in line with the Sustainable Development Goals) or smart tourism are now the umbrella and the basis to develop specific tourism models.

According to UNWTO, **Sustainable tourism** can be defined 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". Learning about the impacts of tourism has led many people to seek more responsible holidays. Sustainable tourism is becoming so popular that some say that what we presently call 'alternative' will be the 'mainstream' in the near future. Sustainability is a process of continuous improvement and is also context-sensitive and therefore the actions to be taken to improve sustainability vary across destinations. Achieving it is vital for the long-term success of the tourism sector and for fulfilling its role as an agent of change. Competitiveness of the tourism industry is closely linked to its sustainability, as the quality of tourist destinations is strongly influenced by their natural and cultural environment, and their integration into the local community.

Mobile applications, semantic web, geolocation service systems, big data, augmented reality, tourism intelligence, monitoring visitor flow, etc.: the advance of technology is unstoppable, altering supply and demand scenarios. Digitalization is now a must to manage efficiently a tourism destination and provide a tailored service with a holistic approach thanks to the interaction among different suppliers and private public cooperation. The data that the destination collects from the visitor/tourist has become crucial when shaping new models, services and products that not only meet the needs of the digital tourist trends (i.e. connectivity has become essential for the tourist) but also anticipate the consumer's aspirations. Thanks to the technology, the ongoing relationship between the visitor/tourist and the destination starts with the planning of the trip, continues onsite at the destination but goes beyond, even when the tourist is back home. ICT has opened up a new horizon in the tourism industry which poses challenges and opportunities simultaneously, Hence, adapting products and services to the new digital tourist through **smart models**, is key to improve destinations competitiveness.

The tourism sector includes private business initiatives that create small companies providing tourism services and/or activities that are beneficial to the location. These may be small restaurants, cafes, family houses adapted to accommodate tourist, small companies organizing guided visits to the countryside, boat sightseeing, etc. These new small businesses may also benefit from standardization.

Another big change that has affected deeply the tourism industry is the **advent of New Platforms tourism services**, also known as sharing economy. The OECD describes it as 'new marketplaces that allow services to be provided on a peer-to-peer or shared usage basis'. This phenomenon is not limited to tourism, but tourism is one of the areas that has been most impacted. The use of internet has made sharing easier than ever through the creation of online platforms to book accommodation, transport, guided tours, shared dining, etc. Due to the lack of regulation of this new type of tourism, critics have raised that these new platforms provide unfair competition, avoid tax payments and do not meet safety and health requirements. Others believe the new platform tourism services has positive effects, since it provides more flexibility, a personal contact and experience and, in most cases, more affordable prices in relation to the quality offered.

Managing **overcrowding** in tourism destinations and find the right balance is the latest challenge for the tourism industry. With international tourist arrivals forecast to increase exponentially in the coming years, the greatest challenge for the tourism sector is to ensure that it grows sustainably, that fosters changes in traveler's behaviors for the good of the planet, encouraging sustainable-related practices and minimizing any adverse effect that the development of tourism may have on the destination. Overtourism might lead to alienation of local residents, overwhelmed limited infrastructures and services, threat to natural and cultural heritage and a poor tourist experience. This can be only fixed by understanding the reasons of the problem, by identifying vulnerabilities and by planning long term strategies through consensus between public and private stakeholders.

This changing scenario can be well supported by international standardization.

#### **2.1.4 Categories of relevant stakeholders**

Tourism is a broad area whose stakeholders are numerous as every interface of a tourism service exchange generates a stakeholder.

A list of categories of relevant stakeholders will include public and private organizations at national, regional and international level:

- service providers
- promoters or professionals of tourism products and services
- commercial agents and intermediaries in service provision
- clients or users of a service
- regulators of tourism activities
- cultural and heritage authorities
- equipment providers
- universities, schools and other entities that train on and issue professional tourist degrees or certificates
- professionals

#### **2.1.5 Choice and diversity**

Tourists choose to travel to locations based on: culture (gastronomy, traditions, religion, dressing, national holidays, music, etc.), people, language, geography, climate, risks and many others. These diverse characteristics serve to make the destination unique and desirable.

