



All Aboard?

Assessing the role of cruise tourism in the sustainable development of
SIDS – a case on Cape Verde

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Cover photo: A cruise ship docked at Porto Grande, Sao Vicente

Foreword and acknowledgements

This thesis would not have been possible without the support of a host of groups and individuals. Firstly, my friends and family for being my rock throughout the process – without you I could never have gotten this far.

Secondly to all of the respondents involved in the research, who willingly gave their time towards my research endeavours. To Simabo Backpackers Association for providing a welcoming, work-focused environment for me to use as my base while in Cape Verde, for your spirit of *morabeza*. Finally, I thank all those who took their time to review my work and guide me with feedback when I needed it most.

This has been my most challenging experience to date, I write these final words with eagerness and a slight sense of melancholy – for they are among the last I will write during my time at Utrecht University.

All emissions associated with this research have been offset through certified channels.

Summary

Key concepts: Sustainable tourism, coastal and marine tourism, Blue Economy

Small island developing states (SIDS) face unique challenges on their path towards sustainable development. For many of these states, development is spurred on by official development assistance, remittances, and receipts from tourism activities.

Cruise tourism is one of the fastest growing segments of the modern tourism industry and represents an important factor in the development of small island developing states. The unique development challenges encountered by these island states have been addressed since 1994, with strategic plans set to aid them in their journey towards sustainable development. However, this industry is only briefly glossed over in development plans and do not highlight the specific role of cruise tourism in the sustainable development of island states.

By analysing cruise tourism within the framework of sustainable tourism, this report assesses the potential of the cruise tourism industry towards fulfilling sustainable development in island states through a case study set on the island region of Cape Verde. The report firstly examines the global cruise tourism industry, its impacts, benefits, and trends in the field of sustainable development. Secondly, the cruise industry of Cape Verde is examined – its history, trends, and importance as a driver of development in the region. The sustainability strategies of Cape Verde are then analysed to gauge the regions efforts in this endeavour, using the SDGs as the main measuring stick.

Finally, this information is synthesised towards identifying how cruise tourism could fit within the sustainable development of Cape Verde, presenting a framework based on the recently conceptualised Blue Economy strategy.

The research finds that while there are opportunities for cruise tourism to contribute towards sustainable development, the structure of the industry itself may impede some of these efforts. In order to truly contribute towards SDG development in Cape Verde, partnerships must be formed with local actors in Cape Verde, and goals and indicators must be set and monitored by third party authorities such as the UN World Tourism Organisation. It remains unclear whether or not the cruise tourism industry can achieve true sustainability within the blueprint of sustainable development.

List of acronyms

BPOA – Barbados Programme of Action

CAU – Carnival Australia

CESD – Centre on Ecotourism and Sustainable Development

CLIA – Cruise Lines International Association

DESA - United Nations Department of Economic and Social Affairs

GRT – Gross Registered Tonnage

IMO – International Maritime Organisation

LDC – Least Developed Country

LNG – Liquid Natural Gas

MDGs – Millennium Development Goals

MSI – Mauritius Strategy of Implementation

NGO – Non-governmental Organisation

ODA – Official Development Assistance

PEDS – Plano Estratégico de Desenvolvimento Sustentável

SAMOA – SIDS Accelerated Modalities of Action

SDGs – Sustainable Development Goals

SDGCA – Sustainable Development Goal Centre for Africa

SDSN – Sustainable Development Solutions Network

SIDS – Small Island Developing States

SPTO – South Pacific Tourism Organisation

TIES – The International Ecotourism Society

UNDAF – United Nations Development Assistance Fund

UNEP – United Nations Environment Programme

UNWTO – United Nations World Tourism Organisation

WWF – World Wildlife Fund

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Introduction

Societal Background

The challenges and needs faced by small island developing states (SIDS) in pursuing sustainable development have been on the international agenda since the United Nations (UN) Earth Summit in Rio de Janeiro in 1992. These island states are characterised by economic and ecological fragility; ecologically most of them are coastal entities with small and dispersed land areas, possessing a rich diversity of highly endemic flora and fauna but relatively few natural resources (Agenda 21). Vulnerability here can be defined as the extent to which the environment, economy or social system is prone to damage or degradation by external factors whereby; (1) economic vulnerability refers to the risks faced by these economies from external shocks to production, distribution, and consumption systems, (2) environmental vulnerability refers to the risk of damage to the islands natural ecosystem, including physical and biological processes, and ecological resilience, and (3) social vulnerability refers to the degree in which societies are negatively affected by stresses and hazards (Ghina, 2003).

The issue of sustainability in SIDS has been revisited in; (1) 1994 by the UN General Assembly which held a conference in Barbados which developed the Barbados Programme of Action for the Sustainable Development of SIDS (BPOA), (2) 2005 in Mauritius, leading to the Mauritius Strategy of Implementation (MSI), and (3) again in 2014 in Apia, Samoa – which developed the SIDS Accelerated Modalities of Action (SAMOA) Pathway. The BPOA conference adopted and identified 14 priority areas and actions necessary for addressing the special challenges faced by SIDS including; tourism resources, trade and economic diversification, and finance. It was here that the need to ensure a good quality of life for the people of these countries and the need for institutional capacity building were raised (United Nations, 1994). The MSI conference reflected on the 10-year performance of the BPOA, recognizing that there were still constraints in fulfilling the activities of the BPOA. The outcome document recognized that, although they are afflicted by economic difficulties and confronted by development imperatives similar to those of developing countries generally, SIDS have their own peculiar vulnerabilities and characteristics (UN, 2018a). The conference set forth actions and strategies in 19 priority areas, built upon the original 14 thematic areas of BPOA such as graduation from least developed country status, sustainable production and consumption, health, knowledge management, and culture (UN, 2005b). The third conference on SIDS, held in Samoa, emphasised the importance of partnerships in ensuring their sustainable development. This conference urged actors from across the world to support SIDS on their path to sustainable development, calling for support in improved monitoring, access to international climate finance, technical assistance for enhancing resilience, and mainstreaming policies in relation with disaster risk management (Ocean and Climate Initiatives Alliance, 2019). A key outcome of this conference was the establishment of the SIDS Partnership Framework, designed to monitor progress of existing partnerships for sustainable development as well as launch new partnership ventures – over 300 of which were established at the conference (UN General Assembly, 2014). In September 2019 member states will convene a one-day high-level meeting at the United Nations Headquarters in New York to review progress made in addressing the priorities of SIDS through the implementation of the SAMOA Pathway (UN, 2018b).

Finally, the need for realistic, transparent, achievable sustainability targets prompted the United Nations (UN) in 2015 to devise the Sustainable Development Goals (SDGs) (United Nations, 2015b). Developed from the framework of the prior Millennium Development Goals (MDGS) These 17 goals consist of 169 targets, each having between 1 and 3 indicators used to measure progress toward reaching the targets addressing issues including water, energy,

climate, oceans, urbanization, transport, science and technology (United Nations, 2015a). These goals are reflected in both the MSI and SAMOA Pathways documentation so as to ease the adoption process, and their progress has been reviewed and monitored worldwide. The SDGs will be the key focus in this paper when examining Cape Verde's sustainable development progress.

Problem Statement and Scientific Background

Tourism and Sustainable development

Due to resource constraints, many SIDS must seek development at the cost of energy and environment, causing them to put development objectives before the environment and focus on automation to enhance productivity. The geographic insularity and limited available resources in SIDS often lead them to be highly dependent on international trade, official development assistance (ODA), and tourism activity to support their development efforts (UNDP, 2017). Tourism; a large, complex and fragmented industry which is still very difficult to define and measure is a key component of the service economy and plays a vital role in the development of SIDS. This industry is an economic engine for most SIDS, recognized by the United Nations World Tourism Organisation (UNWTO) as one of the fastest growing economic sectors in the world, playing a vital role in job and wealth creation, environmental protection, cultural preservation, and poverty alleviation (UNWTO, 2018). On the other hand however, increasing numbers of people travelling internationally and domestically each year can be linked to increases in greenhouse gas emissions, economic leakages, resource management, and negative impacts on local communities and cultural heritage (UNWTO, 2019).

The importance of tourism as an economic driver in SIDS was revisited and reaffirmed at BPOA, MSI, and SAMOA conferences. At the MSI conference participants acknowledged the need for an appropriate balance between the development of tourism against other sectors of the economy, as well as the continuous challenges of making appropriate linkages to other sectors, including to local service providers so as to retain resources within the country, and in particular to create synergistic linkages between tourism and the agricultural sector by promoting island foods and beverages supply chains, rural hospitality and agro-tourism (UNESCO, 2005). The conference also called for tourism organisers and other relevant stakeholders to monitor the impacts of tourism development to ensure that tourism development and social and environmental priorities are mutually supportive at all levels (UN, 2005b). The SAMOA document dedicated a chapter to sustainable tourism and its role in driving economic growth in SIDS. This called for various actions to be considered by SIDS among which include; (1) the development of policies that promote responsive, responsible, resilient and sustainable tourism inclusive of all peoples in SIDS, (2) diversifying sustainable tourism through products and services, including large scale tourism projects with positive economic, social and environmental impacts and the development of eco-, agro-, and cultural tourism, (3) designing and implementing participatory measures to enhance employment opportunities (in particular of women, youth and persons with disabilities), (4) promoting policies that allows higher inclusivity of local communities to gain benefits from tourism, and (5) establishing and maintaining, where necessary, the governance and management structures for sustainable tourism and human settlements (UN, 2014).

Cape Verde is one such example of development at the cost of the environment, where deforestation resulted from a need for wood as fuel, and the relative shortage of forest land to supply it. This in combination with prolonged drought and improper land use (overgrazing, crop cultivation on hillsides) have led to desertification and erosion (Republic of Cape Verde Ministry of Environment Agriculture and Fisheries, 2004). The region now relies on tourism for nearly half of its GDP in direct and indirect contributions, and nearly 40% of direct and indirect employment (The World Travel & Tourism Council, 2018). Complimenting this, the region is

now looking to capitalise on its strategic position between Europe, Africa, and South America by tapping into the luxury cruise market – through the construction of a new cruise terminal on the island of Sao Vicente. In order to complete this project, the country must rely on ODA from the Netherlands along with funding through private-public-partnerships (Macauhub, 2012).

It is here that we encounter the main topic of focus for this paper; the limited or total lack of attention paid to cruise tourism's role in the development of SIDS. For an industry that is postured as being critical to the tourism industry in many Caribbean and Pacific SIDS (discussed in the following section), there is little mention of how cruise tourism will contribute towards the sustainable development of these locations. The industry is mentioned only briefly in the MSI conference paper (UN, 2005a, p. 78) stating;

“Many small island developing States are also especially vulnerable to the risk of oil spills because of their proximity to shipping routes carrying large oil tankers and other vessels. Cape Verde and the Comoros, in particular, highlight this problem. Cruise ship discharges are also a threat to beaches and coastal areas as well as fragile ecosystems and coral reefs.”

Many studies have focused on the impacts of cruise tourism on the environment, society, and economy (Brida & Zapata, 2010; Carić, Klobučar, & Štambuk, 2016; Diedrich, 2010; Ghosh, 2012; Seidl, Guiliano, & Pratt, 2007; Vayá, Garcia, Murillo, Romaní, & Suriñach, 2018; World Bank Group, DFAT-Australia, & Carnival Australia, 2014), but few have given thought to the role of this steadily growing industry in achieving sustainability targets. For this reason, there is a need to explore how this industry fits into the literature on sustainable tourism in SIDS.

Cruise tourism and sustainable development

Cruise tourism has become increasingly viewed as potential niche markets for SIDS to capitalize on as a means of income and economic development. The industry reports consistent levels of growth year on year in terms of both revenue and passenger numbers (CLIA, 2018a). Cruise passengers represent one half of all international arrivals for most Caribbean SIDS, and the industry is also becoming increasingly important in Pacific regions such as Vanuatu - which experienced 133 ships visits in 2013. (DESA, 2014).

The UN encourages business sectors and industries to respond to SDGs by (1) conducting business responsibility and (2) pursuing opportunities through innovation and collaboration, (UN Global Compact, 2018). In order to address some of the environmental challenges brought about by cruise activity such as waste disposal and coastal degradation, many SIDS are working alongside the cruise industry to design fitting solutions. For example; in their commitment to the SDGs the Cruise Lines International Association CLIA (UN, 2017) announced the commitment of its cruise line members to the SDGs and has partnered with tourism bodies such as the South Pacific Tourism Organisation to show common interest and commitment to promote cruise tourism in the South Pacific and improve sustainable development of region (UN, 2017). Tourism is therefore strongly linked with achieving SDGs 8, 12, and 17 – ‘Decent Work and Economic Growth’, ‘Responsible Consumption and Production’ and ‘Partnerships for the Goals’, while simultaneously presenting a challenge for SDGs 12, 14, and 11 – ‘Responsible Consumption and Production’, ‘Life below Water’, ‘Sustainable Cities and Communities’. In addition to these goals, cruise tourism is highly relevant to SDG 14 – ‘Life Under Water’, as it pertains to the responsible use of oceans, seas, and marine environments (UN SDG 14).

There are, however, mixed views on the benefits of the cruise industry, with some commentators arguing that cruise tourism can be sustainable and sociologically harmless due to its formal organisation and spatially confined nature (Ritter, 1998; Paige, 1998), while others contest that issues arise with waste generation and disposal, together with pressures exerted on fragile environments and host communities (Brida & Zapata, 2010; Johnson, 2002).

Whether or not cruise tourism is a suitable development path for a country will be dependent on several factors including; (1) the attractiveness of the destination to cruise tourists, (2) the strategic position of the destination as a cruise destination, (3) the balance of costs and benefits brought to the destination by cruise activity (Bishop, 2010; UNDP, 2017). However, often to benefit from cruise activity, island ports must invest heavily in infrastructure such as cruise terminals (Klein, 2011). In a time of decreasing ODA (SDG Knowledge Platform, 2019), SIDS are having to increasingly rely on their own resources and must carefully plan their development projects if they are to meet the targets set by the SDGs.

Research Objectives and Questions

Based on the scientific gap identified, the purpose of this research was to contribute towards the understanding of the role of cruise activity for sustainable tourism development in SIDS, and to develop a better understanding of how sustainable tourism can be extended into the cruise industry, and how the industry can commit towards achieving the 2030 Sustainable Development Goals through a qualitative methods study on cruise activity based on a case study of Cape Verde's biggest cruise destination – Sao Vicente.

This focused mainly on the SDGs most relevant to tourism in SIDS – SDGs 8, 12, 14, and 17; and required an understanding of the social, environmental, and economic impacts of cruise activity around the world, an analysis of Cape Verde's attractiveness as a cruise destination, an overview of the country's commitment towards and completion of sustainable development goals to identify sustainability gaps applicable to cruise tourism contributions.

In order to address this, the research question that has been posed is;

How can cruise tourism contribute towards Cape Verde's achievement of the 2030 Sustainable Development Goals?

Guiding this question are sub questions aimed at understanding the various components related to this research area;

SQ. 1 What are the social, environmental, and economic impacts of cruise activity in SIDS?

As mentioned previously, tourism can both support and threaten a country's progress towards the SDGs. By analysing the impacts of cruising in SIDS one can better link this activity with specific SDG sub goals. Understanding the specific impacts brought on by cruise tourism will highlight which sub-goals will be affected the most in Cape Verde.

SQ. 2. What are the characteristics of the cruise industry in Cape Verde?

Establishing the characteristics of cruise activity in Cape Verde will give insights into the number of ships and passengers it receives each year, the country's capacity to handle sudden influxes of people, as well as the attractiveness and strategic positioning of the country as a cruise destination, which will determine the extent to which it receives future visits from cruise liners (European Commission, 2009).

SQ. 3. What is Cape Verde's attitude towards sustainable development goals?

Ensuring that tourism reduces its negative impacts and increases its positive impacts on the environmental and the socio-economic dimension of sustainability is the aim of the WTO and UNEP's (2012) definition of sustainable tourism. As the concept of sustainable development aims to address issues on multiple levels of society and the environment over the long-term, Destatte (2010) stresses the links between foresight and success in this field. arguing that; "the aim of foresight is sustainable development in a changing world" (p. 1575). It is unclear as yet how cruise tourism fits within the overall strategy of Cape Verde's sustainable development. It is necessary therefore to understand the current situation of CV sustainability,

its targets and goals. Understanding Cape Verde's attitudes and commitments towards the SDGs will assist in aligning the cruise tourism to their overall development goals. This information, in combination with the previous 3 sub questions will be the final step towards answering the main research question. As attitudes and goal setting are crucial for project success (Müller, 2009), Cape Verde's attitude towards the SDGs will determine the extent to which they are likely to achieve these broad and complex targets.