Any events or circumstances taking place in the area can influence choice, either positively or negatively. For example: an unstable social situation or even a war, risk of terrorism attack, local diseases, natural disasters as well as international cultural events, exhibitions, conferences and congresses, sports practising, etc.

### **2.1.6 Other relevant international, regional or national standards or voluntary initiatives**

The list of national voluntary standards in the field of tourism cannot be reproduced here because it would be endless and continuously changing. Many countries have national standards in place, but more and more are adopting the ISO TC 228 standards as a reference at national level.

There are some regional initiatives such as:

- CARICOM Regional Organisation for Standards and Quality (CROSQ) is the regional centre in the Caribbean for promoting efficiency and competitive production in goods and services, through the process of standardization and the verification of quality. For example, in the tourism field, there is a specification for tourist accommodation.
- At European level, CEN/TC 329 “Tourism services” has developed 12 standards in the areas of hotels and accommodation, travel agents and tour operators, diving, language study tours providers, and tourist guides. Some of them are adoption of ISO Standards. The full list of European standards is available here: [https://standards.cen.eu/dyn/www/f?p=204:32:0:::FSP\\_ORG\\_ID,FSP\\_LANG\\_ID:6310,25&cs=155D293280BEDE1B5E32BB51F9C418EA2](https://standards.cen.eu/dyn/www/f?p=204:32:0:::FSP_ORG_ID,FSP_LANG_ID:6310,25&cs=155D293280BEDE1B5E32BB51F9C418EA2)

At international level there are no other ISO standards specific for tourism apart from those that fall under ISO/TC 228 scope but it is noted that some ISO standards published in other fields (technical, managerial, terminological) may be of help in the development of standards for tourism.

Here are some examples of general and specific standards:

- ISO 9001:2015 Quality management systems Requirements
- ISO 20488:2018 Online consumer reviews -- Principles and requirements for their collection, moderation and publication
- ISO 26000:2010 Guidance on social responsibility
- ISO 20121:2012 Event sustainability management systems -- Requirements with guidance for use

ISO has already taken the challenge to deal with new important fields of activity that are horizontal and somehow linked to the tourism industry, such as:

- Circular economy (ISO/TC 324)
- Sharing economy (ISO/TC 323)
- Transaction assurance in E-commerce (ISO/TC 321)
- Consumer protection: privacy by design for consumer goods and services (ISO/PC 317)
- Ageing societies (ISO/TC 314)
- Blockchain (ISO/TC 307)

- Guidelines on consumer warranties and guarantees (ISO/PC 303)
- Energy management and energy savings (ISO/TC 301)
- Robotics (ISO/TC 299)

### **2.1.7 Legislation in the field of tourism**

Tourism legislation is heterogeneous and can vary from one country to another or even within the same country. Although some countries might be over regulated, there are still many countries where there is a lack of legislation or guidance documents concerning tourism and therefore, where ISO standards can play an important role since they represent consensus on the best practice in a specific sector. Sometimes these voluntary standards can provide a sound source for legislation too,

Governments play an important role in the sustainability of tourism, hence a coherent and comprehensive approach to tourism policy development should help reframe tourism growth to better spread the benefits, address inequalities, and improve the resilience of economies

In some regions such as Europe, there is extensive consumer protection legislation that ensures a high-quality service for tourists in terms of information, assistance, and where necessary compensation. This includes for example legislation on package travel, prohibition of unfair terms and commercial practices, assistance in case of disruptive events, and rights of persons with disabilities.

It is desirable that standards developed under ISO do not duplicate nor contradict existing legislation.

## **2.2 Quantitative Indicators of the Business Environment**

The following list of quantitative indicators describes the business environment in order to provide adequate information to support actions of the ISO/TC:

### **2.2.1 General**

The following list of quantitative indicators describes the business environment in order to provide adequate information to support actions of the ISO/TC.

The strong and sustained rise of tourism over the past fifty years constitutes one of the most remarkable economic, social and cultural phenomena of our time.

As an industry, tourism is labour-intensive and is seen as less vulnerable than traditional productive sectors (despite disasters); it is non-cyclical (despite financial crises); it has a catalytic effect on the rest of the economy; it has lower barriers to entry and creates better and more gender concerned jobs than most sectors. More importantly, being built on natural and cultural assets and consumed on site, it can reach the poor in rural areas where poverty may be harsher.

Tourism, broadly defined, is considered as the world's largest and one of the fastest growing industries.

### **2.2.2 Economic, employment and activity data related to tourism**

(Source: "Tourism Highlights 2018 Edition". UNWTO <https://www.e-unwto.org/doi/pdf/10.18111/9789284419876> and World Travel and Tourism Council (WTTC) <https://www.wttc.org/research/economic-research/economic-impact-analysis/> )

Here are some KEY data and indicators that better help to understand the relevance of the Tourism Industry in the world:

- International tourist arrivals have increased from 25 million globally in 1950 to 278 million in 1980, 674 million in 2000, and 1, 326 million in 2017.
- Likewise, international tourism receipts earned by destinations worldwide have surged from US\$ 2 billion in 1950 to US\$ 104 billion in 1980, US\$ 495 billion in 2000, and US\$ 1,340 billion in 2017.
- International tourism represents 7% of the world's exports in goods and services, after increasing one percentage point from 6% in 2015. Tourism has grown faster than world trade for the past five years.
- According to the World Travel and Tourism Council (WTTC) Tourism currently represents 10% of the World's GDP (direct, indirect and induced) and 1 in 10 jobs in the world.
- International tourist arrivals (overnight visitors) in 2017 grew by 7% to reach a total of 1,326 million worldwide, an increase of 91 million over the previous year. It was the eight-consecutive year of above-average growth in international tourism following the 2009 global economic crisis.
- By UNWTO region, Africa led growth in 2017 with a 9% increase in international arrivals, followed by Asia and the Pacific Africa (+6%) and the Americas (+5%). The world's most visited region, Europe (+8%) showed mixed results, while available data for the Middle East (5%) points also to growth in arrivals.
- France, Spain the United States, and China continued to top the international arrivals ranking in 2017. In receipts, the US and Spain remain at the top.
- China, the United States and the Germany led outbound tourism in their respective regions in 2017 and continue to top the expenditure ranking in that order.
- International tourist arrivals worldwide are expected to increase by 3.3% a year between 2010 and 2030 to reach 1.8 billion by 2030, according to UNWTO's long-term forecast report Tourism Towards 2030. The market share of emerging economies increased from 30% in 1980 to 45% in 2016, and is expected to reach 57% by 2030, equivalent to over 1 billion international tourist arrivals.
- In 2017, slightly over half of all overnight visitors travelled to their destination by air (57%), while the remainder travelled by surface transport (43%) – whether by road (37%), rail (2%) or water (4%). The trend over time has been for air transport to grow at a somewhat faster pace than surface transport, thus the share of air transport is gradually increasing.
- Travel for holidays, recreation and other forms of leisure accounted for just over half of all international tourist arrivals in 2016 (55%). Some 13% of all international tourists reported travelling for business and professional purposes, and another 27% travelled for other reasons such as visiting friends and relatives (VFR), religious reasons and pilgrimages, health treatment, etc. The purpose of visit for the remaining 6% of arrivals was not specified.