Research Framework

This study has an explorative character as it examines the potential contributions of cruise tourism to sustainable development. The sub-questions are reflected in the research framework (see Figure 1) and present the steps necessary for executing this study.

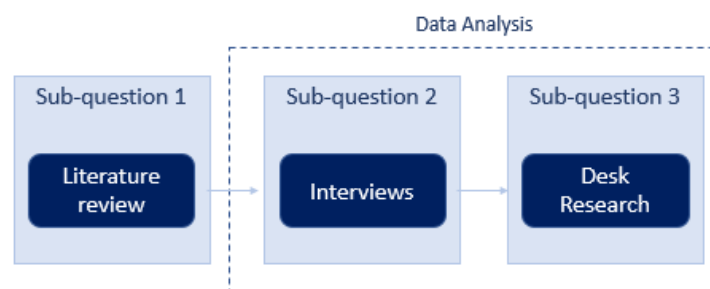


Figure 1 Research Framework

To answer the first question, the literature on cruise tourism impacts is consulted. In the literature it is first important to distinguish between the environmental, societal, and economic forms the impacts can take so as to link these with the appropriate SDGs. To get a comprehensive framework, these findings are complemented with literature on the cruise industry's commitments towards the SDGs. The next step is to give context to the research through a detailed examination of Cape Verde's cruise industry, and the country's biggest port destination – Sao Vicente. Sub-questions one and three lay the theoretical basis for the research, which is further-on added with empirical findings derived from the case study of Sao Vicente. To address the main research question, the results are validated and put in broader perspective by discussing their contribution to the existing literature. Lastly, based on the obtained insights, conclusions are drawn, and policy recommendations are formulated.

Scientific and societal relevance

This research has both scientific and societal relevance as it contributes to a broader understanding on sustainable tourism development and identifies the potential roles of the cruise industry which has so far had little mention in official strategic plans (UN, 2005b, 2014; United Nations, 1994). The research integrates social, environmental, and economic values into the paradigm of cruise tourism in the form of a partnership-driven framework. Furthermore, the research will help policy makers to include cruise tourism in their policy making and monitor its performance overtime. As a result, the role of this industry in achieving sustainability targets will be less abstract for policy makers as it is broken down in specific goals and sub-goals.

Literature Review

This chapter introduces the main themes discussed in the paper and gives a detailed review of the cruise industry, its growth, and impacts on port destinations. There are a plethora of terms describing the different sectors of the tourism industry. Some describe the type of activity; nature, cultural, historic, adventure, wildlife – others describe the location; beach, urban, rural – while still others describe the type of accommodation; cruise, resort (Honey & Krantz, 2007).

Sustainable Tourism

Sustainable tourism developed from the concept of ecotourism which first emerged in the late 1970s and early 1980s (Miller, 1993). The concept evolved out of the new global environmental movement that took root in the 1970s, as a reaction to the environmental and social damage caused by mass tourism and called for a rethinking of culture and education as elements of tourism. Broadly stated, the roots of ecotourism can be traced to four sources: (1) scientific, conservation, and non-governmental organization (NGO) circles; (2) multilateral aid institutions; (3) developing countries; and (4) the travel industry and traveling public (Honey & Krantz, 2007). This is now best described as; “Responsible travel to natural areas which conserves the environment and improves the welfare of local people.” (TIES, 2015). Ecotourism has since adopted social and economic ideals so as to be more compatible with the concept of sustainable development (Miller, 1993). This implies taking some of the principles and best practices of ecotourism and applying them to mass or conventional tourism businesses (Honey & Krantz, 2007). Sustainable tourism therefore 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 (UNWTO, 2005). According to the UNEP on tourism; sustainable tourism development meets the needs of the present tourists and host regions while protecting and enhancing the opportunity for the future. It is envisaged as leading to management of all resources in such a way that economic, social, and aesthetic needs can be fulfilled, while maintaining cultural integrity, essential ecological processes, biological diversity and life support systems (VolunTourism, 2006). This has three broad areas of concern: (a) tourism’s impact on the environment, (b) the equitable distribution of economic benefits to all segments of a tourist destination, and (c) minimising negative sociocultural impacts. The determination of what constitutes ‘responsible’ is vested with stakeholders involved in the development of tourism products and in those impacted by that development (Klein, 2011). Sustainable tourism is especially important along coasts where, largely because of the price of land, mass tourism development is standard practice (Honey & Krantz, 2007). Briefly this paper will outline coastal and marine tourism in order to highlight the similarities and differences between cruise tourism and these tourism types.

Marine and coastal tourism

Marine and coastal tourism are both among the oldest forms of tourism; spending time seaside was a favourite activity even in the Roman Era (Orams, 1999). In the 18th and 19th centuries, European aristocrats and, gradually, wealthy Americans took leisurely “grand tours” of the European continents’ natural and cultural features, including the Swiss Alps and the coasts of Italy, France and Spain (Ceballos-Lascurain, 1996). Beginning in the late 19th early 20th centuries, ocean liners began taking wealthy tourists between North America and Europe as well as on ocean cruises in the Mediterranean and the Caribbean (Honey & Krantz, 2007).

Marine and coastal tourism, although distinct forms of tourism, are very closely related due to their oceanic element (Tegar & Saut Gurning, 2018). Marine tourism covers a wide range of activities taking place in the deep oceans, the most predominant of which include cruising and sailing (Honey and Krantz, 2007). Other leisure water-based activities and nautical sports

(often carried out in coastal waters), are scuba diving, underwater fishing, water skiing, windsurfing, tours to maritime parks, and wildlife mammal watching (Diakomihalis, Lekakou, & Stefanidaki, 2009).

The World Wildlife Fund's (WWF) Marine Program hypothesises that marine and coastal tourism development are mainly driven by four sets of actors (Honey & Krantz, 2007):

- 1) Governments at the national and/or local level driving land-use development decisions for tourism. These are accompanied by infrastructure investments to support development, which is financed through both public institutions and private investors who can be influenced at the national, regional, and/or global levels.
- 2) Real estate developers (including financial institutions) who can operate at any level from local to global and are primarily private sector.
- 3) Tourism operators such as hotel chains and cruise lines.
- 4) Tourism consumers and consumer demand.

Yachts and cruises - which represent the largest segment of marine tourism - are responsible for high levels of water pollution due to their waste disposal practices, as well as air pollution (mainly due to gas emissions from cruise ships) (Tegar & Saut Gurning, 2018). Among the other impacts, visitors to coastal tourism destinations spur a demand for fresh seafood that can generate tremendous strains on already-stressed fisheries, while unwieldy volumes of cruise passengers can damage coral reefs and other sensitive coastal habitat (Voyer, Barclay, McIlgorm, & Mazur, 2017). While examples exist of small-scale, low environmentally impactful coastal 'ecolodges', much coastal tourism is generally on a larger scale and caters to more of a mass tourism market (Honey & Krantz, 2007).

The Blue Economy

As a counter to the social and environmental strains on marine and coastal systems triggered by development activities, the Blue Economy concept was developed (UN, 2015). This is in line with sustainable development and the utilization of natural resources based on environmental conservation for the purposes of; providing opportunities to develop more economically and environmentally sound investments and businesses, utilize natural resources more efficiently, produce more efficient and cleaner systems, greater products and economic value (Tegar & Saut Gurning, 2018). This challenges policy and decision makers to realize that the sustainable management of ocean resources will require collaboration across borders and sectors through a variety of partnerships, and on a scale that has not been previously achieved – a significant challenge for SIDS and Least Developed Countries (LDCs) who face significant limitations (UN DESA, 2019).

It was first conceptualized in the 2012 Rio+20 Conference, emphasizing conservation and sustainable management based on the premise that healthy ocean ecosystems are more productive, and form a vital basis for sustainable ocean-based economies (UN DESA, 2014). It was later in the SAMOA Pathway that SIDS recognized that "sustainable fisheries and aquaculture, coastal tourism, the possible use of seabed resources and potential sources of renewable energy are among the main building blocks of a sustainable ocean-based economy in SIDS" and expressed their support for Blue Economic strategies (World Bank Group & UN, 2017). The first Sustainable Blue Economy Conference later took place in Kenya in 2018, consisting mostly of ocean experts and activists discussing how to use oceans sustainably (UN DESA, 2019).

This concept has yet to fully develop, Blue Economy strategies for economic growth only feature in the Agenda 2030 goals as a combination of SDGs 7, 9, and 14 – 'Ensure access to affordable, reliable, sustainable and modern energy for all', 'Build resilient infrastructure, promote inclusive and sustainable industrialization and foster innovation', 'Conserve and

sustainably use the oceans, seas and marine resources for sustainable development' respectively (SDGCA and SDSN, 2018). The current conceptualization of a sustainable Blue Economy includes the following qualities (WWF, 2015);

- Provides social and economic benefits for current and future generations by contributing to food security, poverty eradication, livelihoods, income, employment, health, safety, equity, and political stability.
- Restores, protects, and maintains the diversity, productivity, resilience, core functions, and intrinsic value of marine ecosystems—the natural capital upon which its prosperity depends.
- Based on clean technologies, renewable energy, and circular material flows to secure economic and social stability over time, while keeping within the limits of one planet.
- Is governed by public and private processes that are; inclusive, well-informed, precautionary and adaptive, accountable and transparent, holistic, cross-sectoral, long-term, innovative and proactive

Additionally, the coastal and maritime tourism sector was identified as an area with special potential to foster smart, sustainable and inclusive solutions as part of the EU's Blue Growth strategy (European Commission, 2013). This strategy addresses some of the key challenges of enhancing cruise tourism's sustainability and the capacity for local tour operators to maintain competitiveness. Broadly, this strategy aims to;

- **Stimulate performance and competitiveness** by; improving knowledge on the coherence and comparability of coastal and maritime tourism statistics, addressing demand volatility, and overcoming sector fragmentation
- **Promote skills and innovation** through mainstreamed training policies and enhanced partnerships among education, training and youth institutions and organisations;
- **Strengthen sustainability** by addressing environmental pressures, promoting the attractiveness of coastal and marine archaeology, maritime heritage, underwater tourism, eco-gastronomic activities, and designing innovative solutions to address insularity within islands.

Cruise tourism

Cruise tourism has so far been discussed as a form of mass tourism that often combines aspects of both coastal and marine tourism – as the activities involved take place both at sea and ashore. Cruise tourism, probably more than any other sector of the mass tourism industry, is viewed as the antithesis to the concepts and practices of sustainable tourism. These high-volume, prepaid, packaged holidays – with their emphasis of sun-and-fun, over consumption, self-indulgence, and brief ports-of-call to allow tourists to buy local souvenirs or duty-free First World luxuries – are the polar opposite of the small-scale, locally owned, culturally sensitive, environmentally low-impact, and educational precepts of ecotourism (Honey & Krantz, 2007). An ecotourism alternative to the large ships of the major cruise lines are “pocket cruises”. This sometimes refers to short distance trips run by the mega-lines, it is also used to refer to smaller vessels that carry less than about 150 people (Honey & Krantz, 2007).

Paradigms of tourism types and sustainability

The social and environmental impacts of tourism are tremendous. Each year, this industry consumes nearly as much energy as Japan, produces the same amount of solid waste as France, and consumes as much fresh water as is contained in Lake Superior (Honey & Krantz,

2007). The figure below differentiates between the tourism types discussed so far, and how they fit within the paradigm of sustainable tourism (Bien, 2005).

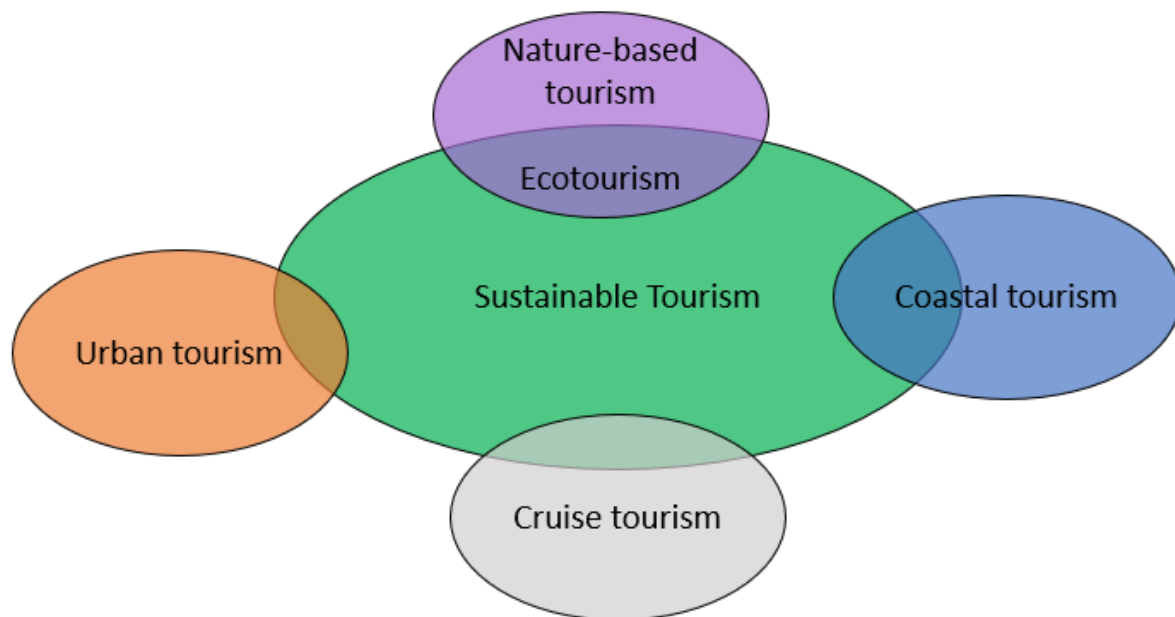


Figure 2 Tourism types in relation to sustainable tourism (Bien, 2005)

The figure shows that all ecotourism is sustainable tourism. At present, sustainable tourism includes parts of the urban, coastal and cruise tourism sectors. Other parts of the nature-based, urban, coastal, and cruise tourism are not sustainable. The goal should be to expand sustainable tourism practices into all tourism sectors, creating an industry that is environmentally, socially and economically sustainable. There is growing concern, however, that in a number of destinations – particularly areas of high biodiversity, with Marine Protected Areas, small rural towns, or strong ecotourism sectors – mass tourism cruise ships cannot operate sustainably (Honey & Krantz, 2007).

History and growth of the cruise industry

Since 1990, the number of people taking cruises has jumped over 7-fold (Cruise Market Watch, 2019b). Cruise ship numbers and size have increased dramatically. Nearly 40 new ships were built in the 1980s, another 80 new ships debuted during the 1990s, and by the end of 2018 there were 314 large cruise ships in service (Cruise Market Watch, 2019a). Ships size has increased from 500 – 800 passengers in the 1970s to newer ships, dubbed “floating cities”, which accommodate 2,600 to 3,800, with crews of 1,000 or more (Klein, 2003b). The biggest cruise ship ever is Royal Caribbean's recently-launched Symphony of the Seas, with a gross tonnage of 228,000, room for 6,680 paying passengers, plus an additional 2,200 crew (Royal Caribbean Cruises, 2018).

The global cruise industry has seen a steady and continuous growth in revenue and passenger capacity over the past 10 years (see below). In the last five years the demand for cruising increased 20.5%, making it the fastest growing category in the leisure travel market (CLIA, 2018a; The Florida-Caribbean Cruise Association, 2018). In terms of passenger origin, the highest number of cruise passengers come from the United States (52%), and Europe (26%), followed by other countries such as China, Australia, Canada, and Brazil.