- According to the World Travel and Tourism Council (WTTC) Tourism currently represents 10% of the World's GDP (direct, indirect and induced) and 1 in 10 jobs in the world (313 million jobs),
- In 2017, Travel & Tourism's direct, indirect and induced impact accounted for:
  - o US\$8.3 trillion contribution to the world's GDP, 10.4% of global GDP
  - o US\$1.5 trillion exports (6.5% of total exports, 28.8% of global services exports)
  - o US\$882 billion investment (4.5% of total investment)
- 2017 was a bumper year for the global Travel & Tourism sector, which grew at 4.6%, much faster than the economy as a whole (3% growth during 2017). Its role as a driver of prosperity is clear, as the sector created 7 million new jobs in 2017, 1 in 5 of all new jobs across the world.
- According to Eurostat, tourism industries prove resilient to the economic crisis and provide jobs for women and young people. However, the proportion of part-time employment in the tourism industries is significantly higher than in the total non-financial business economy and jobs are less stable in tourism than in the rest of the economy, partially due to the seasonal fluctuations of the tourism industry. Labor costs and earnings tend to be significantly lower in the tourism industries than they are in the total economy. All these data and characteristics can be extrapolated to a global scale.

Concerning the tourism labor force, training remains unfinished business. There is a need of duly trained staff, also familiar with the destination, to ensure the provision of an authentic experience to the visitor.

### **3. BENEFITS EXPECTED FROM THE WORK OF THE ISO/TC**

Expected benefits from the work of ISO/TC 228 are:

- Create transparency in the exchange of tourism products and services
- Rise consumer's confidence in the tourism market
- Help fair competition in the tourism market
- Promote environmental protection by identification of environmentally friendly tourism products and services
- Support policies of ethical tourism
- Support "tourism for all", regardless of people's abilities
- Improvement of personal and property security- Adaptation to innovations
- Open new markets in the broadest sense
- Help developing countries to promote themselves thereby providing economic and social benefits-
- Knowledge transfer
- Improve customer satisfaction

All these factors will contribute to a general and common expected benefit which will stimulate the tourism market.

## 4. REPRESENTATION AND PARTICIPATION IN THE ISO/TC

### 4.1 Membership

At the inception of this Technical Committee there were 57 countries involved (46 P and 11 O). At this moment the committee has nearly doubled this figure, with 102 countries involved (69 Participant members and 33 Observers) plus over 20 liaison organization. ISO TC 228 is one of the largest committees in ISO in terms of representativeness.

As this number is changing constantly, this link provides the updated composition of the TC: <https://www.iso.org/committee/375396.html?view=participation>

### 4.2 Analysis of the participation

#### List of current members:

##### P members: Participating Members (69)

Antigua and Barbuda (ABBS)	Ethiopia (ESA)	Nigeria (SON)
Argentina (IRAM)	Finland (SFS)	Panama (COPANIT)
Australia (SA)	France (AFNOR)	Portugal (IPQ)
Austria (ASI)	Georgia (GEOSTM)	Russian Federation (GOST R)
Bahamas (BBSQ)	Germany (DIN)	Saint Kitts and Nevis (SKNBS)
Bahrain (BSMD)	Greece (NQIS ELOT)	Saint Lucia (SLBS)
Barbados (BNSI)	Guyana (GNBS)	Saint Vincent and the Grenadines (SVGBS)
Belgium (NBN)	India (BIS)	Saudi Arabia (SASO)
Belize (BZBS)	Iran, Islamic Republic of (ISIRI)	Seychelles (SBS)
Brazil (ABNT)	Ireland (NSAI)	South Africa (SABS)
Bulgaria (BDS)	Israel (SII)	Spain (UNE)
Canada (SCC)	Italy (UNI)	Sri Lanka (SLSI)
Colombia (ICONTEC)	Jamaica (BSJ)	Suriname (SSB)
Congo, The Democratic Republic of the (OCC)	Korea, Republic of (KATS)	Sweden (SIS)
Costa Rica (INTECO)	Kyrgyzstan (KYRGYZST)	Switzerland (SNV)
Croatia (HZN)	Lithuania (LST)	Thailand (TISI)
Cyprus (CYS)	Luxembourg (ILNAS)	Togo (ATN)
Czech Republic (UNMZ)	Malaysia (DSM)	Trinidad and Tobago (TTBS)
Denmark (DS)	Malta (MCCAA)	Tunisia (INNORPI)
Dominica (DBOS)	Mexico (DGN)	Turkey (TSE)
Dominican Republic (INDOCAL)	Montenegro (ISME)	Uganda (UNBS)
El Salvador (OSN)	Morocco (IMANOR)	United Kingdom (BSI)
	Mozambique (INNOQ)	Uruguay (UNIT)
	Netherlands (NEN)	

##### O members: Observing Members (34)

Algeria (IANOR)	Cuba (NC)	Japan (JISC)
Armenia (SARM)	Ecuador (INEN)	Jordan (JSMO)
Bhutan (BSB)	Egypt (EOS)	Kazakhstan (KAZMEMST)
Bolivia, Plurinational State of (IBNORCA)	Fiji (DNTMS)	Kenya (KEBS)
Cameroon (ANOR)	Gabon (AGANOR)	Macao (CPTTM)
Chile (INN)	Honduras (OHN)	Mauritius (MSB)
China (SAC)	Hungary (MSZT)	Mongolia (MASM)
	Indonesia (BSN)	

Nepal (NBSM)  
New Zealand (NZSO)  
Poland (PKN)  
Romania (ASRO)  
Serbia (ISS)

Slovakia (SOSMT)  
Tanzania (TBS)  
Ukraine (DSTU)  
United Arab Emirates  
(ESMA)

Uzbekistan  
(UZSTANDARD)  
Zimbabwe (SAZ)

### Balance among participation of developed countries, developing countries and countries with economies in transition

**60% of these countries are developing countries**, according to the DAC List of ODA Recipients shows all countries and territories eligible to receive official development assistance (ODA). These consist of all low and middle income countries based on gross national income (GNI) per capita as published by the World Bank, with the exception of G8 members, EU members, and countries with a firm date for entry into the EU. The list also includes all of the Least Developed Countries (LDCs) as defined by the United Nations (UN).

Many of these developing countries do participate in ISO TC through the “New Rights” pilot programme promoted by ISO.

### Balance of participation among regions of the world

ISO TC 228 is one of the committees in ISO with greater representation (+100 countries). All five continents are represented in ISO/TC 228. However, Africa has the least number of countries participating in the TC, either as P or as O Members.

Eastern Europe and Asia have also lower representation than other regions in the TC.

In spite of his major role in tourism and of several contacts, United States is still non-member of the TC 228.

### Liaison organizations

#### List of Organizations in liaison (Category A and B)

- AIPC International Association of Convention Centres
- ANEC European Association for the Co-ordination of Consumer Representation in Standardization
- EC - European Commission European Commission
- ECTAA The European Travel Agents' and Tour Operators' Associations
- EFCO&HPA European Federation of Campingsite Organisations and Holiday Park Associations
- GSTC Global Sustainable Tourism Council
- HOTREC Hotels, Restaurants & Cafés in Europe
- IAAPA International Association of Amusement Parks and Attractions
- IATA International Air Transport Association
- IH&RA International Hotel & Restaurant Association
- SBS - Small Business Standards Small Business Standards
- UNEP United Nations Environment Programme
- UNWTO World Tourism Organization
- WFTGA World Federation of Tourist Guides Associations

#### List of Organizations in liaison (Category C)

C liaisons participate at the level of a Working Group

- ATTA Adventure Travel Trade Association
- CMAS World Confederation of Underwater Activities
- EBA - boating/navigation The European Boating Association
- ENAT European Network for Accessible Tourism a.s.b.l.
- ESPA European Spas Association
- EUF European Underwater Federation
- ICOMIA International Council of Marine Industry Associations
- WRSTC World Recreational Scuba Training Council

Constant efforts are made from the secretariat to involve new countries and organizations in the development of the TC 228 so that the documents published under this committee achieve the desired global relevance.

#### Balance of responsibilities

Since its inception, the TC 228 is managed through a Twinning arrangement, both at the Chairmanship and at the TC Secretariat, between Spain (UNE) and Tunisia (INNORPI).