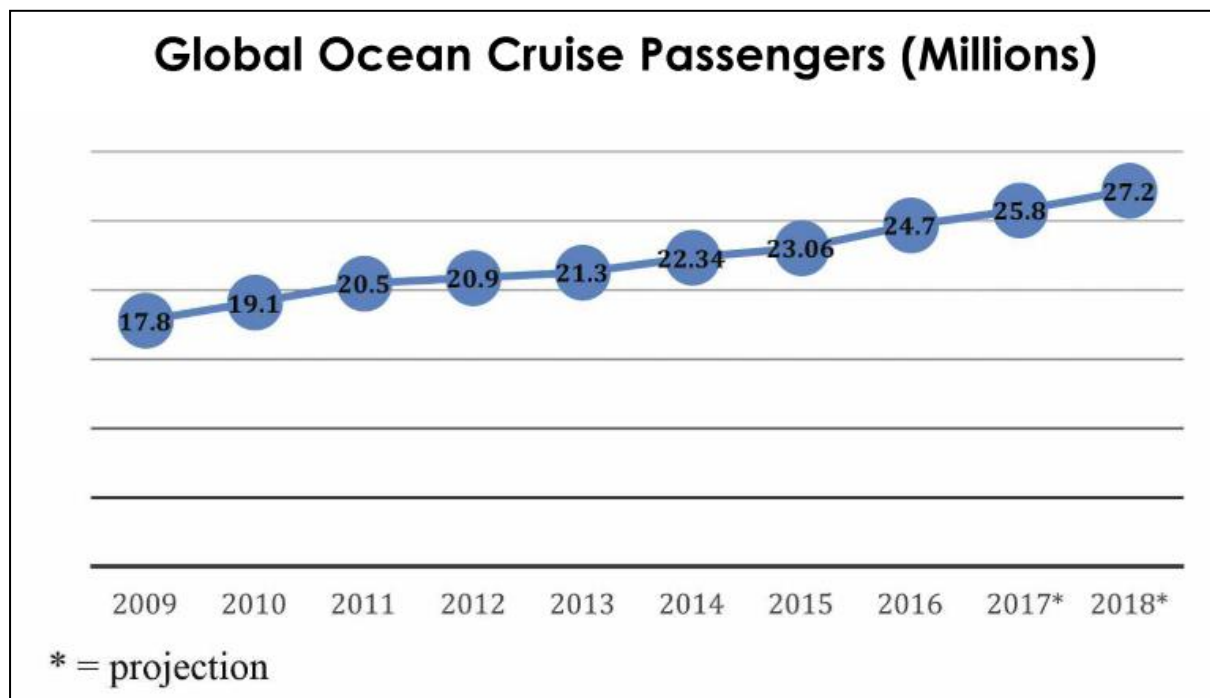


Figure 3 Global Ocean Cruise Passengers (Millions). Retrieved from The Florida-Caribbean Cruise Association (2018).

Although its popularity is growing around the world, cruise tourism is primarily a regional phenomenon as the bulk of cruise packages are sold for the Caribbean region (34.4%), followed by tours destined for the Mediterranean (17.3%) and Europe (11.1%), while cruises for African destinations comprise of only 1.3% of packages sold (CLIA, 2019). The Cruise Lines International Association (CLIA), founded by the major cruise companies in 1976, works closely with travel agents to promote cruises as less expensive and more glamorous alternatives to land-based hotels (CLIA, 2018b). The CLIA has 19 cruise line members that represent over 95% of the North American cruise industry – including Carnival Cruise Line, Royal Caribbean International, and Norwegian Cruise Line which in 2004 reaped USD\$ 14.3 bn in profit (Klein, 2003a). With 90% of cruise business generated through travel agents, CLIA claims that its primary objective is to assist its nearly 17,000 member agencies in capitalizing on the booming and profitable cruise market (Honey & Krantz, 2007).

The two largest cruise companies are Carnival and Royal Caribbean, the former in terms of customer base and the latter in terms of revenue (market watch). The bubbles in Figure 4 below represent different cruise ships coloured by their parent company, with focus set on the three largest companies.

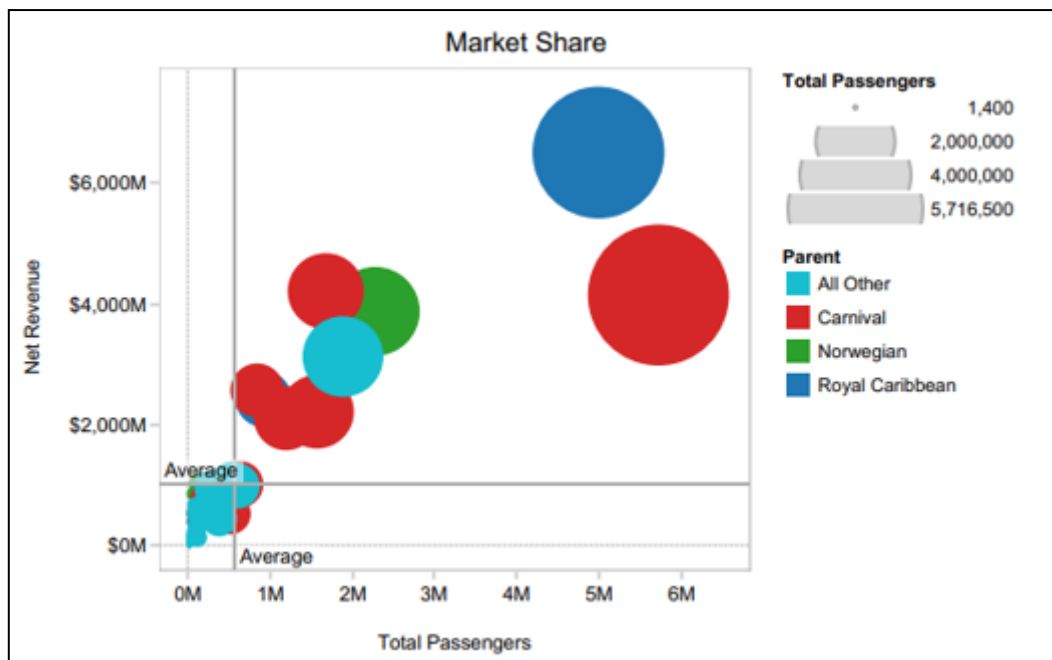


Figure 4 Market share of biggest cruise companies. Source: Cruisemarketwatch.com (2019)

The growth in the cruise tourism industry is due in part to substantial investments into the cruise ships themselves as being the major tourist attractors. More than 50% of port of call activities are sold on board by the cruise operators. More and more, cruises are meant to be experienced as 'all-inclusive' packages where passengers have all their wants and needs provided for them onboard (Uebersax, 1996 in Guiliano, Seidl, & Pratt, 2017). Cruise lines today have also introduced innovative onboard amenities and facilities, including cell phone access, internet cafes and Wi-Fi zones, rock-climbing walls, surfing pools, multi-room villas, multiple themed restaurants and expansive spas, as well as health and fitness facilities – all of which easily rival or surpass land-based options (Honey & Krantz, 2007). The economic impact of cruise tourism in island contexts is therefore questioned given the structural deficiencies that prevent port of call communities from competing with the all-inclusive onboard mechanisms capturing passenger spending and directing these revenues to allied firms. Given the greater reliance on tourism due to their significantly less diversified economies, the controversies over the cruise sector's deficiencies are magnified in small island developing contexts (Pratt & Blake, 2009). The academic literature regarding the impact of all-inclusive packages is widely contested. Definitional difficulties arise from the fact that all accommodation is inclusive to some extent. It is widely believed that all-inclusive packages cause large leakages, and that money flows into the destination economy can be less than the part stays in the origin countries (Mitchell & Li, 2017). Many studies on all-inclusive packages are conducted from the demand side, for example the satisfaction of tourists and the reasons of the popularity of the package. However, research on the contribution of all-inclusive packages on the local economy is scarce. For example, in most all-inclusive tours, only about 20% of total tourist spending goes to the local economy (Travelwatch, 2006 in Mitchell & Li, 2017).

As cruise tourism has grown, so has demand for terminal facilities. An issue of concern stemming from this is that ports are feeling increasingly pressured to construct new cruise terminals in order to compete with neighbouring destinations for business, but this scenario also appears to put port communities at an economic disadvantage relative to the cruise industry (Klein, 2011). Port cities without terminals build facilities hoping to attract cruise ships, while many existing ports are either expanding what they have or building new facilities. This was also the case of Prince Rupert and Campbell River in British Columbia: Campbell River's

C\$14 million terminal has been used rarely; Prince Rupert's C\$12 million terminal has had less traffic than originally projected and expects little or no traffic in 2012 (Klein, 2011). Some port projects are based on assurances from a cruise line, such as in Saint John, New Brunswick, which spent C\$12 million on a cruise terminal, specially built to accommodate Voyager of the Seas. It subsequently learned in August 2004 that one-third of its cruise ship passengers would be lost in 2005 because the ship was replacing Saint John with Bermuda (Klein, 2005). It appears therefore that, as destination governments spend or provide tax incentives to attract cruise tourism, they are forgoing opportunities to invest in and grow their more lucrative stayover sectors (Honey & Krantz, 2007).

To avoid this problem, an increasingly common arrangement is for cruise corporations to build and operate their own cruise terminals. For example; Carnival owns terminals in Cozumel, Roatan, Turks and Caicos, Long Beach California and elsewhere; controls a terminal in Savona, Italy; and in partnership with Royal Caribbean holds the concession for the cruise terminal at Civitavecchia (Rome) (Klein, 2011). The effect of these arrangements is that income generated from cruise tourism increasingly goes into corporate coffers rather than local purses, such as was seen in Kusadasi, where shops within the cruise terminal took business away from shops traditionally visited by cruise passengers (Klein, 2008).

While cruise companies are reporting continuous growth in revenue and passenger numbers, popular destinations such as Palma, Dubrovnik, and Venice have begun taking action to limit the amount of cruise activity in their ports. In response to local protests over intense cruise activity in Venice, the government has banned ships weighing over 1,000 tons waterways in the city centre (BBC News, 2019). In Palma, locals have begun to petition against 'mega-ship' tourism calling for a limit of one ship docking per day with a maximum of 4000 passengers disembarking at any given time (Burgen, 2019). This follows the footsteps of Dubrovnik which has capped cruise arrivals to a maximum of two ships and 5,000 visitors per day (The Maritime Executive, 2018). Residents and businesses in these areas are calling for limits on cruise tourism activities due to their undesirability and unsustainability, citing environmental damage, airborne pollution, and oversaturation of tourists in the city centre when cruise ships dock.

Tax and Flags of convenience

Cruise Lines have been able to contain costs through ownership, incorporation, and registration strategies. For example, Carnival and Royal Caribbean are both headquartered in Miami, but Carnival (generally considered to be an American corporation) is incorporated in Panama while Royal Caribbean, which originated in Holland, is incorporated in Liberia (Clancy, 2008). Star Cruises, the eighteenth largest in the world, is primarily Malaysian-owned and headquartered, but relocated its incorporation from the Isle of Man to Bermuda (Wood, 2000). In addition, cruise lines commonly register their ships in flag of convenience nations. Carnival registers nearly all of its ships in Liberia and Panama, Royal Caribbean International registers its ships in Panama and Norway, and Star ships are registered in Panama and the Bahamas. This creates a complex web of regulatory enforcement, providing significant tax advantages to cruise companies (CNN Money, 2003) and making environmental regulations difficult to enforce (Clancy, 2008).

In addition to tax advantages, this global strategy affords cruise lines the ability to avoid labour laws in both origin and destination countries – creating a tax haven arrangement that helps to avoid labour regulation and facilitates the process of lowering overall labour costs (Clancy, 2008). Wages and working conditions aboard cruise ships are highly segmented, with lower-level workers working as many as seven-day weeks for 12–18 hours per day, over 6–10 month contracts, and earning as little as USD\$ 500 per month (The War on Want / ITF, 2002). Although there are international maritime regulations relating to wages, working conditions, and overtime, enforcement is difficult. Despite increasing global criticism aimed at the cruise

industry's tax practices and the conduct of its operators, this has not impacted its continuing growth (Pinnock, 2014). Despite committing to the SDGs, as well as good corporate social responsibility, the cruise sector continues flying flags of convenience to avoid tax obligations and employing crew from developing countries at significantly reduced pay rates (Chin, 2008; Becker, 2015).

Societal impacts

While some commentators argue that cruise tourism can be sustainable and sociologically harmless due to its formal organisation and spatially confined nature, others contest that issues arise with waste generation and disposal, together with pressures exerted on fragile environments and host communities (Johnson, 2002). A frequent sociological issue associated with cruise tourism is overcrowding at one destination, together with pressures on cruise destination environments such as water consumption, use of chemicals and detergents, the impacts of recreational activities on wildlife such as disturbance and littering, and pressures on endangered species through exploitation for gifts (Brida, Bukstein, Garrido, & Tealde, 2012; Brida, Fasone, Scuderi, & Zapata-aguirre, 2014; Johnson, 2002). 'People pollution' refers to the point at which the carrying capacity of a port is exceeded (Baekkelund, 1999); and this has increasingly become a concern as the number of cruise ships arriving at port destinations has increased and the size of these ships have grown. Additionally, the quality of life for local and indigenous people is directly impacted by the sheer volume of visitors, as Sharma (2016) notes that once the social carrying capacity of an island is surpassed, cost of living increases along with overcrowding, traffic congestion, and noise pollution. As a result, a lower standard of living results for a significant segment of the population and an attitude shift occurs whereby the tourist is blamed for the majority of social problems (Baron, 1999). In small coastal communities, cruise ships can provide welcomed economic incentives that can bolster local economies. However, in some coastal communities, the magnitude and intensity of passenger visits can reduce social resilience and induce an economic regime shift that leads to rapid socioeconomic reorganization – the implications of which are a loss of economic diversity, reduced social resilience, and a loss of social capital (Guiliano et al., 2017).

Economic impacts

With regards to economic impacts, for example, CLIA (2017) reports that in 2016 cruise expenditures generated nearly USD\$ 126 bn globally and employment contribution of cruise sector expenditures accounts for over 1 million employees, which indicates 7.6% and 6.8% rise respectively, compared to 2015. The number of visits to a port of call is as important a driver of overall impact as individual spend. Cruise and cargo ships compensate ports for services provided to them however, it is considered a nearly universal practice to give docking priority to cruise ships over cargo ships, to the considerable detriment to the latter (Guiliano et al., 2017). This practice has caused the cruise tourism industry to compete for port space with the cargo shipping industry in Costa Rica at a significant cost to Costa Rican ports; as the amount of money injected into the local economy per cruise tourist is substantially lower than for other types of tourism; and cruise ships purchase relatively few supplies in Costa Rica; (Guiliano et al., 2017). Brida and Zapata (2010) further highlight that the economic contribution of the cruise industry depends on the category of the port: homeport or port of call. A home port is a destination from which ships begin and end, while a port of call is just an intermediate stop. Rhetoric from policy makers and the tourism sector promotes the notion that cruise tourism is generally 'high yield and low impact' at ports of call in Pacific island countries (Mihajlov, 2012).

Ghosh (2011) states that reality of economic gains from coastal tourism is established and the most real thing is the financial investment and profit. The issue therefore is not that ports do

not make money; studies have shown that they do (Business Research & Economic Advisors (BREA), 2009; Douglas & Douglas, 2004; Vayá et al., 2018). It is whether the income generated exceeds direct and indirect costs in the triple bottom line (Caric, 2010; Scarfe, 2011) and the degree to which economic benefits are distributed equitably between the cruise line and port and among the stakeholders and segments of society in the port. Using a global commodity chains (GCC) approach, Clancy (2008) investigated the political economy of the cruise ship industry in the Caribbean and considered the ensuing development consequences. His research showed that a small number of global cruise lines used a combination of producer-driven and buyer driven strategies to maximise on-board revenues and capture a very high proportion of economic surplus.