Also, the leadership of the different Working Groups is shared among different countries. A Chair Advisory Group (CAG), formed with the WG convenors and/or WG secretaries, with geographical balance representation, was created in 2015 to assess the leadership in coordinating and steering the Committee.

## **5. OBJECTIVES OF THE ISO/TC AND STRATEGIES FOR THEIR ACHIEVEMENT**

### **5.1 *Defined objectives of the ISO/TC***

The main objective of ISO/TC 228 is to develop International Standards (IS) and other ISO documents that truly respond to market needs. These documents shall be practical; target oriented and be feasible to apply. They should not impose unnecessary demands on the tourism industry and should always respect the diversity of the industry.

This TC shall be a tool for the tourism industry to better commercialize its products, services and offers and to increase the competitiveness of tourism organizations. This can be achieved by ensuring the widest circulation of internationally recognized documents.

International Standards and other documents issued by ISO/TC 228 should assist the management of the tourism industry regardless of the status of the enterprise.

International standards and other international documents should assist consumers to select the best product for their needs regardless of the type of destination.

Developed countries for which tourism is a consolidated industry, having higher production costs have to ensure continuous improvement of the offer while making the most of their processes and investments.

ISO/TC 228 proposals should support and stimulate tourism activity and never restrict or constrain the existing tourism market.

For the user of tourism services, standards and other international documents can be a source of technical or managerial information. This need not be complex but will allow the user to make informed choices and increase confidence in selecting both traditional and more innovative destinations.

Hopefully, every interface of the tourism commercialization will also benefit from international standards being these a reference for transparency and quality and a means of tourism activity diffusion.

The objectives of TC 228 are assessed taking account of the costs that new standards could impose on the industry, especially on SMEs.

### **5.2 *Identified strategies to achieve the ISO/TC's defined objectives***

Since the tourism industry covers so many subsectors, the work of the TC 228 has been allocated to different working groups, responsible for developing specific projects.

TC 228 is currently structured in 9 active Working Groups, focusing on the following areas:

- Diving services (WG 1) led by Austria is the most prolific, with 11 published standards, many of them in collaboration with CEN (under Vienna Agreement, ISO Lead)
- Health tourism services (WG 2) led by Spain and Tunisia with 3 published standards and 1 ongoing project
- Adventure tourism (WG 7) led by Brazil has developed 4 standards and a handbook and is working on 1 project
- Yacht Harbours (WG 8) led by Belgium, has published 3 standards and is developing 1 project

- Bareboat charters (WG 11) led by UK has published 1 standard and has 1 active project
- Sustainable tourism (WG 13) led by Brazil has published 1 standard and is currently working on 1 project
- Accessible tourism (WG 14) led by UNWTO and Spain with 1 project under development
- Accommodation (WG 15) led by Spain with one project about hotels.
- Restauration (WG 16) led by the Republic of Iran is developing 1 project.

The following WGs are now disbanded after completion of their respective tasks:

- Tourist information offices (WG 3) led by Argentina (ISO 14785:2014 *Tourist information offices -- Tourist information and reception services – Requirements*)
- Beaches (WG 5) led by UK (ISO 13009:2015 *Tourism and related services -- Requirements and recommendations for beach operation*)
- Natural protected areas (WG 6) led by Argentina (ISO 18065:2015 *Tourism and related services -- Tourist services for public use provided by Natural Protected Areas Authorities – Requirements*)
- Industrial Tourism (WG 9) led by France (ISO 13810:2015 *Tourism services -- Industrial tourism -- Service provision*)
- Environmentally friendly accommodation (WG 10) led by Turkey, ISO/TS 13811:2015 *Tourism and related services -- Guidelines on developing environmental specifications for accommodation establishments*

In addition, WG 4 Golf services and WG 12 Volunteer tourism were disbanded due to the lack of consensus on the approach of the project in the first topic and due to the lack of progress and interest from the stakeholders in the latter. Those decisions were made in order to concentrate the available resources on the projects that do have support from the stakeholders.

Working Groups usually meet twice or 3 times per year, according to their needs, deadlines and project calendar, sometimes in conjunction with Tourism events. In order to save travel costs and time for the experts, TC resolution 166/2017 recommends and encourages WGs to meet together with the Plenary once per year (traditionally in May). In addition, online tools such as Zoom, are being promoted and used more and more frequently to allow experts who cannot travel to participate remotely and contribute to the work, resulting in a wider consensus.

In recent years and following suggestions from the consumers' side (ANEC), there have been consultations on the need to standardize car rental services (where complaints from customers were frequent) and other areas such as cruise tourism, but the results were poor and showed little support and commitment to lead such projects and therefore the proposals were not even launched.

A questionnaire to identify new initiatives was circulated in 2014 in order to set up an informal database of potential New Work Items proposals. Also at every plenary meeting, each country is invited to share news concerning new projects and standards at national level. In many cases, national standards have served as a basis for ISO TC 228 Standards.

So far, TC 228 has worked on vertical areas, (e.g. diving, yacht harbours, natural protected areas) but is now mature enough to address horizontal issues such as accessibility or sustainability in tourism.

Published standards are aimed to help the private sector (spas, adventure tourism providers, etc.) but also the public sector that manages tourism resources (beaches, tourist offices, etc.).

All in all, the TC 228 has published 29 standards and is working on 12 projects. The updated list of projects and standards can be found here:

<https://www.iso.org/committee/375396/x/catalogue/p/1/u/0/w/0/d/0>

## **6. FACTORS AFFECTING COMPLETION AND IMPLEMENTATION OF THE ISO/TC WORK PROGRAMME**

### **Perceptions of some stakeholders**

When the new field of activity “Tourism and related services” was launched in 2005, 27 countries voted in favour, 6 against and 3 abstentions. The six countries against the creation of ISO/TC 228 were European and specifically concerned the development of standards for accommodation, catering, travel agents and tour operators mainly due to an over regulation in those countries. With no tradition of formal international standardization applying to tourism, there were legitimate concerns that any international standards produced will restrict and control business interests in an unacceptable manner.

Arguments against international standardization expressed by various stakeholders have been:

- cultural and geographical differences are intrinsic to tourism products and activities and absolutely desirable. Tourist expectations vary according to the destination and type of tourism
- development of international standards is very costly in itself, both in terms of human and economic resources
- conformance with International Standards can be a great challenge for micro, small and medium-sized enterprises, which form the backbone of the tourism industry
- development of any voluntary standards should be the full competence of the industry
- International Standards do not guarantee quality
- ISO standards may provide a sound source for legislation
- Standards should be driven by the providers and consumers and developed by multi-sectorial stakeholders.

Nevertheless, time has gone by and these initial concerns may have been overcome for some stakeholders. ISO TC 228 has always followed the procedures to ensure that standards development in these and other areas have the support of the industries concerned. As stated in the very first paragraph of this Business Plan:

*The aim is to align the ISO work programme with expressed business environment needs and trends and to allow ISO/TCs to prioritise among different projects, to identify the benefits expected from the availability of International Standards, and to ensure adequate resources for projects throughout their development.*

So far, ISO TC 228 has always concentrated on areas where there have been support and consensus of ISO members and has avoided controversial fields of tourism. Cooperation from the more developed tourism industries represented by the liaison bodies, such as HOTREC, ECTAA, ANEC or SBS has been helpful in the successful development of international standards.

### **TC leadership**

After 12 years and following ISO rules, the Chair Mr. Eduardo Moreno and Vice Chair Mr Mounir Ben Miled ended their terms and as a consequence, in 2018 the chairmanship was renewed under the Memorandum of Understanding between UNE and INNORPI. A smooth transition has been ensured in order not to impact on the ongoing work of the TC. Also, the advice and support from UNE and INNORPI as well as from the CAG members has helped the new Chair (Mr. Manuel Otero) and Vice-Chair (Mr. Habib Bouzlama) to quickly assume their responsibilities.