This has caused critics to argue that most of the benefits of tourism are overstated due to leakages. The cruise tourism model is integrated both horizontally (with the three major cruise lines mentioned) and vertically, so that profits remain with the cruise line. Cruise lines move aggressively to control every aspect of a cruise vacation, thereby reaping the profits associated with each step. This results in “leakage” (profits from services provided in the destination country ‘leak’ out to developed countries), and minimizes positive economic benefits for destination communities (Honey & Krantz, 2007). Little research has been done on additional sources for the cruise product, but most anecdotal evidence suggests that most regular supplies are provided by suppliers near home ports, and not by those in destination countries. Cruise lines in Dominica (Caribbean) for example, are reported to purchase nothing more than drinking water (Patterson and Rodriguez, 2004). The money passengers spend in port increasingly filters its way back to cruise companies through fees and contractual agreements (Clancy, 2008). In order to be listed in a ship’s promotional material, shops must often pay hefty fees. Klein (2003) reported that one Virgin Island upscale store paid a cruise line USD\$ 700 per port call to be listed in the ship’s promotional materials in 1994. Kroll (Kroll, 2004) similarly found that many merchants in Alaska paid between USD\$ 200 and USD\$ 500 per ship in order to be recommended by the line. Most passengers take shore excursions. These are major money makers for the cruise ship, which holds back 50% or more of what passengers pay on board for a tour. Some cruise lines have been observed to retain 80% of an excursion in Halifax, Canada (Sandiford, 2003), and up to 90% in Saint Vincent and the Grenadines (Caribbean Media Corporation [CMC], 2007). This creates two problems. Firstly; a passenger spending USD\$ 50 for a shore excursion expects a USD\$ 50 product, but the shore excursion provider only receives USD\$ 25 – putting the onus on the excursion provider to provide a quality product for passengers and retain a small profit of their own, while the cruise company walks away with its share (Klein, 2011). Unaware of the cruise lines cut, unhappy passengers will blame the shore excursion provider which can negatively affect not only their future business activity, but that of others in the supply chain (Klein, 2005). The second problem relates to the distribution of economic benefits within the port community/country. Using Belize as an example, a small handful of individuals is said to make money from cruise tourism, while the majority of Belizeans realise little if any benefit (International Conference on Responsible Tourism in Destinations, 2009). While cruise tourism has increased cash incomes dramatically for some, the majority remain at the periphery of this enterprise. Belize, which between 2000 and 2005 became the fastest growing cruise destination in the Caribbean, offered passengers a wide variety of natural, cultural, and historical tours rather than the usual fare of duty-free shopping. In 2006, cruise passengers accounted for 75% of arrivals to Belize, however, research by the Centre on Ecotourism and Sustainable Development (CESD, 2006) into the spending habits of tourists in the country revealed that not only did cruise tourists spend lower amounts of money per day as compared with land tourists (USD\$ 46 compared with USD\$ 96), the different trip durations meant that land tourists generally spent 14 times more money on their visits than cruise tourists (USD\$ 653 compared with USD\$ 46).

For the people of remote islands in the Vanuatu archipelago, cruise tourism promises opportunities for economic diversification, development and closer links to the mainstream economy. On average one cruise ship voyage to the islands of Vanuatu brings in USD\$ 260,000 and one ship passenger brings USD\$ 125 to their economies in direct expenditure. The impacts of these figures, however, are not evenly distributed, with some port stops capturing more spending per call and per passenger given the number of activities and shopping opportunities. This was seen by comparing two ports in Vanuatu; Luganville and Mystery Island – while average passenger and crew spend in Mystery Island is only 22% of spend in Luganville, the number of calls to Mystery Island render total annual impacts larger. Luganville, which has the alongside berthing facilities favoured by the industry, was scheduled to receive more visits in 2014 than 2013, but the state of repair of the wharf has been one of the factors that has slowed growth in ship calls (World Bank Group et al., 2014). Despite several decades of cruise ship visits, the development of long-term legacies and evidence of advances in living standards in Vanuatu remain unconvincing (Cheer, 2017). A key assertion here is that unless cruise tourism policy prioritizes the medium and long-term impacts (both financial and non-financial) of the industry, the interests of islanders will be surpassed by the commercial priorities of dual actors; multi-national cruise operators like Carnival and local elites who have managed to become the key contact points (Cheer, 2017). Despite these practices causing disharmony and annoyance in the island's small community, there still existed a view that cruise tourism is easier money than traditional, subsistence agricultural endeavours.

Coastal communities are inherently vulnerable, and although the total tourism expenditures of cruisers may be similar to other tourists, research suggests that the amount of money injected into the local economy per cruise tourist is substantially lower than for other types of tourism (Guiliano et al., 2017). The impacts of cruise tourism present a catch-22 in which economic gains must be balanced with the risk of losing economic freedom, cultural autonomy, and social resilience. Much like the reputation of land based “all inclusive” resorts, cruise companies appear to capture most of the economic returns from the cruise tourist experience, regardless of the role the local natural resource base and people might have played in it (Guiliano et al., 2017).

Environmental impacts

The International Maritime Organization (IMO, 2018), which is the United Nations specialized agency responsible for the prevention of marine pollution by ships reports that the maritime industry has the least environmental impact in comparison to other means of transport, when productive value is taken into consideration. It is unclear however if this is applicable across the industry, or if it is only valid for ships transporting goods and commodities rather than tourists. Many studies into the cruise tourism industry have revealed shocking results about the footprints left on the environment, economy, and society. For example, a study by Carić (2013) comparing the environmental footprint with the economic benefits of cruise tourism found that direct pollution related costs were 6 to 7 times larger than economic benefits for Dubrovnik and the whole Croatian Adriatic area. Due to a much larger cruiser tourist footprint, cruisers on a peak day created enormous environmental burden where 12,500 cruise guests generally polluted as much as 50,000 Dubrovnik residents (Carić et al., 2016).

Cruise ships comprise 12% of the world's commercial ships (Sutton, 2010), however, they pose a unique problem as they run auxiliary engines while in port to run their onboard power plant. To address this, a number of ports have introduced ‘cold ironing’ (a requirement that ships plug into the power grid for electricity while in port); however, the practice is still quite limited (Klein, 2008; Klein, 2009). A cruise ship produces a number of waste streams which can create serious health hazards and clean-up costs at port destinations, and which are not

commensurate with other types of tourism development available for some of these destinations (such as Costa Rica) (Guiliano et al., 2017). Common waste streams for ocean-going vessels include oily bilge water, ballast water, and air emissions from fuel (EC). Waste streams more specific to cruise ships include the volume of human waste and grey water (water from sinks and showers), solid waste, incinerator emissions, and ash (Copeland, 2008; US Environmental Protection Agency [US EPA], 2009). While new systems have been installed for treating roughly seven gallons of sewage and 90 gallons of greywater per person per day, these new systems also produce as much as 28,000 gallons of sewage sludge per week (National Marine Sanctuary, 2008). While land-based tourism also produces greywater and sewage, treatment systems on board cruise ships are often less effective given the limited space available for the full suite of treatment systems commonly found on land.

A cruise ship also produces a large volume of non-hazardous solid waste, including huge volumes of plastic, paper, wood, cardboard, food waste, cans, glass, and the variety of other wastes disposed of by passengers. The average cruise ship passenger is estimated to generate 100 gallons of wastewater each day, as well as 10 gallons of sewage and 2 kilograms of solid waste (Klein 2002, Copeland 2008, Herz and Davis, 2002). Burning and/or dumping most of this waste at sea is permissible under international law. The International Convention for the Prevention of Pollution from Ships (MARPOL) is charged with regulating waste at sea, but outside of plastic and oil, almost all materials may be dumped in international waters (Clancy, 2008). Glass and aluminium for example are increasingly held on board and landed ashore for recycling, but only when the itinerary includes a port with reception facilities; otherwise these are discharged at sea (Klein, 2011) Although cruise ships have reduced their volume of solid waste, the total amount is still significant – accounting for 24% of ocean-vessel created waste worldwide (Copeland, 2008).

Air emissions from ship engines are an obvious source of pollution, and a cruise ship's daily emissions are likened to the impact of 12,000 automobiles (Oceana, 2003). Ship emissions consist of mainly Nox (nitrous oxide), Sox (sulphur oxide), and Cox (carbon oxide) gases, and suspended particles. A study published in 2007 found that bunker fuel commonly used by cruise ships has on average almost 2,000 times the sulphur content of highway diesel fuel used by buses, trucks, and cars – and that one ship can make as much smog-producing pollution as 350,000 cars (Klein, 2011). This varies widely depending on the fuel being burned, however a more recent report by Transport and Environment (2019) on air pollution caused by luxury cruise ships in European waters revealed that ships owned by Carnival Corporation and PLC alone emitted 10 times more disease-causing sulphur oxide than all of Europe's 260+ million cars combined. The study showed that Spain, Italy, Greece, France and Norway were the most exposed this pollution due to their high concentration of cruise traffic. Even in areas with stringent mandates on marine sulphur fuel standards, sulphur oxide concentrations were higher than that of traffic throughout the city, as marine fuel is less refined, and shipping remains the least regulated transport sector for air pollution. Among the luxury cruise brands, Costa Cruises, MSC Cruises, P&O Cruises, AIDA Cruises and Royal Caribbean International were found to be the biggest emitters of sulphur oxide.

Ship bottoms are coated with antifouling paints that protect them from algal and other growth by preventing photosynthesis and reproduction through mutation of proteins and enzymes. Antifouling paint contains eco toxic metals such as copper and zinc that are emitted to the marine environment and accumulate in sediments and organisms such as fish and mussels which are then consumed by humans – a process with a long history of negative effects on environment and health (Thomas, Raymond, Chadwick, & Waldock, 1999). Finally, it is even argued that widely campaigned 'eco-cruises' are environmentally destructive as they are entering into the highly sensitive ecological niche, and the increased ground and water

transportation can lead to severe local air pollution and acid rain has negative impact on health and environment (Gössling, 2000).

Sustainability initiatives

The issues mentioned so far are not unique to cruise tourism but are consistent with criticisms of tourism in general. However, the growth of the cruise industry in particular has raised serious concerns in terms of environmental impacts. The UN encourages business sectors and industries to respond to SDGs by firstly conducting business responsibility and then “pursue opportunities through innovation and collaboration” (UN Global Compact, 2018). In contribution to UN’s Sustainable Development Goals (SDGs), the cruise industry can be a significant enabler for positive impact, distinctly on environmental goals (IMO, 2016). Sustainability improvements in cruise ships are mainly the result of two drivers: (1) Cruise lines’ sustainability initiatives and actions, which include technological improvements, strategies and policies. (2) Stringent regulations that are increasingly applied to cruising sector, aiming to decrease the environmental footprints of ships (Pakbeen, 2018).

In recent years the industry has made overtures to promote its commitment to sustainable cruise tourism development by demonstrating a renewed focus to ensuring more meaningful community participation in destination ports (CAU, 2015). The CLIA (2017) has announced the commitment of its cruise line members to the SDGs and as an example of partnership towards the goals. Partnership with research and ecosystem conservation projects has also been highlighted as favourable initiatives for many cruise lines. These efforts range from cooperation with individual researchers and collaboration with research projects, to clean up and conservation of maritime ecosystem of a selected area (Pakbeen, 2018). In the same vein, the UN has reported that CLIA cruise members and SPTO (South Pacific Tourism Organization) have both shown common interest and commitment to promoting cruise tourism in the South Pacific region and improve its sustainable development (SDG Knowledge Platform, 2018). Specific companies such as Costa Cruise Line have directly referred to SDGs in their sustainability reports (Costa Cruise Lines, 2017) and have shown the commitment of their companies to contribute to the SDGs. Similarly, TUI Group announced that the company, including its cruise line, is recognized as one of the most sustainable tourism companies with remarkable contribution to SDGs (TUI, 2018). Disney Cruise Lines underlines the importance of their role in SDGs and notes that the company uses the SDGs as a guideline to inform their sustainability policies, practices and engagement (Walt Disney Company, 2017). On the other hand, some companies such as AIDA Cruises and Norwegian Cruise Line indirectly refer to SDGs in their sustainability and responsibility reports (AIDA, 2017; Norwegian Cruise Line Holdings, 2017). The sustainability reports of these companies show similar approaches in addressing SDG 14 through energy efficiency, waste management, and biodiversity and ecosystem protection. Here, the regulations and rules urging the cruise industry to conduct the necessary practices may explain the similarity of the practices done by companies. In addition to adherence to regulations and industry-wide policies on waste management, the industry has committed to creating no-discharge zones in sensitive sea areas, and integrating them into their navigational charts. They have also increased their charity efforts to include contributions to conservation and community development, education and awareness among passengers and crew, and cooperation with local stakeholders (Crye, Plott, & Rossman, 2006).

Finally, companies have outlined various plans for addressing environmental issues pertaining to cruise activity. Many ships are also switching to more efficient power sources such as LNG to fuel their ships, however, the majority of innovations and practices are implemented on newly built ships while these technologies are not utilized on a considerable number of previously built vessels on operation (Pakbeen, 2018). In dealing with solid and liquid wastes,

cruise companies have conducted similar actions, for example, using wastewater treatment technologies, lowering water consumption, treating bilge water, and committing to regulations for onshore waste handling.

Tourism development in Cape Verde

Tourism in Cape Verde has been steadily growing since the 1990's, with a sharp increase in tourism receipts from 2006 onwards (Mitchell, 2008). In the period 2006–2011, the number of foreign tourists arriving in the country increased by 90%, while the number of overnight stays increased by 225% (Tomas López-Guzmán, Borges, & Hernandez-Merino, 2013). As the country is still in the initial stage of tourism development, residents are predominately optimistic about tourism – recognizing its positive impacts more than its negative consequences (Ribeiro, Valle, & Silva, 2013). Among the reasons for travelling, tourists visiting Cape Verde as a destination are motivated by the prospect of an seeing an exotic location, experiencing foreign cuisine, low prices, and the opportunity to learn about indigenous culture (Correia, Oliveira, & Butler, 2008). Tourists throughout the region consider the beach, weather, and hospitality of the local people to be the best aspects, followed by public safety and low prices (Tomás López-Guzmán, Borges, Hernández-Merino, & Cerezo, 2013), while in Sao Vicente specifically the aspects exerting the greatest influence on tourist satisfaction on the island of Sao Vicente are hospitality, hiking, and food (Tomas López-Guzmán et al., 2013).

Coastal and marine activities are the main tourism form on the archipelago, including coastal hikes, beaches, diving, fishing, and marine tours (Monteiro & Ferro, 2017). The development of tourism in Cape Verde has taken two different routes; the first of these characterised by a commitment to large-scale resorts, financed by European capital, where tourists stay in hotels on an all-inclusive basis (e.g. Sal & Boa Vista), while the second type is based on the construction and rehabilitation of small hotels; this activity is generally financed by remittances from emigrants and managed by the local community (Tomás López-Guzmán, Orgaz-Agüera, Martín, & Ribeiro, 2016). In spite of a continuously growing tourism industry, stakeholders ranging from policy-makers to people working in the tourist sector and ordinary Cape Verdeans share a distinct concern that tourism is not really benefiting the country as the benefits are 'leaking' away to the off-shore accounts of international operators and overseas companies supplying the tourist industry (Mitchell, 2008). As cruise activity has been an undeveloped part of the Cape Verde tourism sector there isn't yet any literature on the perceptions or impacts specific to this industry and its activities in Cape Verde, however figures by the head of ENAPOR indicated that cruise tourists arriving in Sao Vicente spent €45 per head on average, though this was also observed to be as low as €21 per head in 2011 as a result of low tourist satisfaction (Monteiro, 2014). The same report notes that tourists disembarking the cruise ships are obliged to sign a waiver regarding health and safety issues, advising them to eating, drinking and touring only at designated restaurants, brands and locations (Monteiro, 2014, p. 3).

Conceptual Model

As both islands and cruise companies are seeking to develop in more a sustainable manner, goal setting and partnerships will become a necessity if both are to realize the 2030 SDGs. The model below conceptualises the method by which cruise tourism's role in the sustainable development of islands may be achieved.

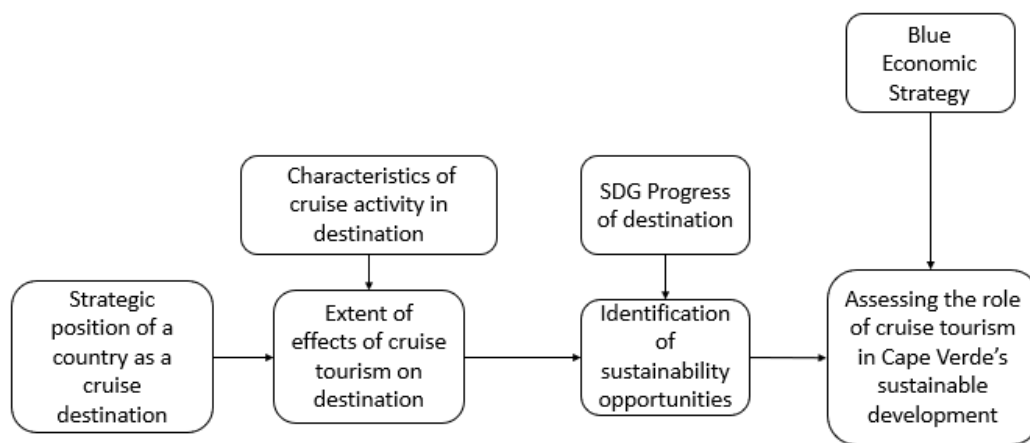


Figure 5 Conceptual model identifying cruise tourism's role in sustainable development

Methodology

The research took place mainly in Sao Vicente, Cape Verde – though time was also spent in Santiago for data collection. Tourism stakeholders in Santiago were first consulted in order to begin building the network of necessary interviewees for the research. These were selected based on their involvement with cruise tourism and shipping activities, where the aim was to speak with people in both private and public sectors. This research is designed around the main question: How can cruise tourism contribute towards Cape Verde's achievement of the 2030 Sustainable Development Goals? To answer the central question this research analysed the impacts of cruise tourism in port destinations around the world, the characteristics of the cruise industry in Cape Verde, and the progress and commitments Cape Verde has made towards the SDGs in order to highlight potential areas where further progress can be made with the aid of cruise tourism.