### **Expert resources**

One of the needs that are common to some of the working groups is the necessity to involve real experts from more countries in the development of particular projects, so as to have a wider

expertise allowing a major consensus in the standards and a broader implementation. Time, travel costs and language can be a barrier for many experts, especially from developing countries. An effort is being made in this regard by secretaries and convenors to invite relevant experts/countries and better communicate information on projects. Also sponsorship programs and electronic tools for videoconference have proven to be of great help in order to increase participation.

The link between National Standards Bodies and National stakeholders should be strengthened. NSB should draw attention to the benefits standardization can bring to the tourism sector.

## 7. STRUCTURE, CURRENT PROJECTS AND PUBLICATIONS OF THE ISO/TC

### Information on ISO online

The link below is to the TC's page on ISO's website:

<https://www.iso.org/committee/375396.html>

Click on the tabs and links on this page to find the following information:

- About (Secretariat, Secretary, Chair, Date of creation, Scope, etc.)
- Contact details
- Structure (Subcommittees and working groups)
- Liaisons
- Meetings
- Tools
- Work programme (published standards and standards under development)

More information can be found on the ISO TC 228 dedicated website:

<https://committee.iso.org/home/tc228>

The vast majority of the 29 documents published by ISO/TC 228 are ISO standards (93%), the rest are Technical Specifications (1) and Technical reports (1). The average track is the default timeframe (36 months)

### EN-ISO Projects

A close cooperation has been established between CEN TC 329 and ISO TC 228 concerning the Diving Standards, since a number of non-European countries have expressed their interest in EN standards for scuba diving services to be developed as ISO standards. Interested parties in the diving sector have agreed to support an initiative to advance these European Standards to an international level and this would be in the interests of scuba divers worldwide. Now the standardization on diving is carried out by ISO TC 228/WG1 and developed in parallel and adopted by CEN through the Vienna Agreement. According to CEN/TC 329, it is estimated that at least 50% of European divers dive regularly outside of Europe and many Europeans enjoy their first scuba experience overseas. In pursuing their activities scuba divers travel extensively and see a potential benefit in internationally recognized industry Standards and qualifications.

Below is the list of EN-ISO Standards developed under Vienna Agreement (ISO Lead)

- EN ISO 11121:2017 Recreational diving services - Requirements for introductory programmes to scuba diving (ISO 11121:2017)
- EN ISO 13293:2012 Recreational diving services - Requirements for gas blender training programmes (ISO 13293:2012)
- EN ISO 24801-1:2014 Recreational diving services - Requirements for the training of recreational scuba divers - Part 1: Level 1 - Supervised diver (ISO 24801-1:2014)
- EN ISO 24801-2:2014 Recreational diving services - Requirements for the training of recreational scuba divers - Part 2: Level 2 - Autonomous diver (ISO 24801-2:2014)
- EN ISO 24801-3:2014 Recreational diving services - Requirements for the training of recreational scuba divers - Part 3: Level 3 - Dive leader (ISO 24801-3:2014)
- EN ISO 24802-1:2014 Recreational diving services - Requirements for the training of scuba instructors - Part 1: Level 1 (ISO 24802-1:2014)
- EN ISO 24802-2:2014 Recreational diving services - Requirements for the training of scuba instructors - Part 2: Level 2 (ISO 24802-2:2014)
- EN ISO 24803:2017 Recreational diving services - Requirements for recreational diving providers (ISO 24803:2017)

Also, EN ISO 18513:2003 Tourism services - Hotels and other types of tourism accommodation - Terminology (ISO 18513:2003) was developed in collaboration with CEN TC 329 and is now being revised by ISO TC 228/WG 15 Accommodation.

## **Reference information**

***Glossary of terms and abbreviations used in ISO/TC Business Plans***

***General information on the principles of ISO's technical work***