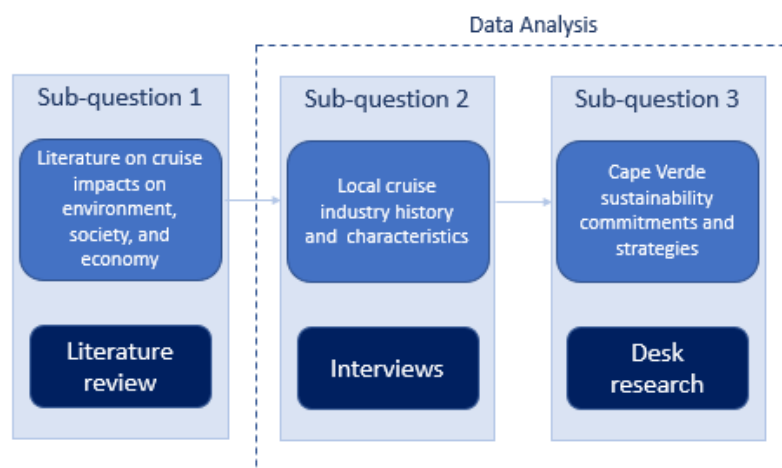


Figure 6 Methodology overview

Figure 6 gives an overview of the different methods to answer the research questions. The first sub question was concerned with a literature review. The other sub-questions and their accompanied methods are discussed in detail below. Due to the explorative nature of this study, a case-study analysis was selected as it enabled an intensive study of a single unit which resulted in gaining greater understanding about the regional impacts of cruise activity (Verschuren & Doorewaard, 2010). Consequently, the case-study analysis enabled an

evaluation of the costs and benefits of this tourism form, so that lessons could be drawn on the best governance practices.

Research Strategy

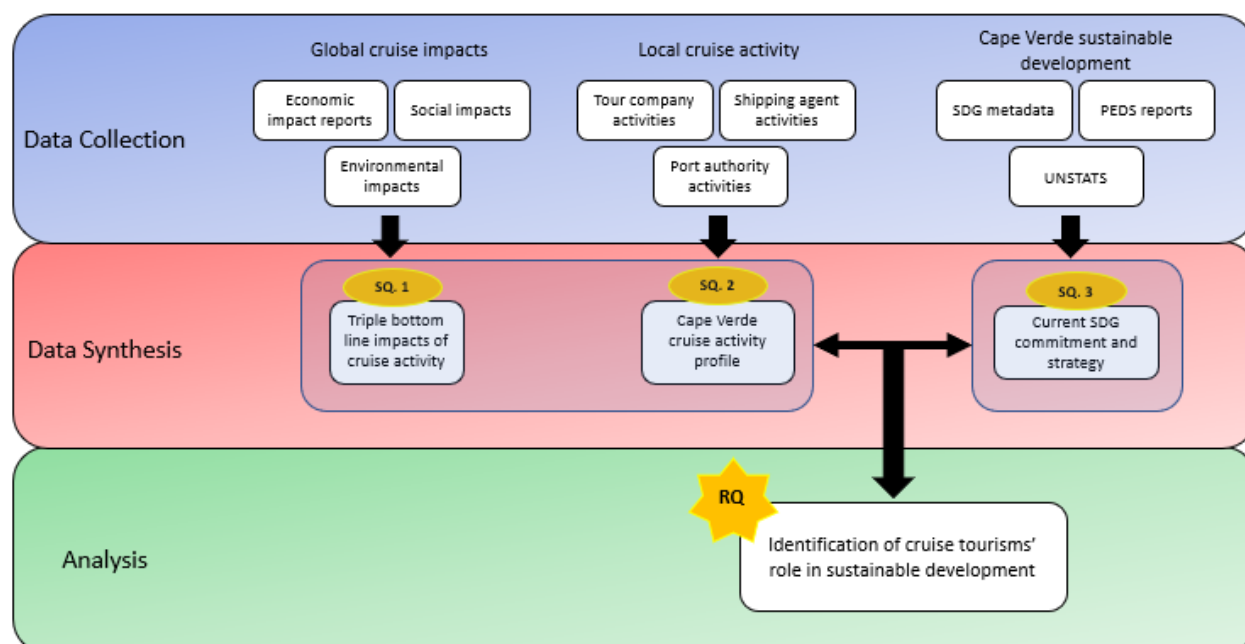


Figure 7 Overview of research strategy

This research employs an exploratory case-study style approach consisting of qualitative methods of data collection and analysis. This report's approach is based on past research, supplemented by diversified data inputs collected from a range of sources, including national accounts, semi-structured interviews, government reports, as well as tourism satellite reports.

The information regarding the impacts of cruise tourism on port destinations was obtained through a thorough literature review of cruise activity in the last 30 years, published in both company report and academic journals (Blake, 2008; Brida et al., 2012; Business Research & Economic Advisors (BREA), 2010; Cheer, 2017; Clancy, 2008; CLIA, 2019; DESA, 2014; Ghosh, 2012; Klein, n.d., 2011; Pratt, 2015; Transport & Environment, 2019; Vayá et al., 2018). In simple terms, sustainable development can be seen through three main aspects: economic growth, social inclusion and environmental protection (UNDAF, 2017), and as such these were the overarching topics examined when reviewing the literature.

Semi-structured interviews were chosen as the main data collection tool due to their less formal structure, allowing for a two-way dialogue to evolve between the researcher and participants (Hennink, Hutter, & Bailey, 2011). This allowed respondents the opportunity to raise issues outside of the conceptual model, allowing space for inductive theory forming and analysis from the emic perspective (Bruges & Smith, 2009). The target audience was chosen from a range of tourism stakeholders on both local and national levels, which is discussed in detail further on.

Desk research was needed to create the picture of Cape Verde's sustainability strategy. This became apparent during the interview process as interviewees, apart from government figures, had little information on national sustainable development plans and strategies. To make up for this, desk research was conducted on SDG metadata alongside reports issued by the UN, WTO, and the Government of Cape Verde.

Selection Criteria

To meet the criteria of this study the research required a SIDS with an established cruise tourism industry, a reliance on ODA, and a strategy for sustainable development driven by tourism activity. Given the historic reliance on ODA to drive development in SIDS, it was felt that this should be included in the study as it raises the importance of cruise tourism for the region's development and validates the necessity for deeper research into the topic of sustainable tourism.

Justification for Cape Verde

The government of Cape Verde has identified cruise tourism as an a potential niche market for the country's development (Monteiro & Ferro, 2017). Given its strategic location between Europe, America, and Africa – Cape Verde is perfectly situated as a transit port or home port. The government has therefore incorporated the development of the cruise tourism sector into its national strategy for Blue Economy growth and developed plans for cruise terminal facilities to be constructed on the island of Sao Vicente (Governo de Cabo Verde, 2017a). However, in order to achieve this, the Cape Verdean government has had to request further ODA for the construction and maintenance of the terminal facilities. To this end, the Government of Cape Verde has partnered with the Netherlands and the OPEC Fund for International Development (OFID) (Governo de Cabo Verde, 2017a), and Dutch government has allocated almost €13 million towards the project (Rijksdienst voor Ondernemend Nederland (RVO), 2011).

Justification for Sao Vicente

Given the timeframe of the research, data restrictions, and logistics of visiting each island for studying – Sao Vicente was chosen as the main area of focus. The island met the research criteria as it has an established cruise tourism industry; receiving the most cruise ships in the region which allowed for greater data availability (ENAPOR, 2019). As mentioned above this island is also the chosen location for the new terminal facilities and will benefit the most from the new infrastructure.

Data Collection

In order to both evaluate the cruise industry in Cape Verde and its implications for sustainable development, a mixture of desk and field research were required.

Literature review

First a literature review was conducted to establish the current state of the cruise industry, its growth, and the impacts it has on port destinations. This comprised of academic studies following cruise activity in ports around the world, as well as reports published by cruise industry actors such as CLIA, and reports by third party organisations such as the Business Research & Economic Advisors (BREA). This was done not only to get an overview of the industry, but to support the final evaluation.

Semi-structured Interviews

In addressing the second sub question data on the history of cruise activity in Cape Verde was needed to establish the history of cruising, ship and passenger arrival trends, and what interactions these have with the local community and industry. The target audience of the semi-structured interviews came from a range of tourism stakeholders on both local and national levels. These were conducted with the port authority (ENAPOR), shipping agents such as Opono and Agencia Nacional de Viagens (ANV), tour companies offering excursions to cruise tourists (such as Aventura and Intercruise), freelance local tour guides, and the non-profit Cruising Association of Cape Verde.

To assess the strategic position of Sao Vicente as a cruise destination, it was necessary to understand the characteristics of the location such as;

- Current facilities at Porto Grande
- Number of islands visited by cruise ships
- Historic passenger numbers
- Historic ship arrival numbers
- Seasonality of cruise activities
- Time spent in port by cruise ships
- Final destination of cruise ships

This information was then compared with reports classifying port types based on their facilities, location, and cruise visits such as the European Commission's study on tourist facilities in ports (European Commission, 2009).

The main purpose of the interviews was to discuss the characteristics of cruise activity in Cape Verde, collect data related cruise activity such as levels of engagement, services rendered, resources used, profits garnered, and perceptions of cruise activity. In total 14 interviews were conducted with the aforementioned stakeholders.

Desk research

In the final phases of the project, desk research was conducted to ascertain the attitudes and commitments of Cape Verde towards the SDGs using metadata from UNSTATS as well as strategic sustainable development reports by the government of Cape Verde (PEDS, using the Portuguese acronym), as well as the UN and WTO. This was used to track and measure Cape Verde's commitment to sustainable development and outline the means by which it will do so, with a focus on tourism activities.

Limitations

The main limitation found was the seasonality of cruise activity in the region – limiting the availability of data sources (such as cruise ships and passengers) and approaches (such as surveys field observations). Region specific data from this industry are scarce and not homogenous, with the best data bases coming from North America, the Caribbean and Oceania - while for destinations outside the Americas and Oceania it is very difficult to find the exact number of cruise passengers (Brida & Zapata, 2010). Language barriers were also taken into consideration when conducting this research. The native languages of Cape Verde are Portuguese based creole which differ from island to island, however many of those working in the government and tourism sectors speak English, Portuguese or French (Stewart, Irwin, Wilson, 2017). As such the questions in the questionnaires were carefully worded to avoid confusion and ambiguity, using a translator when necessary.

Geographical context

Cape Verdean area and economy

Cape Verde is a Low-to-Middle income archipelago in the Atlantic Ocean, made up of 10 islands with a population of approximately 550,000 although there is a significant diaspora, estimated to be almost double the number of domestic residents (IOM, 2018).



Figure 8 Map of Cape Verde

At the end of the 20th century Cape Verde's economy was fundamentally based on remittances sent by emigrants, official development aid coming from other countries, and income generated by air traffic. Due to its positive performance in human development and economic growth, the country graduated from Least Developed Country status at the end of 2007 (UNDAF, 2017). However, as a result of this graduation the levels of ODA and concessional lending to the country fell drastically and, coinciding with the 2008 financial crisis, economic development in Cape Verde slowed substantially (see below UNDAF, 2017).

Tourism has been a substantial driver of growth and development within the region, with the GDP contributions of tourism activities increasing from 4.2% to 44.9% in 2017 (WTTO, 2018). Vanegas and Croes (2003) have previously estimated that for every 45 new tourists to visit the country, one new job is created directly and 0.9 indirectly. The industry is also characterised by a high proportion of foreign owned facilities. The African Development Bank (2014) identified significant tourism potential for Cape Verde's development through ensuring its long-term sustainability, increasing its revenues, improving its benefits for the local people, as well as preserving the natural capital on which the tourism sector is based. The direct contribution of tourism to the GDP of Cape Verde in 2017 was CVE 30.2bn (USD\$ 311.0m), representing 17.8% of total GDP and is forecast to rise by 3.1% in 2018, and to rise by 5.4% pa from 2018-2028, to CVE 52.5bn (USD\$ 540.4m) – 19.7% of total GDP in 2028 (The World Travel & Tourism Council, 2018). This sector accounts for 15.8% of total employment in the Cape Verdean islands. Tourism is so important for the Cape Verdean economy that approximately 90% of foreign direct investment is targeted at the tourism sector (Costa, 2011). It must be noted, however, that 94.7% of the regional tourism flows focus on just four islands; namely Sal (57%), Santiago (20.1%), Boa Vista (9.9%) and São Vicente (7.6%) (Costa, 2011).

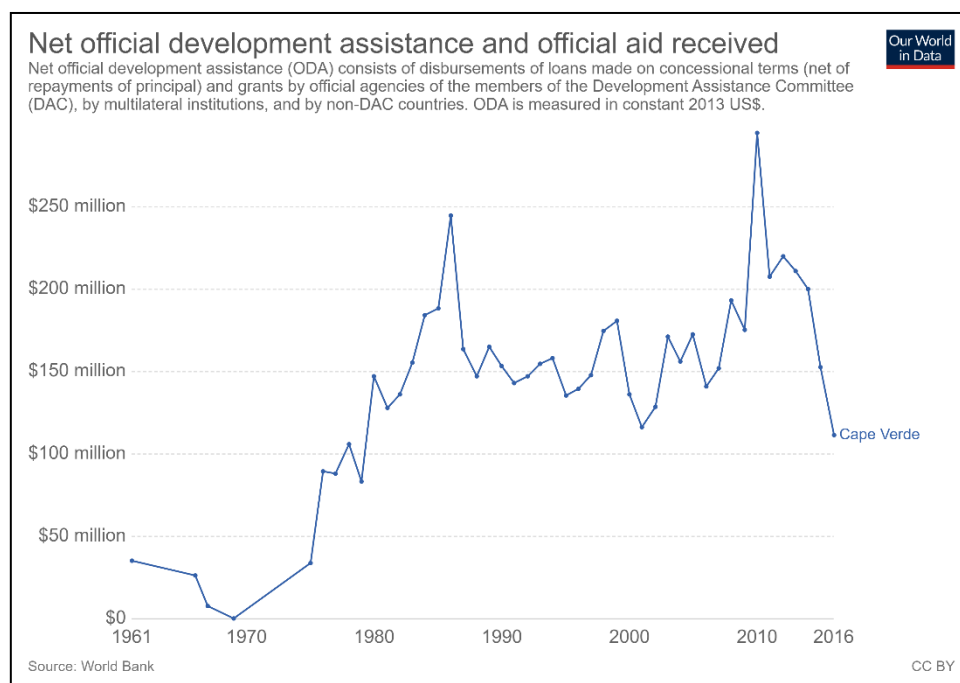


Figure 9 Net official development assistance and official aid received by Cape Verde
(Source: SDG Tracker, 2019)

Sao Vicente, Mindelo, and Porto Grande

Sao Vicente is home to the most important port in the country. The economy of this island is based on the service sector, subsistence farming (due to the lack of rainfall), fishing, and on an industrial sector which, although it possesses a great potential for seafood processing, is still incipient (Tomas López-Guzmán et al., 2013). Tourism plays a major role in sustaining lifestyles and aiding growth and development within the island. However, the hospitality workforce is ill qualified which is producing an internal migration to the other islands, ones with better tourism development such as Sal and Boa Vista (Mitchell & Li, 2017). The island's capital, Mindelo, is the country's cultural and artistic centre; hosting the most prestigious music festivals and the largest carnival celebration in Cape Verde. Ecotourism on the island is becoming particularly important since the geological features of the island make it well suited to this. The main characteristic of this island, as it has happened historically with the other islands of the country, is the importance of migration because Cape Verde is still one of the

countries most dependent on migration due to the small domestic market and an isolated location (Carling, 2004).

Cape Verde's private sector is nascent and essentially concentrates around trade and tourism (African Development Bank, 2014). The main economic activities in Sao Vicente are manufacturing, fishing, maritime, and tourism – however tourism only accounted for 3% of the regions tourist overnight stays in 2015 (Monteiro & Ferro, 2017). In the same year, Sao Vicente was home to 20% of active companies in the region and accounted for 18% of regional private sector employment.

Porto Grande is the main port for the country of Cape Verde. The port typically sees between 5 and 13 vessels arriving per day, with figures peaking at 43 vessels in a day (MarineTraffic, 2018). These arrivals consist of:

- Passenger crafts (43.10%)
- Cargo ships (18.39%)
- Fishing boats (15.52%)
- Sailing Vessels (11.49%)
- Tankers (5.17%)
- Special crafts (4.02%)
- Pleasure crafts (2.30%)

Vessel turnover is high at Porto Grande, with the median time spent in port ranging from 0.2 to 0.7 days. In 2014 the port accounted for over 300,000 tons of domestic cargo movement, and over 400,000 tons of international cargo movement (Monteiro & Ferro, 2017).

Results

Cape Verde cruise industry characteristics

Cape Verde has been preparing for cruise ship arrivals since 2002, with the shipping agency Viking initiating formal business with cruise companies. Interviews revealed that the push for the new cruise terminally came internally – from the Government of Cape Verde, and that industry is perceived as being beneficial to Cape Verde by the government and tourism operators, though there is consensus from these operators that more government support is needed to protect the industry from foreign companies, and that further capacity building is

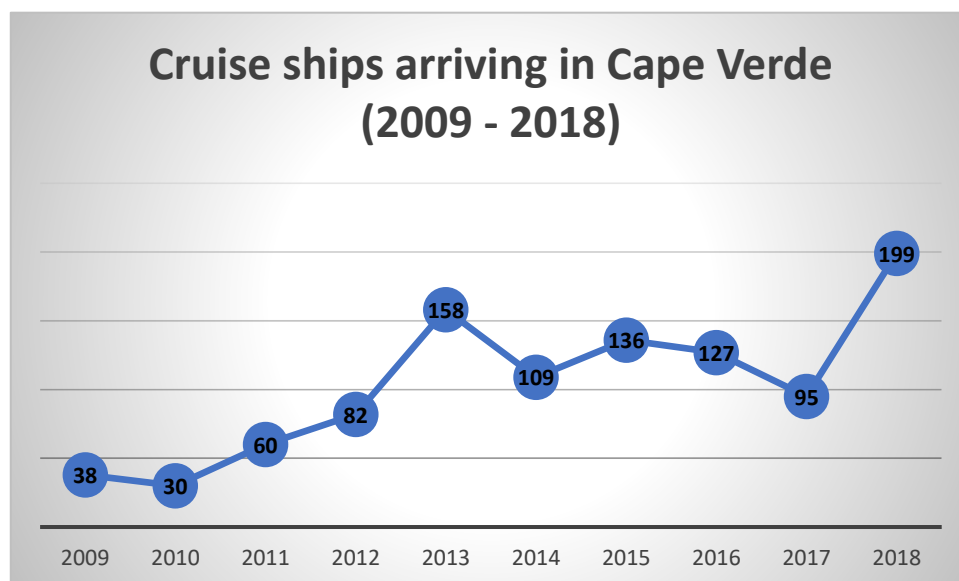


Figure 10 Cruise ship arrivals to Cape Verde 2009 - 2018 (Source: ENAPOR, 2019)

needed in the form of tourism and hospitality training. Cruise ships will stop at one or more ports in Cape Verde on route to other destinations such as Brazil, Barbados, France, Senegal, or Spain. The vast majority of these ships will only stay in port for a few hours before continuing their journey.

Despite the 2008 economic crisis, the number of cruise ships arriving in Cape Verde has quadrupled in the last 10 years, with 2018 recording the highest number of arrivals – 199 ships in a year. In the same sense the number of cruise passengers to the region has grown sharply, with over 60,000 passengers arriving in 2018.

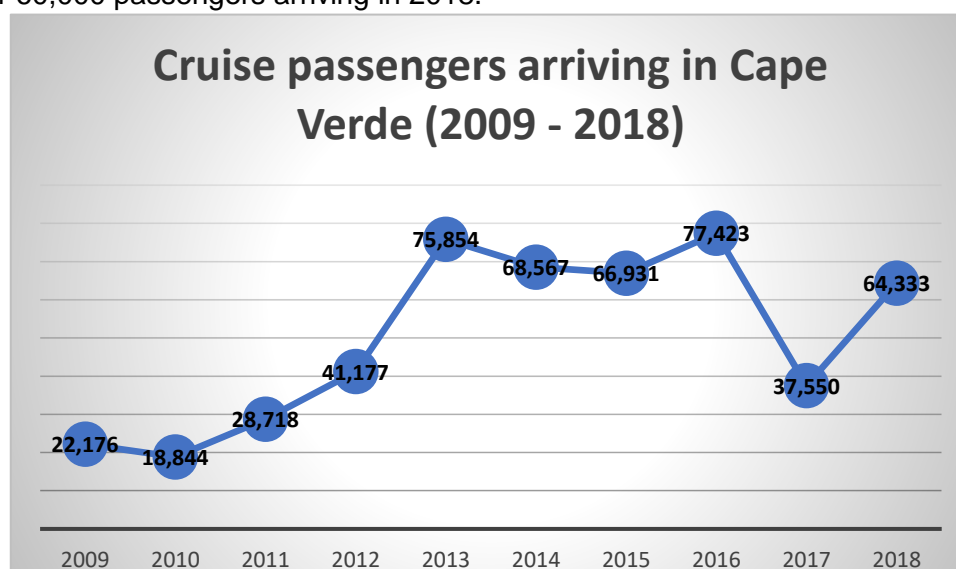


Figure 11 Cruise passenger arrivals to Cape Verde 2009-2018 (Source: ENAPOR, 2019)

The majority of cruise ships go to Porto Grande (Sao Vicente) and Porto Praia (Santiago) as these are the only two ports that can facilitate the arrival of cruise vessels. In recent years there has been a growing interest in the other island ports, especially Porto Novo in Santo Antão. In order to visit these other islands, cruise ships will drop anchor off the coast and transport passengers to shore by boat. However, this increased interest in the other islands has not yet been reflected in the passengers, with the exception of Porto Novo which outstripped both Porto Grande and Porto Praia in 2018 in terms of passenger numbers.

Ships arriving at a port must pay a tariff for the availability and use of the entry, parking and exit systems of ships, the availability of infrastructures for ship and cargo operations, and the safety and conservation of the environment, in accordance with the Regulations of Cape Verde Port Operations in force (Ministry of Maritime Economy Cape Verde, 2019). For cruise ships this is equivalent to €80 + €0.01 x Gross Registered Tonnage (GRT) x the number of days spent in port. Therefore, a large cruise ship such as the Norwegian Star (Appendix 2) of the Norwegian Star company, which weighs in at 91,740 GRT and stays in port for 9 hours would pay a €997 tariff for each port of call. This would be at the upper end of tariffs paid to ports in Cape Verde as cruise ships arriving in port tend to be smaller than the Norwegian Star (ENAPOR, 2018). In addition to this, Cape Verde has set out attractive tariff discounts for smaller cruise ships and cruise ships that visit multiple ports (Ministry of Maritime Economy Cape Verde, 2019). Cruise ships weighing less than 3,000 GRT will benefit from a 25% reduction of the tariff fee, and cruise ships which carry out more than 6 calls in the ports of Cape Verde will benefit from a 20% cumulative reduction, starting at the sixth call. Fees are also set out for pilotage and mooring/unmooring of ships into port, as well as for waste removal – both fees being dependant on this size of vessel and amount of waste. Below are the flat rates for these services, collected from the 2019 Tariff Legislation set by ENAPOR for these services.

Service	Size	Fee
Pilotage	< 3,000 GRT	€395
	> 3,000 GRT	€500
Waste Removal	< 5m ³	€87
	5 – 10 m ³	€130
	10 – 15 m ³	€190

Table 1 Tariffs on ships entering Cape Verde ports

Cruise ships and passengers arriving to the islands will be tended to by one of four companies – Agencia Nacional de Viagens (ANV), Aventura, Inter cruise (TUI), or Viking. These four companies work alongside ENAPOR and will take turns tending to cruise arrivals depending on the port of call. For example, Viking operates only in Porto Grande, but must share arrivals with the other three companies on a rotational basis. Meanwhile, the other three operate on multiple islands and will take turns tending to arrivals unless they are TUI flagships, in which case they are tended to only by Inter cruise. This arrangement allows TUI to manage over 60% of incoming cruise vessels on Sao Vicente (ENAPOR, 2018), which has caused feelings of antipathy from local tour and shipping companies, who feel that the government offers little in the way of protection from foreign companies. These four represent only the formal shipping and touring agencies in Cape Verde – once passengers venture outside of the port area they are greeted by many more guides representing informal tour companies, such as Highland Tours in Sao Vicente. These informal companies claim to undercut the cruise companies in terms of price, though this has not yet been formally established. Neither formal nor informal tour companies directly employ tour guides – which are comprised of freelancers around the islands. In order to work as a tour guide, one must be registered with one of the two cruise associations in Cape Verde - Comunidade Cabo-verdiana de Cruzeiros (3C) de Santiago, and Comunidade Cabo-verdiana de Cruzeiros (3C) de Sao Vicente. These associations are independent of the government and work towards improving the cruise tourism industry in Cape Verde. At the time of research, these associations were working towards hosting workshops to train tour guides, and towards creating a registry of official tour guides for cruise tourism in Cape Verde.

Passengers arriving to Cape Verde will either engage in an excursion offered by the tour company appointed on that day or will choose to walk around the port cities for the duration of their ship's stay. Before leaving the cruise ships, tourists are obliged to sign a commitment term regarding health and safety issues, which states that tourists are allowed to eat, drink and tour only on designated restaurants, brands and locations (Monteiro, 2014). Appendix 1 is of a typical tour itinerary as provided by one of the tourism companies. Passengers typically disembark from the cruise ship and go straight to the tour vehicles waiting for them in port, which bring them straight back once the excursion is complete. In this brief 3.5-hour period, passengers spend over 2.5 hours on their bus – giving few opportunities to interact with local businesses, restaurants, and souvenir shops. However, on occasion the tour busses may stop at a designated gift shop before being brought back to their ship. Research indicates that currently insufficient demand is generated by cruise passengers in the local transport and restaurant industries; with only 25% of taxi drivers changing their itineraries based on cruise ship arrivals, and 55% of restaurants noticing no change in customer movement on cruise days (Tavares, 2017). ENAPOR estimates around 70% of passengers cruise passengers disembark onto Sao Vicente, with each passenger spending between €30 and €40, though spending figures as low as €21 have been observed (Governo de Cabo Verde, 2017a; Monteiro, 2014). If we assume these figures are correct and that the behaviour was consistent with every stop, it can be estimated that cruise passengers in 2018 had a direct economic

impact between €267,540 and €509,600 in Sao Vicente, and between €945,695 and €1,801,324 in the entire Cape Verde region – representing 0.003 – 0.006% of the direct tourism impacts in Cape Verde for that year (WTTC 2018). This however does not take into account any leakages, for example – if tourists should take excursions with foreign companies rather than local ones.

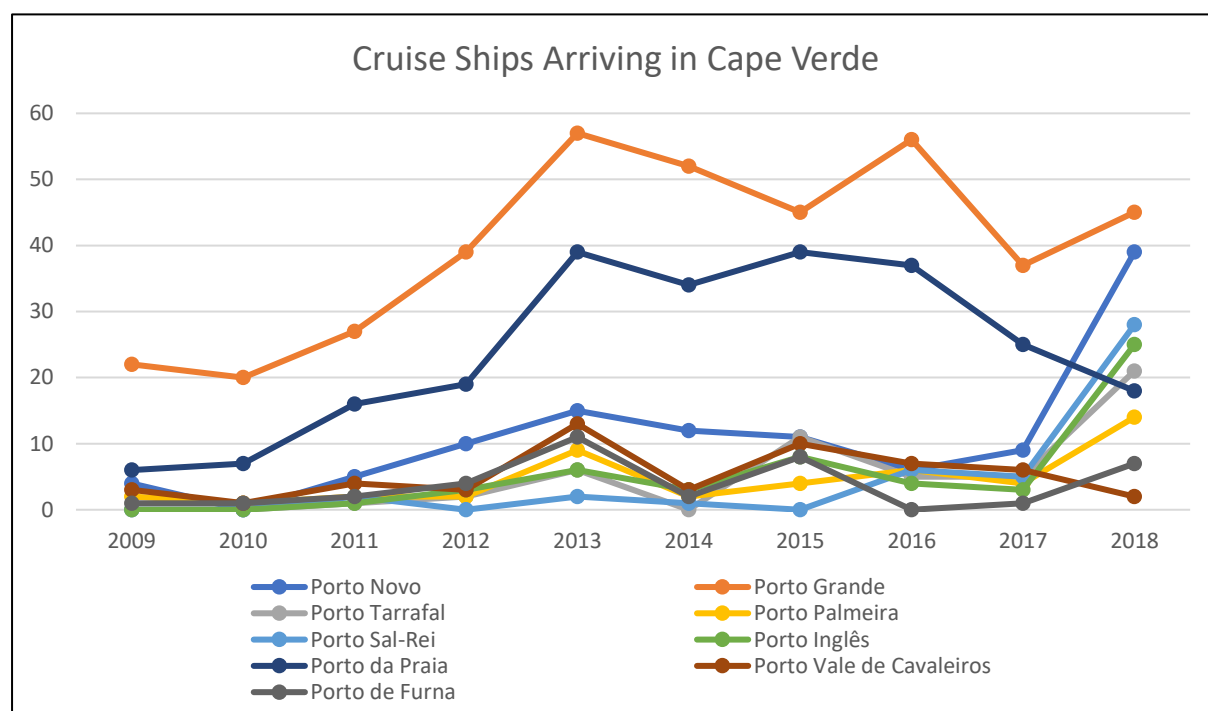


Figure 12 Cruise ship arrivals to Cape Verde (2009-2018)

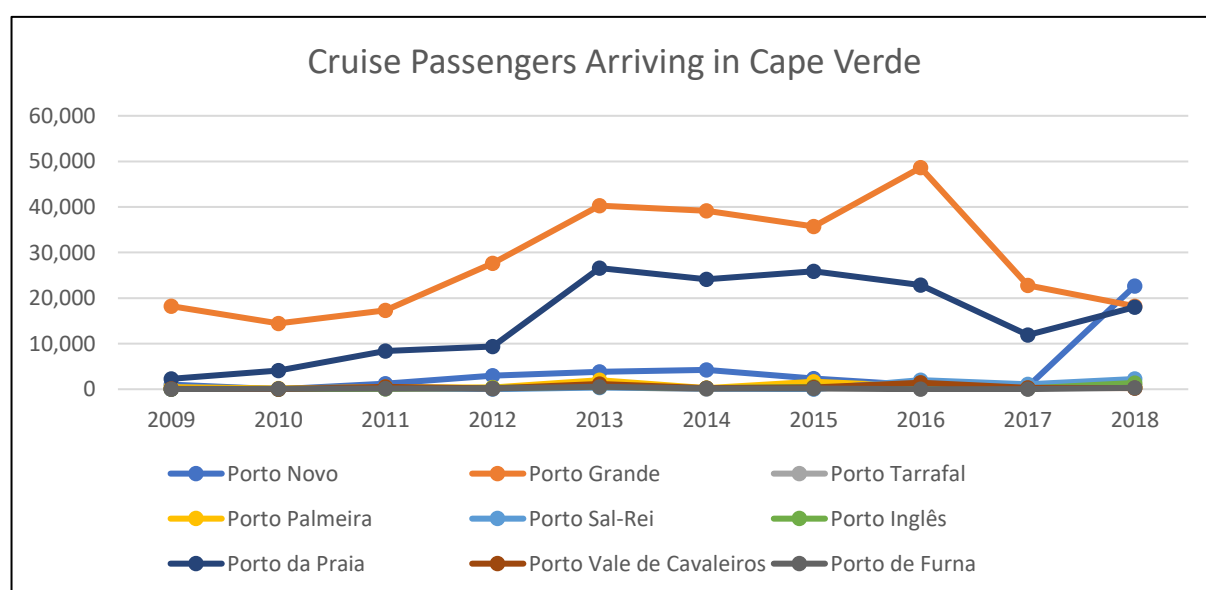


Figure 13 Cruise passenger arrivals to Cape Verde (2009-2018)

As it stands, Porto Grande can be characterised as a classic port destination – having low attractiveness, high accessibility, and low port facilities (European Commission, 2009). By extending the jetty to allow space for an extra cruise ship to dock at port, Sao Vicente can increase the number of cruise ships (and passengers) it sees per year and thus increase its revenue stream. However, for ports having this status the maximum that can be achieved in the short-medium term is to become a pure turnaround port – whereby the island is a stopping point on the journey, but experiences higher volumes of ships which stay for up to 12 hours instead of the usual 8 hours experienced by transit ports (European Commission, 2009).

Cape Verde sustainability history and strategy

In terms of economic strategy, Cape Verde has put the tourism sector and related services sector in the centre as the main driver for economic growth due to the considerable contributions these make to the GDP (UNDAF, 2017). Despite reduced levels of ODA and economic development post-2008, Cape Verde achieved most of the UN Millennium Development Goals (MDGs) by 2015 (UNDAF, 2017). In its ongoing commitment to the SDGs, and in order to support the monitoring and evaluation of the indicators – the statistics bureau of Cape Verde now aligns its statistical yearbooks into seventeen themes, taking into account the 17 objectives of sustainable development (INECV, 2017). Being an island nation surrounded by almost 900,000 km^2 of ocean (INECV, 2017), Cape Verde is especially concerned with responsible marine use as outlined in SDG 14 – “Conserve and sustainably use the oceans, seas and marine resources for sustainable development”. In 2015, the Government of Cape Verde adopted a charter on Blue Growth and Economy (The Ocean Conference, 2017a). This landmark charter placed the Ocean and Blue Economy at the core of national development, outlining a strategy that promotes resilience and sustainable marine resource utilization, in terms of economic, social and environmental sustainability (Gonçalves, 2017). Committing to this charter implies that biodiversity and environmental sustainability considerations will be mainstreamed within the sector development visions and plans outlined in the Blue Growth Strategy, the latter of which include aquaculture; artisanal, industrial and sports fisheries; energy generation; port construction and related industrial developments; and maritime traffic (The Ocean Conference, 2017a). In 2017, the island of Sao Vicente hosted an International Conference Dialogue on Blue Growth and Economy, organized with the support of FAO and the African Development Bank as part of FAO "Blue Growth" initiative and the "Blue Economy" Network (The Ocean Conference, 2017b). At the Mindelo Conference, all the major themes that support sustainable development in African SIDS were addressed, among which include; responsible fisheries, aquaculture, food security, marine environment, climate change, and the fight against poverty (The Ocean Conference, 2017b). The Mindelo Conference produced a declaration adopted by the 7 Ministers and Representatives of 24 countries present”.

Focusing on tourism, one of the primary goals of the Cape Verdean government is ensuring that tourism keeps “within the margins of its fragile ecosystems and that economic growth spreads to the poorest sectors of the population” (United Nations Partnerships for SDGs platform, 2012). Aligning this with SDG 8 – “decent work and economic growth”, the region aspires to be a sustainable tourism destination, ensuring the satisfaction of the needs of both local communities and tourists and respect for natural and cultural values. The government has therefore launched the first National Tourism Master Plan and a Code of Conduct defining objectives for managing resources and competitiveness within the sector, which drive the archipelago's economy and include measures for saving water, management of power resources, use of renewable energy, Waste and waste water treatment and optimization of environmental resources (United Nations Partnerships for SDGs platform, 2012).

Following parliamentary elections in 2016, the new government of Cape Verde reiterated its commitment to the SDGs and sought support from the UN to develop a roadmap to place the SDGs at the centre of its national development planning process (UNSDG, n.d.). In their efforts towards achieving these goals, the government of Cape Verde established the Strategic Plan for Sustainable Development 2017-2021 (PEDS, using the Portuguese acronym). This sets challenging targets for the 2017-2021 period based on four objectives: (1) making Cape Verde a circulating economy in the mid-Atlantic (2) ensuring economic sustainability, (3) ensuring social inclusion and environmental sustainability by reducing inequalities, (4) strengthening sovereignty, creating democratic value, and aligning diplomacy towards development issues in the country (Governo de Cabo Verde, 2017c). This strategic plan sets out the vision and objectives of the government and establishes 39 ambitious sustainable development targets for the period 2017-2021 for the of Cape Verde. One such plan – the Blue Economy Sector Report (Governo de Cabo Verde, 2017a) outlines the regions strategy towards sustainable marine and maritime activities including; shipping, fisheries, tourism, and inter-island transport. Cape Verde's Blue Economy strategy report is, however, closer aligned to Blue Growth – any ocean based economic activity – rather than the more holistic Blue Economy framework. Though these reports mention increasing social inclusion and reducing environmental impacts, they do not outline any specific strategies towards these.

The strategy refers back to cruise tourism throughout the report but gives little indication of how the observed negative impacts of this industry will be addressed. The benefits outlined include job creation (during the terminal construction phase), revenue generated from tourism activities, and the suggestion that cruise tourism can trigger longer periods of stay from passengers.

Though the strategy is short term, it is underpinned by a longer-term vision for the country's sustainable development for the period 2018-2030 that is aligned with the 2030 sustainable development agenda and the SDGs as means to build a better future (Governo de Cabo Verde, 2017b). The table below summarizes the intended outcomes for PEDS by the year 2022.

Area	Outcome in 2022
Environment	The population of Cabo Verde, particularly the most vulnerable, benefit from enhanced national and local capacity to apply integrated and innovative approaches to the sustainable and participative management of natural resources and biodiversity, climate change adaptation and mitigation, and disaster risk reduction.
Society	The population of Cabo Verde, particularly the most vulnerable, have improved access to, and use more, quality health, education, food security and nutritional services, and benefit more from social and child protection services, that are inclusive and gender sensitive, throughout life cycle.
Economy	The population of Cabo Verde of working age, particularly women and youth, benefit from decent work through economic transformation in key sectors, that leads to more sustainable and inclusive economic development.
Governance	The population of Cabo Verde benefit from a system of democratic governance and public administration that is more effective, transparent, participative, and gender sensitive.
Partnerships	The population of Cabo Verde, particularly women, youth and children, benefit from increased human security, improved social cohesion, and a responsive and inclusive justice system and law application institutions, that lead to the fulfilment of human rights

Source: UNDAF(2017)

Table 2 PEDS 5 strategic pillars

The total estimated cost of the PEDS is just over USD\$ 96 million, and its impact on the development of Cape Verde will depend largely on the UN's ability to acquire the resources to finance it, particularly in the context of a Middle-Income Country, including national and diaspora resources, and south-south and triangular cooperation (UNDAF, 2017).

Cape Verde SDG progress

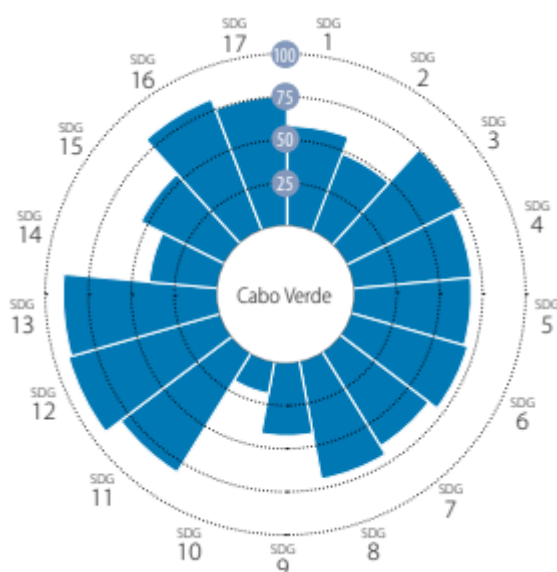


Figure 12 Cape Verde SDG performance

Cape Verde currently ranks 5th in Africa, and 96th in the world for SDG performance (SDGCA and SDSN, 2018). The country performs strongest in SDGs 11, 12, 13, and 16; and weakest in SDGs 2, 10, and 14 (see figure). According to the UN, the country is seeing a positive trend in SDG achievement from 2018-2019, has hit nearly all targets for SDG 12 – “Responsible Consumption and Production”, faces major challenges for SDGs 3, 9, and 14 – “Good Health and Well-being”, “Infrastructure and Innovation”, “Life below Water”, and faces normal to significant challenges for the remaining targets (summarized below).

Cape Verde SDG progress			
SDG	Description	Current Assessment	Current Trend
1	No Poverty	Significant challenges	Moderately improving
2	Zero Hunger	Significant challenges	Moderately improving
3	Good Health and Well-being	Major challenges	Moderately improving
4	Quality Education	Significant challenges	Stagnating
5	Gender Equality	Significant challenges	Moderately improving
6	Clean Water and Sanitation	Significant challenges	Moderately improving
7	Affordable Clean Energy	Significant challenges	Moderately improving
8	Decent Work and Economic Growth	Significant challenges	Information unavailable
9	Industry, Innovation and Infrastructure	Major challenges	Moderately improving
10	Reduced Inequalities	Significant challenges	Information unavailable
11	Sustainable Cities and Communities	Significant challenges	Information unavailable
12	Responsible Consumption and Production	SDG achieved	Information unavailable
13	Climate Action	Challenges remain	On track for maintaining SDG achievement
14	Life Below Water	Major challenges	Moderately improving
15	Life on Land	Challenges remain	Stagnating
16	Peace, Justice, and Strong Institutions	Significant challenges	Moderately improving
17	Partnerships for the Goals	Significant challenges	Moderately improving

Table 3 Cape Verde SDG progress, Source: (SDGCA and SDSN, 2019)

Tourism SDGs

SDG 8

While there was not adequate information to measure the progress of SDG 8 in 2019, the information for the years 2017-2018 shows significant challenges for the 5-year average GDP growth per capita (%), and major challenges remaining for the employment-to-population ratio (with a stagnating trend), and the prevalence of modern slavery (victims per 1,000 population) (SDGCA and SDSN, 2019). Major challenges are still presented to the country in its unemployment rate, which is stagnating in performance.

The growth rate of Cape Verde's real GDP per employed person has slowly recovered since the 2008 financial crash. By 2016 this was just below the global average of 2% growth per annum (SDG Tracker, 2019), and grew to 6.9% in 2017 due to economic growth through a reduction in the employed population (Governo de Cabo Verde, 2018). In 2015, the majority (58.8%) of informal non-agricultural jobs were done by women, and the unemployment rate reached 12.2% in 2017, a reduction of 3.2 percentage points from 2016 (Governo de Cabo Verde, 2018).

SDG 12

In terms of nationwide consumption and production, Cape Verde has not yet adopted a Sustainable Consumption and Production Action Plan, but acknowledges that this is one of its key pillars of survival – taking into account the country's economic, social, environmental,

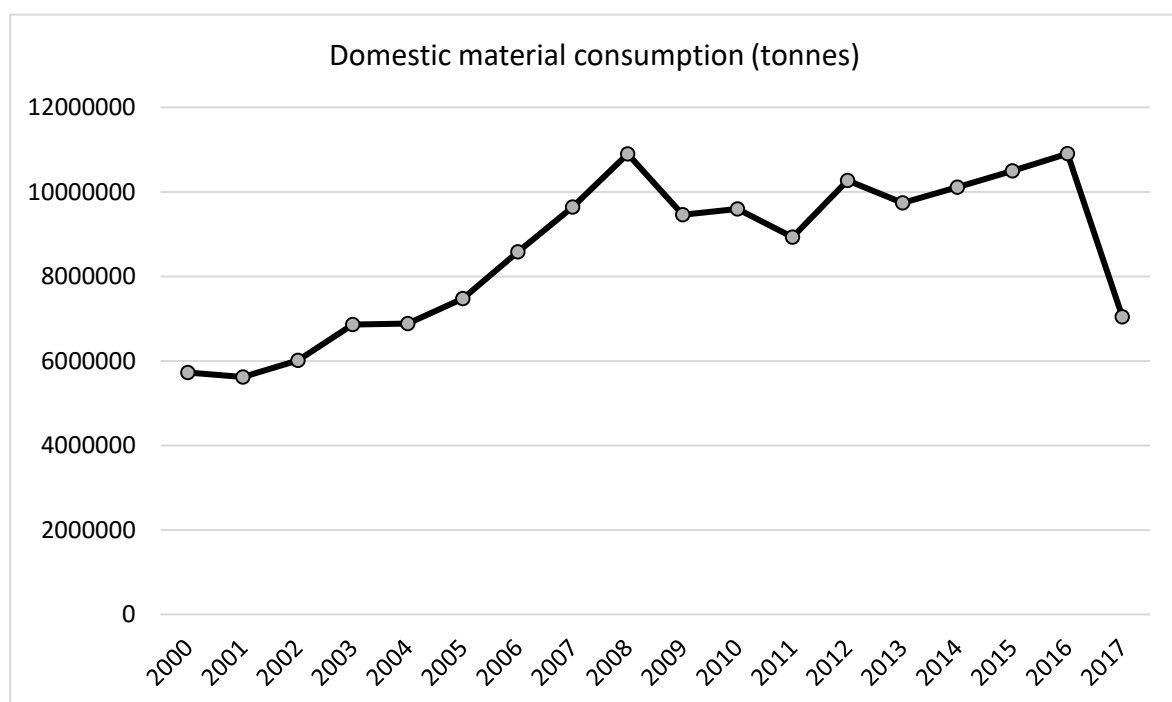


Figure 13 Domestic material consumption (tonnes) in Cape Verde. Source: UNSTATS

climate and energy vulnerabilities, and the fact that it needs to import at least 80% of its food products (Governo de Cabo Verde, 2018). Despite not having a clear-cut strategy to address consumption and production, Cape Verde has performed admirably towards achieving SDG 12; achieving 4 of the 12 sub-goals and cutting down on the overall domestic material consumption to their lowest levels in 12 years (UNSTATS).

In order to address waste generated from tourism activities the government of Cape Verde, in alignment with United Nations guidelines, is drafting the Great Options of the Sustainable Development Strategic Plan for Tourism – taking into consideration that the sustainable

development of tourism is based on five pillars, namely economic, social, environmental, cultural and peace, security and respect for the people (Governo de Cabo Verde, 2017b).

SDG 14

One of the weakest performance areas for Cape Verde, performance for this goal is hindered by high percentages of inadequately managed plastic waste, and low size of areas under protection for their importance to marine biodiversity (SDGCA and SDSN, 2019). However, the country is on track to achieving the sub-goals relevant to the protection of fish stocks, and the Ocean Health Index for clean water. The ocean is a crucial element of the Cape Verdean identity, and the country has been taking measures to protect its marine key biodiversity areas since 2004 (UNSTATS). Though this still encompasses a relatively small area, the government plans to promote actions aimed at preventing and significantly reducing marine and maritime pollution by establishing plans for the cleaning and organization of seafarers (Governo de Cabo Verde, 2018).

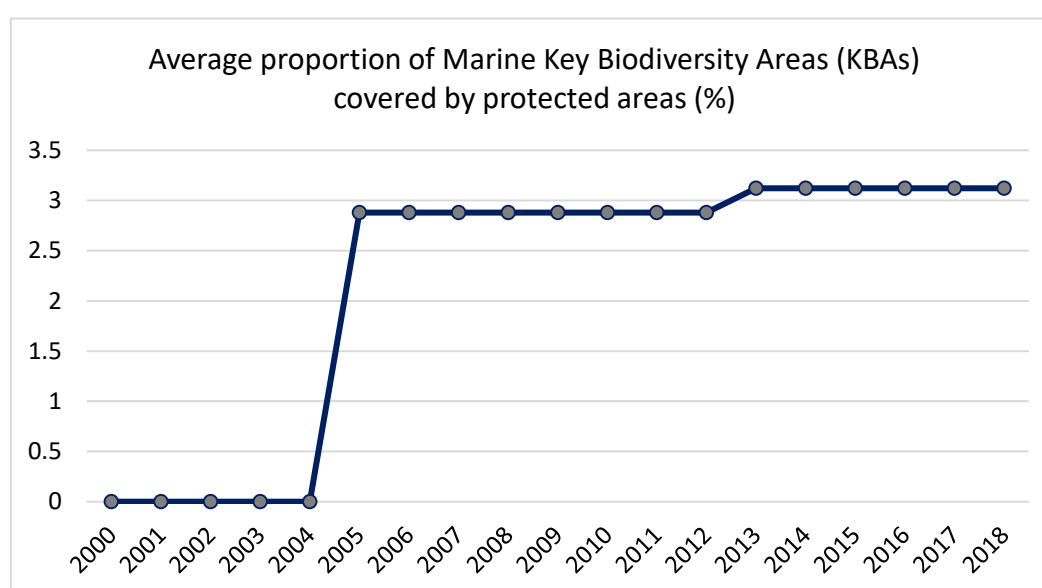


Figure 14 Average proportion of marine KBAs covered by protective areas, Cape Verde. Source: UNSTATS

The PEDS Blue Economy Sector Report by the government of Cape Verde (Governo de Cabo Verde, 2017a) details many of the marine and ocean based economic development projects for Cape Verde, stating that investments into the sector will lead to higher standards of waste treatment and disposal from ship activity, but does not explain how this will be achieved nor makes any reference to specific kinds of waste such as grey water.

SDG 17

With regards to partnerships for the goals, Cape Verde is set to achieve the sub goal for tax revenue as a percentage of GDP (SDGCA and SDSN, 2018). Progress towards this goal is hindered by major challenges faced on the levels of customs and duties on imports, and stagnating health and education spending by the government. The country is also seeing a decline in governmental statistical capacity; however this still ranks higher than most African areas (see below).

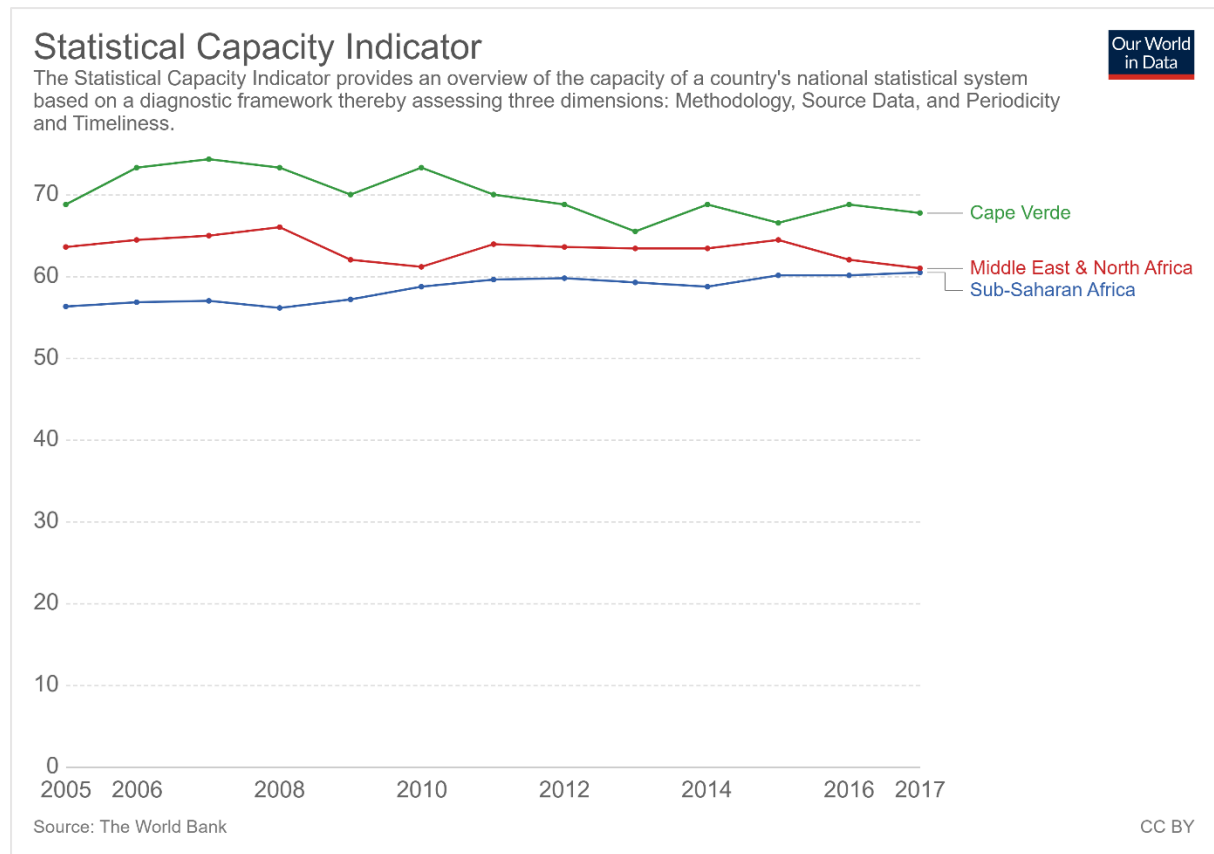


Figure 15 Statistical Capacity Indicator

Seeking sustainability

As stated by Honey (2007), the current structure and practices of the cruise tourism industry are at odds with the concept of sustainable tourism. Though the industry has been making efforts to reduce its carbon footprint (CLIA, 2017; Costa Cruise Lines, 2017; Walt Disney Company, 2017), there remain a myriad of issues needing to be addressed. The framework below details activities that the cruise industry can take towards becoming more sustainable and the SDGs it can work towards achieving, but it must be stressed that this can only be achieved in unison with both Cape Verde and governing bodies such as the UNWTO and WWF.

This was developed based on the framework of the Blue Economy that has so far been developed by WWF, European Commission, and the World Bank (European Commission, 2013; World Bank Group & UN, 2017; WWF, 2015)

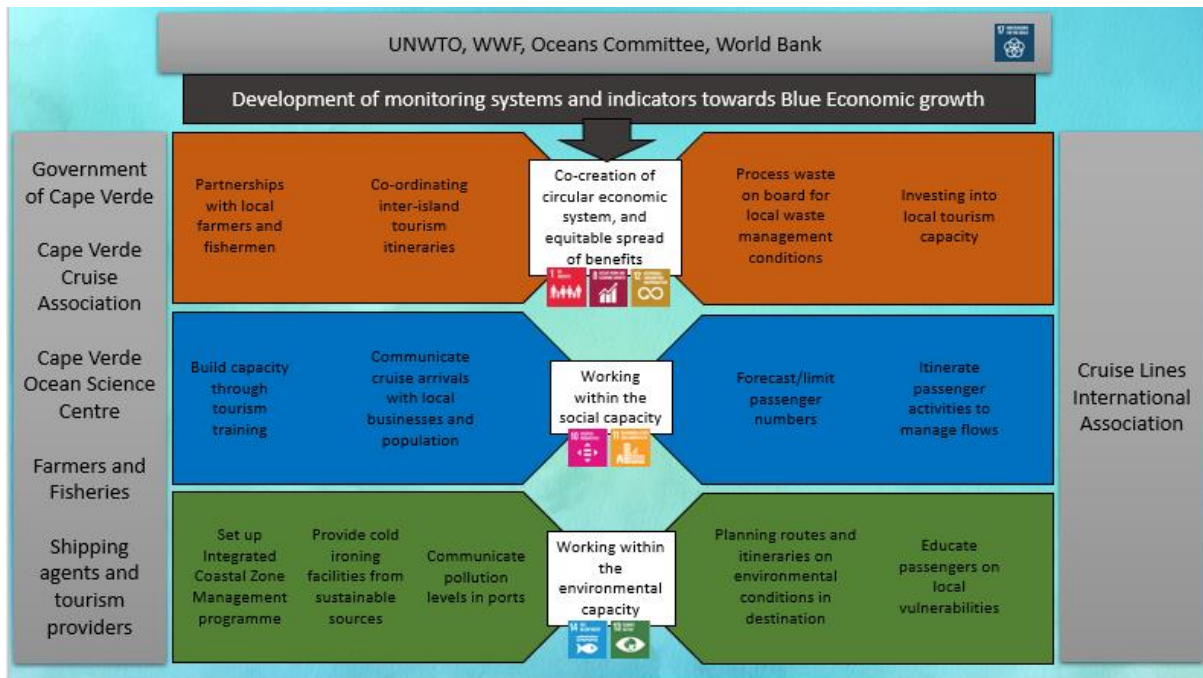


Figure 16 Blue Economy Framework for cruise tourism in Cape Verde

It remains unclear whether or not the cruise industry can be truly sustainable, due to limiting factors such as the industry business model, waste management practices, and impacts on local populations within destinations. If value creation on the people and planet dimension of sustainability becomes part of the industry's *mot être*, then the company will act differently, i.e. sustainably. It is essential of course that this change is not superficial and that sustainability goals are deeply embedded in the organizational goals. (Donella Meadows, Meadows, Randers, & Behrens III, 1972; Doppelt, 2003).

Discussion

In this study, the cruise tourism industry was examined in the context of sustainable tourism and SIDS as a way to assess and specify its potential role in sustainable development. As a result, this study produced a framework for sustainable cruise tourism under Blue Economic strategies and it found multiple opportunities for cruise tourism's contribution towards the SDGs. However, a few methodological limitations need to be discussed to provide nuances in some of the results. These limitations should also be considered for future use of this framework.

Reflection on research approach

Data availability

This study is one of the first to examine how sustainable tourism practices can be expanded to include cruise tourism industry. Consequently, the framework developed considers actions by both the industry and its destination (Cape Verde) within the three dimensions of sustainable development. Furthermore, this framework is designed for measures on the regional level, and while these characteristics result in a comprehensive framework, it has also a downside as it limits the applicability to other SIDS.

At times, the interviewees were sometimes not aware of the certain issues, such as sustainability strategies in Cape Verde. To guarantee the internal validation of this study, other data resources were consulted such as regional reports and/or another closely related indicators were included. This was for instance the case with the Blue Economy, where there was only one reliable report available.

Future research

Inclusion of local population and sustainability experts

Much of the information on Cape Verde's sustainability strategies was gleaned from reports published by the Government of Cape Verde as well as governing bodies such as the UNWTO and UN Platform for Sustainable Development. Deeper insights into the region's plan for addressing sustainability issues in cruise tourism may be revealed by interviewing key players within the government involved in the planning of such strategies.

Furthermore, this study would benefit from including members of the local population who are uninvolved in the tourism industry but susceptible to its impacts. This could highlight previously unknown issues brought to the island by cruise tourism and facilitate the planning of prevention measures. Lastly, it is important to note that the data collected was based on two of the regions most frequented cruise destinations – those which had the capacity to receive medium to large cruise ships and saw the greatest amount of cruise passenger traffic.

It will be of further benefit to assess the cruise industry's perceptions of how sustainable tourism practices can be expanded into the cruise tourism industry.

Expanding geographical scope

The research was based on a case study of Cape Verde, and will benefit from the inclusion of cases of other SIDS to highlight similarities and difference in their approaches towards identifying further sustainable cruise tourism practices. The findings of this report need to be seen as a starting block as it should be further improved by applying it on more case-studies.

Contribution to literature

This study contributes to the existing scientific literature on sustainable tourism and cruise tourism. First of all, it outlines the need for the cruise industry to reassess its design in the face of mounting pressure from destination ports. More, specifically, it highlights the potential of Blue Economic strategies towards the sustainable development of island states such as Cape Verde.

Another important contribution is the inclusion of a framework for collaboration between Cape Verde and the cruise industry towards fulfilling the ambitious targets set by the UN SDGs. By including social, environmental, and economic factors, the framework follows the blueprint of sustainable development and can thus be included in local development strategies, such as those that have already been set by the Government of Cape Verde.

Lastly, this study connects theory with reality as the framework does not solely serve ex-post evaluations of regional sustainable development, it can also help policymakers in designing sustainability strategies. As the framework provides an overview of indicators to take in consideration, it will support policy makers to break-down the concept of sustainable tourism. Overall, this can also be applied to other tourism forms – contributing towards creating a globally sustainable tourism industry.

Conclusion

This thesis aimed to answer the question: 'How can cruise tourism contribute towards Cape Verde's achievement of the 2030 Sustainable Development Goals?' To answer the question, first the history, state, and trends of the global industry were established based on the literature of cruise tourism but also broader literature on sustainable tourism. The second part of this research was to obtain the local context of cruise tourism in Cape Verde by interviewing key stakeholders within the tourism industry on the islands of Santiago and Sao Vicente. Finally, desk research was conducted to ascertain Cape Verde's commitments and attitudes towards sustainable development in order to highlight areas by which cruise tourism may contribute towards this endeavour.

The literature on cruise tourism shows a mostly negative attitude towards the activity – stating that it is environmentally, socially, and economically unsustainable. These are due to the industry's waste management practices, loosely regulated fuel standards, people pollution, and all-inclusive model which captures most of the revenue generated from engaging with local tourism handlers.

Cape Verde has shown to already engage with cruise tourism on a small scale, hosting nearly 200 ships in 2018, and showing signs of increasing activity. However, the bulk of cruise activity is focused on two of the ten islands in the region, and the implementation of a cruise terminal on one of these two is not likely to expand any benefits to the remaining islands. The regions commitment towards sustainable development is remarkable, having achieved nearly all of the MDGs by 2015 and based their future development strategies around the UN SDGs. The country has a set an example to other SIDS and developing countries as a model of commitment to sustainability.

This study has shown that opportunities exist for sustainable tourism practices to be extended into the cruise tourism industry. However, the current model of the industry may impede some of these efforts, and the success of a sustainable transition will depend on cruise industry and cruise destination partnerships, goal setting, and monitoring by third party authorities such as the WWF and UNWTO. It remains to be seen whether or not cruise tourism can achieve social and environmental sustainability with its current business model.

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Appendices

Appendix 1 – Tour timetable for cruise passenger excursions

TIME TABLE AND SPECIAL REMARKS			
Stop/Visit	Duration	Remarks	
Short drive to Marina, visit Cultural center, and start to walk along harbour bay "Rua da Praia"	00.20		
Visit fish market & African market	00.25		
Walk through historical quarter, visit church (if open), stop in front of town hall, visit vegetable market and Lisbon street	00.30		
Drive up to "Monte Verde", photo stop at the viewpoint	00.45		
Scenic drive with photo stops to fisher village called Salamansa and Baia das Gatas	00.50		
Drive back to Mindelo	00.30		
Pass historical square "Praça Nova" and drive back to pier	00.10		
Total time spent...		210 Mins / 3,5 h	
...on bus	155	Toilet facilities	YES
...walking	55	Shopping possibility	YES
...on others (please specify)		Suitable for handicapped	NO
Time for lunch		Accessible for wheelchair	NO
Menue/Lunchbox/Snack included (please specify)		N/A	
Drinks inkluded (please specify)		N/A	
Name of Restaurant		N/A	
Will scheduled points (museum, church, palace etc.) be closed on date of call? (please specify)		NO	
REMARKS			

Appendix 2 – Invoice from Norwegian Star



AGÊNCIA NACIONAL DE VIAGENS - S. A.
SHIPPING AND AIR TRAVEL AGENCY
LLOYD'S AGENCY
IATA NUMERIC CODE: 64-2 0990 2

AGENCIA NACIONAL DE VIAGENS, S.A.

DIVISÃO MARITIMA INTERNACIONAL

AVISO Nr. 375/2018

A Agencia do C/V "NORWEGIAN STAR" da Companhia Norwegian Star Limited, comunica que o mesmo procedente de : **TENERIFE – ESPANHA**, é esperado em **MINDELO** no dia **05/12/2020**, pelas **08:00 horas** e que saíra no mesmo dia, pelas 17:00 horas, pretendendo :

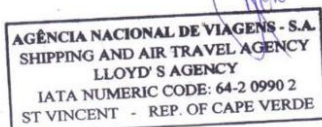
- Visita a bordo:- Logo após a chegada
- Descarga :
- Desembarço:

Nacionalidade : BAHAMAS
Comprimento : 294.13 Mtrs
Calado Max : 8.63 Mtrs
GRT/NRT : 91740 / 61087
Boca : 32.2 Mtrs
IMO : 9195157

OBS: O Navio escala este Porto para turismo pelo que se solicita a sua atracação a chegada.

S. Vicente, 19 de Setembro de 2018

Os Agentes,



S.VICENTE
P.O BOX 142 • PHONE: (238) 232 11 15 / 2321562 / 2313333 • FAX: 232 14 45 . REPÚBLICA DE CABO VERDE
E-mail: anysv@cvtelecom.cv
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200477625

NIF: