

APRIL 2021

PUBLIC POLICY ON **TOURISM** **INFRASTRUCTURE**

Promoting efficient coordination for
the development of strategic tourism
infrastructure in Colombia.

MINISTRY OF TRADE, INDUSTRY, AND TOURISM



El progreso
es de todos

Mincomercio

Cartagena de Indias.

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1. Presentation

As assessed in the World Economic Forum’s (WEF) Travel and Tourism Competitiveness Index 2019 (TTCI), it is clear that Colombia’s tourism offer is growing—given its natural and cultural wealth—and is tackling significant challenges in infrastructure trends, competitiveness, and tourism sustainability.

For this reason, in an effort to enhance tourism and design guidelines to develop and promote Colombia’s strategic tourism infrastructure, the Ministry of Trade, Industry, and Tourism led the formulation of the Public Policy on Tourism Infrastructure while considering the current dynamics. The various institutions involved in this economic sector also participated in this effort.

This document is the result of the joint work carried out by the Vice Ministry of Tourism and the specialist committee, made up of the Department of National Planning (DNP), the National Infrastructure Agency (ANI, as per its Spanish acronym), National Parks (PNN, as per its Spanish acronym), the Colombian Hotel and Tourism Association (COTELCO), the Colombian Association of the Gastronomy Industry (ACRODRES), the Universidad Externado de Colombia, ProColombia, and the Tourism Promotion Fund (FONTUR). It is in line with the Ministry of Trade, Industry, and Tourism’s quality management procedure for “policy design, formulation, and implementation.”

The Policy on Tourism Infrastructure addresses the provisions of the 2018-2022 National Development Plan *Pacto por Colombia*, *Pacto por la Equidad* (*Pact for Colombia*, *Pact for Equity*), and the 2018-2022 Tourism Sector Plan, *Turismo*, *el propósito que nos une*

(*Tourism, the Purpose that Unites Us*). In its third strategic line called “*More investment, better infrastructure, and connectivity for tourism*,” the latter proposes the goal to:

“**Create management tools and public-private interinstitutional coordination to manage the tourism sector’s requirements and needs to further develop Colombia’s tourism infrastructure; boost foreign and domestic investment in developing world-class tourism services and facilities; as well as optimize the comprehensive connectivity associated with this sector in the various destinations” (MinCIT, 2018).**

In order to achieve this goal, the Vice Ministry of Tourism proposed six strategies in the Tourism Sector Plan: i) attract investment for sustainable, world-class tourism infrastructure and facilities, ii) increase foreign direct investment in tourism, iii) boost public-private investment in tourism infrastructure, iv) expand and improve air connectivity, v) improve land, river, maritime, nautical, and digital connectivity, and vi) enhance sustainable infrastructure for tourism.

These strategies are addressed in this policy, which aims to strengthen the project processes of formulation, planning, management, and monitoring aimed at the sustainable development of tourism infrastructure while supporting efficient coordination with other institutions that promote strategic infrastructure in Colombia through six strategies: i) technical capacity, ii) strategic planning, iii) financing and investment, iv) governance, v) innovation, and vi) sustainable tourism infrastructure.

2. Context

The following are some references that have made it possible to determine the path towards the promotion and consolidation of Colombia’s strategic tourism infrastructure.

2.1 Standards

In 1968, through Decree 2700,¹ the National Tourism Corporation of Colombia (CNT, as per its Spanish acronym) was created to prepare tourism development programs; study infrastructure needs for tourism purposes; promote and grant loans for tourism development; promote the creation of establishments for economic tourism; create, maintain, subsidize, and oversee schools to train technicians and qualified personnel in tourism-related activities; encourage and promote economic consortiums for the promotion of Colombian tourism; and administer the funds allocated in the national budget for hotels, lodging, spas, parks, or similar regional works for the promotion and development of tourism. Additionally, the function of building tourism points of interest in places where the private sector had not done so was also granted. Among the ten functions established for the CNT, four correspond to tourism infrastructure, as a clear commitment to its development in Colombia.²

Similarly, Law 60 of 1968 established incentives for the tourism industry through “tourism development certificates” granted to investors by the CNT (Article 7)³ for new hotels or hostels that decided to expand or substantially improve existing facilities (Article 8).⁴ Furthermore, the aforementioned law determined that “the investment of funds allocated in the national budget for hotels, lodging, spas, parks, and similar regional works for the promotion and development of tourism will be administered by the National Tourism Corporation of Colombia” (Article 17).⁵

Subsequently, Article 40 of Law 300 of 1996—which enacted the General Law of Tourism, as amended by Article 1 of Law 1101 of 2006—created the parafiscal contribution aimed at promoting tourism and defined the intended contributors.

Once the parafiscal contribution was created, Article 42 of the same law—as amended by Article 40 of Law 1450 of 2011—created the Tourism Promotion Fund “as an instrument to manage resources from the parafiscal contribution referred to in Article 40 of this law, which shall adhere to the guidelines of the tourism policy defined by the Ministry of Trade, Industry, and Tourism. For all purposes, the contracting processes carried out by the Administrative Entity of the Tourism Promotion Fund shall be carried out in accordance with private law” (Law 1450, Art 42, 2011).

Article 43 of Law 300 of 1996, as amended by Article 10 of Law 1101 of 2006, established that the Tourism Promotion Fund’s resources “will be used to implement projects related to competitiveness, promotion, and marketing in order to increase domestic and inbound tourism, in accordance with the tourism policy—submitted to the Tourism Promotion Fund’s Steering Committee by the Ministry of Trade, Industry, and Tourism—which shall take into account the projects previously included in the project bank created in this law” (Law 1101, Art 10, 2006).

Law 1101 of 2006 created the tourism tax as a social investment by way of promoting and reinforcing competitiveness, including tourism quality and training. In accordance with the provisions of the aforementioned law, resources stemming from the tourism tax must be used for promotion and competitiveness in order to encourage recreation and the adequate use of free time, in accordance with the provisions of Article 52 of the Political Constitution.

Subsequently, with the entry into force of Law 1558 of 2021,⁶ the name of the Tourism Promotion Fund was changed to the National Tourism Fund (FONTUR, as per its Spanish acronym), establishing it as a trust asset with legal personality and with the main function of collecting, administering, and using the resources allocated in the national budget for tourism infrastructure, promotion, and competitiveness, as well as resources from the tourism tax, the parafiscal contribution for tourism promotion, and the Tourism Promotion Fund.

Article 19⁷ of Law 1558 established the “procedure for accessing the resources of the National Tourism Investment Program.” This procedure defined that local and regional authorities wishing to submit tourism infrastructure projects for consideration must register them “in the bank of tourism infrastructure projects no later than June 30 each year.” However, this article was repealed by Decree 2106 of 2019⁸; the handbook for resource allocation and project presentation enabled the National Tourism Fund (FONTUR) to receive proposals for tourism infrastructure initiatives throughout the year with no deadlines.

Moreover, in order to create tax benefits for this activity, Decree 2755 of 2003 regulated the exempt income for hotel services rendered in new hotels whose construction began on or after January 1, 2003, for a term of 30 years starting from the taxable year. Subsequently, Decree 920 of 2009 was issued, which amended Decree 2755 of 2003, limiting this benefit only for hotels built between January 2003 and December 2017. Finally, Decree 463 of 2016 defined the tax benefit for new hotels whose construction began before December 31, 2017, and this only applied to those hotels that were completed or at least 61% completed between January 2003 and December 2017.

Subsequently, with the entry into force of Law 2010 of 2019,⁹ the tourism sector benefited from a preferential income tax rate (9%) for new and remodeled hotels, theme parks, agritourism, ecotourism, and docks.

Then, Decree 1155¹⁰ of 2020 regulated Article 264 of Law 1955 of 2019, regarding infrastructure for special tourism projects (PTE, as per its Spanish acronym), which aims to position tourism as a promoter of national economic growth. These projects, which will have master plans for their design, planning, and implementation, aim to encourage the development of large-scale tourism projects in Colombia that—taking into account their geographic location, cultural and/or environmental and/or social values, as well as the feasibility of connectivity—can become highly strategic projects for developing and improving the potential for tourism in the places where they are developed. They will also provide incentives for public and private investment in Colombia’s tourism infrastructure.

Finally, Law 2068 of 2020,¹¹ which amends the General Law of Tourism, established the promotion of sustainability through mechanisms to conserve, protect, and utilize tourist destinations and attractions, also addressing the pillars related to formalization and quality improvement in a timely manner. This law establishes maximum use limits¹², which defines various factors, including tourism infrastructure and facilities with the capacity to sustainably support the maximum number of visitors.

This law also takes into account the handling of contingencies associated with disaster situations or the declaration of a state of emergency at the national, departmental, district, or municipal level, the use or allocation of resources from the national tourism tax to repair tourism service providers’ infrastructure, such as tourist housing and accommodation.¹³ Specifically, in order to support the promotion and strengthening of the Archipelago Department of San Andrés, Providencia, and Santa Catalina, the law established that each national tourism tax collected as a social investment will be distributed in the following way: the National Tourism Fund will direct USD 0.50 to the Archipelago Department of San Andrés, Providencia, and Santa Catalina, and USD 0.50 to the municipality of Providencia and Santa Catalina Islands for infrastructure, promotion, and efforts to increase competitiveness.¹⁴

2.2 Tourism Sector Plan

The Tourism Sector Plans are the instrument through which the strategies aimed at establishing tourism as one of Colombia’s main economic sectors have been drawn up. Over the last decade, the Tourism Sector Plans for tourism infrastructure have focused on the following strategies that have contributed to their consolidation in Colombia.

The Tourism Sector Plan, *Turismo: factor de prosperidad 2011-2014* (Tourism: Prosperity Factor), refers to the proposals in the 2010-2014 National Development Plan *Prosperidad para todos*. (Prosperity for All). In relation to infrastructure, it included a strategic guideline called “Improving the management of infrastructure support and connectivity for tourism,” which included six strategies, with their respective programs and projects. These mainly focused on financing tourism infrastructure and emphasized that it was necessary to “continue with the efforts made by the national government in terms of incentives for construction, remodeling, and expansion” (MinCIT, 2011 p. 11) by businesses in the sector. The aforementioned was established in order to climb the World Economic Forum’s (WEF) ranking of countries with respect to their competitiveness in tourism.

Similarly, this sector plan established the possibility for local and regional authorities to enter into contracts with the entity administering the Tourism Promotion Fund to co-finance tourism infrastructure projects and indicated the importance of seeking funding for this type of project with agencies such as the National Parks Special Administrative Unit and the Ministry of Culture. It is worth noting that this strategy approached infrastructure from a broad perspective, which included actions related to infrastructure on beaches, tourist lodging, and also referred to the competitiveness of airports, information technology programs, communication for tourism marketing and operation, the air integration program, and travel warnings for Colombia (MinCIT, 2011 p. 11).

In 2014, the new 2014-2018 Tourism Sector Plan, *Turismo para la construcción de la paz* (Tourism for peacebuilding) established four strategic objectives, including infrastructure issues in the first strategy, called “Competitiveness for Regional and National Tourism Development,” and in the second, called “Competitive Connectivity.” The first strategy was implemented through the “Infrastructure for Tourism” program, which emphasized the importance of sustainable and accessible infrastructure that responded to the regions’ needs. There, support infrastructure for tourism was mentioned, but not defined as an element that supports tourism development in the regions (MinCIT, 2014 p. 44).

This plan also proposed actions in the area of tourism signage and the reestablishment of the Tourist Lodging Program (*Programa de Posadas Turísticas*), which was aimed at populations in rural areas with high tourism value and sought to improve these communities’ quality of life by improving housing infrastructure and developing sustainable community tourism.

As such, the goal was to create conditions to accommodate tourists in residents’ homes in destinations with special tourist niches and attractions, mainly in regions that did not have developed tourist lodging facilities. The plan also established the need for relevance criteria for projects financed by royalties with general tourism components.

Furthermore, the second guideline of the 2014-2018 Tourism Sector Plan had the strategic objective to “boost competitive connectivity for Colombia’s tourism at the regional, national, and international levels” (MinCIT, 2014 p. 32). It mentions the ground, air, maritime, and river transportation needs for infrastructure in order to improve the factors prioritized in Colombia’s tourism development, including highways for tourism, airport infrastructure quality, and piers or docks available for large and small vessels. Its implementation was outlined in the air, land, maritime, and river connectivity studies and included promoting improved services in air, land, maritime, and river terminals, as well as aspects related to cruise ships (promotion of routes and frequencies).

The current 2018-2022 Tourism Sector Plan, *Tourism, the purpose that unites us*, addresses challenges in terms of attracting investment. According to the World Economic Forum (WEF), the tax burden, excessive paperwork, and expensive materials are some of the bottlenecks faced by businesses when they decide to undertake infrastructure and tourism projects in Colombia.¹⁵ Consequently, in the current Tourism Sector Plan, as shown in Graph 1, six strategies were proposed that aim to strengthen the institutional framework for tourism and the management of its resources as tools to improve coordination, cooperation, responsibility, governance, and sustainability at the national and regional levels (MinCIT, 2018).



Guatapé, Antioquia. Photo: Unsplash, Robin Noguier.

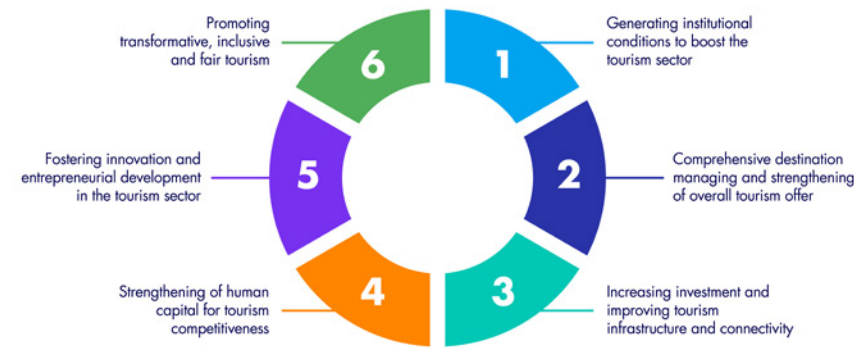


Figure 1. Strategic lines of the 2018-2022 Tourism Sector Plan: Tourism, the purpose that unites us. Source: MinCIT, 2018.

Strategic line 3 states that the national government should design infrastructure and connectivity projects with a comprehensive approach that consider the tourism sector's needs and that are coordinated with the local and regional authorities' tourism planning processes in order to meet the needs of each destination according to its focus.

It also emphasizes the need to increase foreign direct investment for tourism in Colombia, diversify financing sources for building infrastructure in the sector, provide financial support for the required pre-feasibility and feasibility studies, promote the development of tourism infrastructure and support for the activity in a sustainable way, increase the infrastructure required to promote high-value tourism, as well as develop mega-projects through the creation of specific incentives.

In addition, it establishes the importance of improving regional airports' capacity and infrastructure in strategic tourist destinations—along with the competent authorities—promoting the creation of new hubs or centers for international flight connections and distribution¹⁶ in airports other than Bogota, as well as promoting investments in hub airports to develop airport infrastructure that facilitates low-cost operation, improves access, enhances the regions' tourism

potential, and develops their infrastructure to handle a minimum of class C aircraft.

It is also important to strengthen inter-institutional management in order to continue improving roads, highways, paths, trails, and transportation infrastructure for tourism (airports, airfields, ground transportation terminals, and river, maritime, and nautical infrastructure, among others), as well as develop navigability and river transportation for tourism activities in prioritized destinations. There is also the need to work with the competent authorities at the national and regional levels to implement the strategies of the National Plan for Nautical Tourism in Colombia, particularly those referring to the organization of facilities and activities around a National Network of Nautical Bases.

The strategic line also indicates that the implementation of the Private Participation Support Program (PAPP, as per its Spanish acronym) in Colombia is a significant step towards connecting the country through infrastructure such as roads and highways.

The development of public-private partnership (PPP) projects in the tourism sector should also include improving infrastructure and tourist facilities, including hotels, convention centers, and theme parks.

With regard to infrastructure, the cluster analysis¹⁷ identifies what it calls “urban infrastructure” such as plazas, parks, signage, parking lots, and security and surveillance services. It then gives a brief description of the status of urban infrastructure per cluster and mentions tourism infrastructure initiatives for each of them. Under the heading “general cluster infrastructure,” the study analyzes the quality of the road and transportation system and, where applicable, describes area connectivity and airport capacity.

In the chapter “Strategies related to sector structure” (Volume III – Chapter I), the study devotes a section to the “Strategy to improve reception and mobilization” based on the interventions it considers necessary in terms of road suitability and route facilities (lodging, service stations), airport suitability and services, and the construction of marinas, docks, and sports marinas. It also refers to tourist road transportation and the importance of its improvement for Colombia. This study takes a broader view of infrastructure in its different components, including air and road connectivity, as relevant elements for sector competitiveness.

Furthermore, the book “30 Years of Colombian Tourism” (CNT, 1998) mentions the restorations¹⁸ carried out by the CNT, as well as the corporation's assets¹⁹ at the time of its liquidation. This book gives an account of the importance and the resources that CNT invested in what they called “tourist facilities.”

Thus, by recapping the different approaches to infrastructure, the following categories can be established based on what has been considered relevant for developing tourism activity: tourist facilities (resorts, sports fields, hotels, hostels); connectivity infrastructure (air and road, transportation services); and cultural heritage.²⁰

Finally, according to the technical document prepared by the Ministry of Economic Development (2000), the sector's vision for 2020 was: “By 2020, Colombia will have positioned tourism as one of the most important activities for the country's economic development. Consequently, it will be a country that will have strengthened the competitiveness of its products and destinations by working in a way that will allow a harmonious nation-region relationship, where the national and local public sectors will play a decisive role in creating optimal conditions for business performance.”

The vision for 2020 defined the main pillars for consolidating the sector, namely: the definition of basic products that will include Colombia as a tourism destination on a national level; regional specialization in differentiated offers, with improvement programs based on the competitiveness of the tourism product; attraction of high-income tourists; joint work between the public and private sectors and identification of the different tourism service providers as part of a tourism value chain; product and destination competitiveness; the quality of the product and what sets it apart; high-quality human resources linked to the sector; consolidation of a tourism culture in society; and technological research and development in tourism.



2.4 Presentation and financing of projects in the tourism sector

Article 42 of Law 300 of 1996 created the Tourism Promotion Fund as an instrument to manage resources from the Parafiscal Contribution for the Promotion of Tourism. Subsequently, with the entry into force of Law 1558 of 2012, the name of the Tourism Promotion Fund changed to the National Tourism Fund (FONTUR), and its constitution as a trust asset was ordered. Therefore, its administration and spokespersonship was assumed by the company Fiduciaria Colombiana de Comercio Exterior S.A. – FIDUCOLDEX S.A., for which Mercantile Trust Agreement No. 137 of 2013 was signed between the Ministry of Trade, Industry, and Tourism and the aforementioned trust company, which assumed the administration and spokespersonship of the fund as of September 1, 2013.²¹

The National Tourism Fund's (FONTUR) handbook for resource allocation and project presentation, updated February 2020, defines the general provisions for allocating resources through the presentation of projects and establishes the guidelines for their financing. In this sense, the following 6 strategic lines for resource allocation have been defined:

1. **Improvement of tourism competitiveness**
2. **Tourism infrastructure**
3. **Enhancing tourism promotion and marketing**
4. **Responsible tourism**
5. **Project bank**
6. **Administration and sale of FONTUR's assets**

Line 2, tourism infrastructure, proposes three programs for allocating investment through FONTUR: i) pre-feasibility and

feasibility studies for tourism infrastructure projects, which may only be submitted by the Ministry of Trade, Industry, and Tourism as the sole proponent, ii) tourism infrastructure studies and designs, and iii) implementation of tourism infrastructure projects. The latter two may also be submitted by local and regional authorities, complying with the conditions established in the handbook.

The handbook for resource allocation and presentation of FONTUR projects, in force since February 1, 2020, modified the deadline for presenting infrastructure projects, allowing local and regional authorities to present initiatives until December 31 of each fiscal year. Likewise, and for all strategic lines, projects must be submitted to FONTUR and not to the Vice Ministry of Tourism. Finally, as a complementary document to the handbook, an annex was included with the requirements that local and regional authorities must comply with when presenting infrastructure projects.

On April 20, 2020, the handbook for resource allocation and presentation of FONTUR projects was again modified, creating strategic line 7: “Support to the tourism sector value chain in emergency situations,” with the purpose of assisting the sector in the face of the economic emergency derived from the global COVID-19 pandemic. For this handbook, the Ministry of Trade, Industry, and Tourism established Memorandum 017 of 2020, which defined the roles and procedures for processing projects to be supported with FONTUR resources, in accordance with the provisions of Law 1558 of 2012. This handbook did not modify the content of the tourism infrastructure strategic line.

2.5 Sustainable Development Goals

The United Nations established the 2030 Agenda for Sustainable Development as “an opportunity for countries and their societies to embark on a new path to improve the lives of all, leaving no one behind” (United Nations, 2015). This agenda is made up of 17 sustainable development goals (SDGs) that address everything from ending poverty to combating climate change, responsible production and consumption, advancing education, gender equality, environmental protection, the design of our cities and industries, and innovation and infrastructure.

This tourism infrastructure policy is intended to correspond with some of the 2030 vision goals; however, according to the needs that were identified, a clear connection with the following SDGs can be easily identified:



GOAL 9: Industry, innovation, and infrastructure

“Investment in infrastructure and innovation are crucial drivers of economic growth and development. With over half the world population living in cities, mass transportation and renewable energy are becoming increasingly important, as are the growth of new industries and information and communication technologies” (United Nations, 2015).



GOAL 11: Sustainable cities and communities

“More than half of the world population now lives in cities. By 2050, that figure will have risen to 6.5 billion people, two-thirds of all humanity. Sustainable development cannot be achieved without radically transforming the way we build and manage urban spaces.

The rapid growth of cities in the developing world—as a result of rising populations and increased migration—has led to a boom in megacities, especially in the developing world, and slums are becoming a more significant feature of urban life” (United Nations, 2015).



GOAL 13: Climate Action

“There is no country that is not experiencing the drastic effects of climate change. Greenhouse gas emissions continue to increase and are more than 50% higher than in 1990. Global warming is causing long-lasting changes to our climate system, which threatens irreversible consequences if we do not act.

The average annual losses from climate-related disasters alone reach hundreds of billions of dollars. This is not to mention the human impact of geo-physical disasters, which are 91 percent climate-related, and which between 1998 and 2017 killed 1.3 million people and left 4.4 billion injured. The goal aims to mobilize USD 100 billion annually by 2020 in order to address the needs of developing countries to both adapt to climate change and invest in low-carbon development.

Supporting the most vulnerable regions will directly contribute not only to Goal 13, but also to other Sustainable Development Goals. These actions must go hand in hand with efforts to integrate disaster risk reduction measures into national policies and strategies. With political will and a wide range of technological measures, it is still possible to limit the increase in the global mean temperature to two degrees Celsius above pre-industrial levels, aiming at 1.5°C, but this requires urgent collective action.

Making cities safe and sustainable means ensuring access to safe and affordable housing, and upgrading slum settlements. It also involves investing in public transport, creating green public spaces, and improving urban planning and management in a way that is both participatory and inclusive” (United Nations, 2015).



Photo: Unsplash.



GOAL 14: Life Below Water

“The oceans drive global systems that make the Earth habitable for humankind. Our rainwater, drinking water, weather, climate, coastlines, much of our food, and even the oxygen in the air we breathe, are all ultimately provided and regulated by the sea.

Careful management of this essential global resource is a key feature of a sustainable future. However, at the current time, there is a continuous deterioration of coastal waters owing to pollution, and ocean acidification is having an adversarial effect on the functioning of ecosystems and biodiversity. This is also negatively impacting small scale fisheries.”

White-necked Jacobin, *Florisuga mellivora*.

2.6 Conservation of the environment and renewable natural resources

Article 5, paragraph 822 of Law 99 of 1993 establishes that the Ministry of Environment is responsible for “evaluating the scope and economic effects of environmental factors, their incorporation into the market value of goods and services, and their impact on the development of the national economy and its external sector; its cost in medium and large infrastructure projects, as well as the economic cost of the deterioration and conservation of the environment and renewable natural resources; and conducting research, analysis, and economic and fiscal studies in relation to the budgetary and financial resources of the environmental management sector and related taxes, fees, contributions, duties, fines, and incentives.”

Article 14²³ of the same law establishes that the National Environmental Council is responsible for “formulating the recommendations it deems necessary to adapt the use of the territory and the plans, programs, and projects to build or expand public infrastructure in an appropriate and sustainable way while considering Colombia’s environment and natural heritage.” Article 31²⁴ determined that the functions of the Regional Autonomous Corporations include “coordinating with the local and regional authorities to execute, manage, operate, and maintain projects, sustainable development programs, and infrastructure whose implementation is necessary to defend, protect, decontaminate, or restore the environment and renewable natural resources.”

Decree 1076 of 2015²⁵ sets out the national goals for nature conservation, for the conservation of Colombia, in coordination with management processes, sector plans, ecosystem management plans, and other additional determinants issued by the corresponding environmental authorities²⁶ for the development of tourism infrastructure initiatives in Colombia. Article 2.2.2.2.5.1²⁷ establishes the **list of improvement activities in transportation infrastructure projects** in the following categories:

- a. Ground – highways
- b. Ground – railways
- c. Aquatic – river and aquatic modes of port infrastructure
- d. Air



2.7 COVID-19 Situation

Since the economic, social, and ecological emergency was declared throughout Colombia on March 17, 2020 due to the COVID-19 pandemic, tourism activities have been strongly affected due to the restrictions on mobility and entry into the country implemented to mitigate the spread of the virus.

According to figures reported by Aerocivil (Colombian Civil Aviation Authority), as a consequence of the air travel restriction measures and the closure of airports in Colombia, a reduction in air passenger transportation began in March, decreasing by 47.6% for international traffic and 37.11% for domestic traffic. In the months of April, May, and June, these measures remained in force, and the air passenger traffic recorded by the Colombian Civil Aviation Authority during these months was zero (0). A similar situation was recorded throughout July and August, time during which the restriction was maintained.

Similarly, due to the mitigation measures restricting mobility and entry to Colombia, the number of visitors during the month of March was 213,166, representing a 47.5% decrease compared to the same month in 2019. This drop reached a historic level in April, recording the arrival of 578 non-resident visitors, or 99.8% fewer compared to April 2019. The proportionality of the drop remained throughout the next four months of 2020, with the arrival of 1,346 (May), 3,029 (June) 3,134 (July) and 3,339 (August) non-resident visitors, respectively representing 99.6%, 99.1%, 99.2%, and 99.1% fewer than those recorded in the same month in 2019. For the month of September, entry increased with the registration of 11,426 non-resident visitors, representing a drop of 96.3%.²⁸ The reduction in the number of non-resident visitors to Colombia, which directly results

in an income reduction, not only jeopardizes the survival of companies in the sector, but also represents a high probability of massive job losses. Data from the National Department of Statistics' Integrated Household Survey shows that in August 2020, tourism-related activities (accommodation and food services) had three hundred fifty-six thousand (356,000) fewer employees than in August 2019, representing a reduction of 22.5%.

This leads to a significant decrease in the collection of stamp taxes, which directly affects the development of tourism infrastructure projects through the National Tourism Fund. Therefore, it is important to increase foreign direct investment for tourism in Colombia and diversify the sources of financing for construction projects in the sector.

In line with the UNWTO Secretary General's statement, the situation caused by the COVID-19 pandemic also represents an opportunity for the sector to transform itself, integrating sustainability into local, national, and international tourism strategies and policies. This situation demonstrated that the decrease in tourists positively affected natural resources while also showing that the paralyzed tourism sector puts millions of jobs at risk. With the Sustainable Tourism Policy, the Ministry of Trade, Industry, and Tourism (MinCIT, as per its Spanish acronym) recognizes both situations in its reactivation efforts and aims to lay the foundations for tourism to once again establish itself as an essential part of the Colombian economy and become part of the broader sustainable development agenda.

3. Conceptual Framework

Tourism is an activity that stands out for its economic performance. This activity has been growing faster than global merchandise exports for over seven consecutive years.²⁹ In 2019, the World Tourism Organization (UNWTO) recorded the arrival of 1.5 billion international tourists worldwide, a 4% increase compared to the previous year. The UNWTO predicted that this figure would be similar for the year 2020, estimating an increase of between 3% and 4% (World Tourism Organization, Madrid, January 2020).

The performance of the tourism sector was similar in Colombia:



Figure 2. Behavior of the tourism sector in Colombia – 2019. Source: MinCIT, 2019.

The growth of this industry is the result of several factors, including the government's commitment to establish high-value tourism products or segments, which tend to be sustainable, responsible, and of high quality.

3.1 World Economic Forum's Travel and Tourism Competitiveness Index

With the objective to measure the factors and policies that enable the tourism sector's competitive development and create comparable measurements between different countries, in 2007, the WEF published the Travel and Tourism Competitiveness Index (TTCI) for the first time.

This index evaluated 124 countries based on 13 pillars organized into 3 sub-indices or categories of related pillars: i) travel and tourism regulatory framework; ii) business environment and infrastructure; iii) human, cultural, and natural resources.

The TTCI pillars were:

- Policy rules and regulations
- Environmental regulation
- Safety and security
- Health and hygiene
- Prioritization of travel and tourism
- Air transport infrastructure
- Ground transport infrastructure
- Tourism infrastructure
- Information and Communications Technology Infrastructure (ICTI)
- Price competitiveness in the travel and tourism industry (T&T)
- Human resources
- National perception of tourism
- Natural and cultural resources

In 2015, a significant methodological change was made to the TTCI with the creation of a new sub-index, called infrastructure. This sub-index was built from the pillars measuring tourism infrastructure that were previously part of the “Business Environment and Infrastructure” sub-index. Thus, as evidenced in Figure 3, in the 2015, 2017, and 2019 measurements, the TTCI was made up of 4 sub-indices and 14 pillars. The main consequence of this methodological change in 2015 is the loss of comparability between the 2015, 2017, and 2019 indices with results prior to 2015.

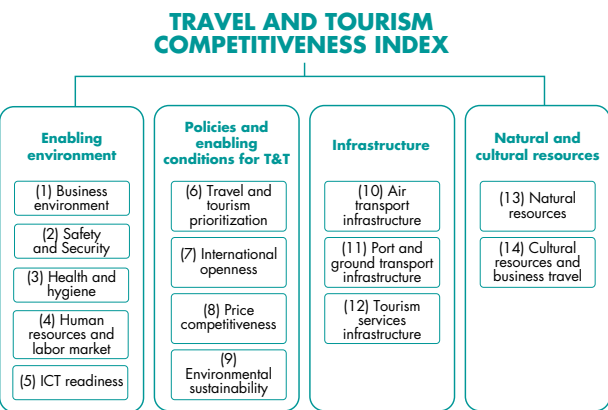


Figure 3. TTCI: Subindices and pillars. Source: WEF.

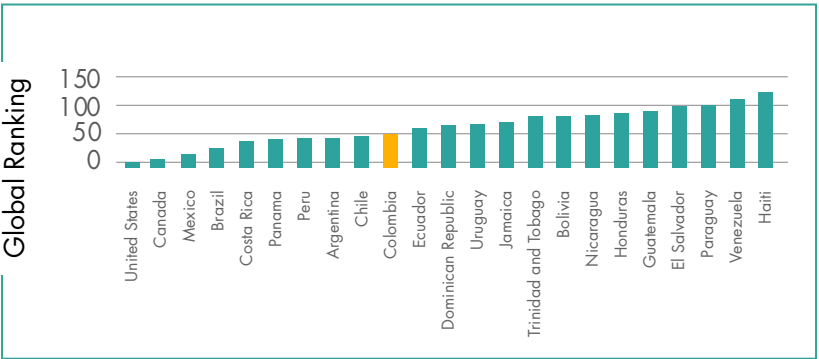


Figure 4. TTCI 2019 Ranking – The Americas.

Source: Prepared by MinCIT with information from the 2019 WEF.

Between 2015 and 2017, Colombia rose 6 places globally, moving from 68th to 62nd place in the TTCI, outperforming 54.4% of the countries included in the measurement. The improvement in the “infrastructure” sub-index is noteworthy, in which Colombia moved from 95th to 86th place. Between 2017 and 2019, Colombia moved up 7 places in the TTCI measurement, ranking 55th out of 140 countries; 10th in the Americas, and 5th in South America. It is important to clarify that 136 countries were measured in the 2017 TTCI ranking, while 140 countries were measured in 2019.

In terms of the infrastructure sub-index, Colombia ranked 85th, moving up one position compared to the 2017 measurement. One of the areas in which Colombia must make improvements is in infrastructure, in its three components: i) air transport infrastructure;³⁰ ii) ground and port infrastructure;³¹ and iii) tourism services infrastructure.³² In these components, Colombia ranks 65th, 109th, and 82nd, respectively.

Sub-Index	Pillar	Colombia Ranking 2019 55/140 countries	Colombia Ranking 2017 62/136 countries	Difference in position
Enabling environment	Business environment	124	111	-13
	Security	133	136	3
	Health and hygiene	77	86	9
	Human resources and labor market	71	66	-5
	ICT readiness	73	69	-4
Policies and enabling conditions for T&T	Travel and tourism prioritization	103	97	-6
	International openness	5	4	-1
	Price competitiveness	29	103	74
	Environmental sustainability	52	62	10
Infrastructure	Air transport infrastructure	65	60	5
	Ground and port infrastructure	109	116	7
	Tourism services infrastructure	82	82	0
Natural and cultural Resources	Natural resources	19	22	3
	Cultural resources and business travel	25	20	-5

Table 1. Colombia's performance in the travel and tourism competitiveness index: 2017 and 2019 Rankings.

Source: Prepared by MinCIT with information from the 2017-2019 WEF.

If Colombia is compared with the average scores for the Americas, in terms of airport infrastructure, Colombia is average. However, in terms of the other two pillars, road and port infrastructure, Colombia is below average, demonstrating the effort that must be made to focus on these pillars in particular, in order to improve Colombia's comparative advantages as shown in the following figure.

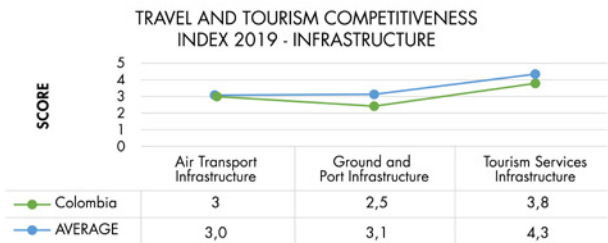


Figure 5. Score comparison: Colombia vs. Americas average

Source: Prepared by MinCIT with information from the 2019 WEF.

However, if we assess the indicators considered in the measurement of each pillar, the overall result is as follows:

a) Air transport infrastructure (Rank 65/140 – Rating 3.0/7.0). The following indicators are assessed in this pillar:

INDICATOR	POSITION #
Quality of air transport infrastructure	76
Available seat kilometers, domestic	24
Available seat kilometers, international	46
Aircraft departures	44
Airport density	46
NUMBER of operating airlines	62

Table 2. Air transport infrastructure.

Source: Prepared by MinCIT with information from the 2019 WEF.

b) Ground and port infrastructure (Rank 109/140 – Rating 2.5/7.0). The following indicators are assessed in this pillar:

INDICATOR	POSITION #
Road quality	102
Road density	86
Paved road density	n/a
Quality of railroad infrastructure	99
Railroad density	90
Quality of port infrastructure	74
Ground transport efficiency	113

Table 3. Ground and port infrastructure.

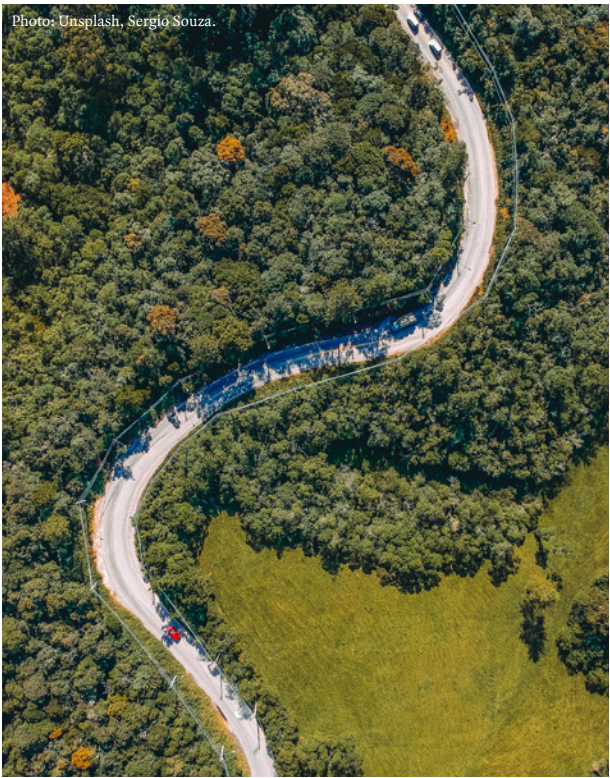
Source: Prepared by MinCIT with information from the 2019 WEF.

c) Tourism services infrastructure (Rank 82/140 – Rating 3.8/7.0). The following indicators are assessed in this pillar:

INDICATOR	POSITION #
Hotel rooms	70
Quality of tourism infrastructure	90
Presence of major car rental companies	70
ATMs per adult population	76

Table 4. Tourism services infrastructure.

Source: Prepared by MinCIT with information from the 2019 WEF.



It is clear that the indicators in the lowest positions in relation to the other indicators for the same pillar are the quality of air transport infrastructure, quality of ground infrastructure, and quality of tourism infrastructure. Based on the above, Colombia must continue directing its efforts towards increasing actions that will improve its position in these indicators in future TTCI measurements.

Furthermore, it is important to specify that some of the indicators considered are outside the lines of the Vice Ministry of Tourism's resource allocation for tourism, implemented by FONTUR's autonomous trust fund, and in some cases are the responsibility of other portfolios. This leads us to consider the importance of coordinated inter-institutional work contributing to improving evaluation indicators such as ground transport efficiency, road quality, and railroad infrastructure quality, among others.

According to the analysis, the national, regional, and local authorities involved in the construction of infrastructure taken into account in the measurement of this index are as follows:

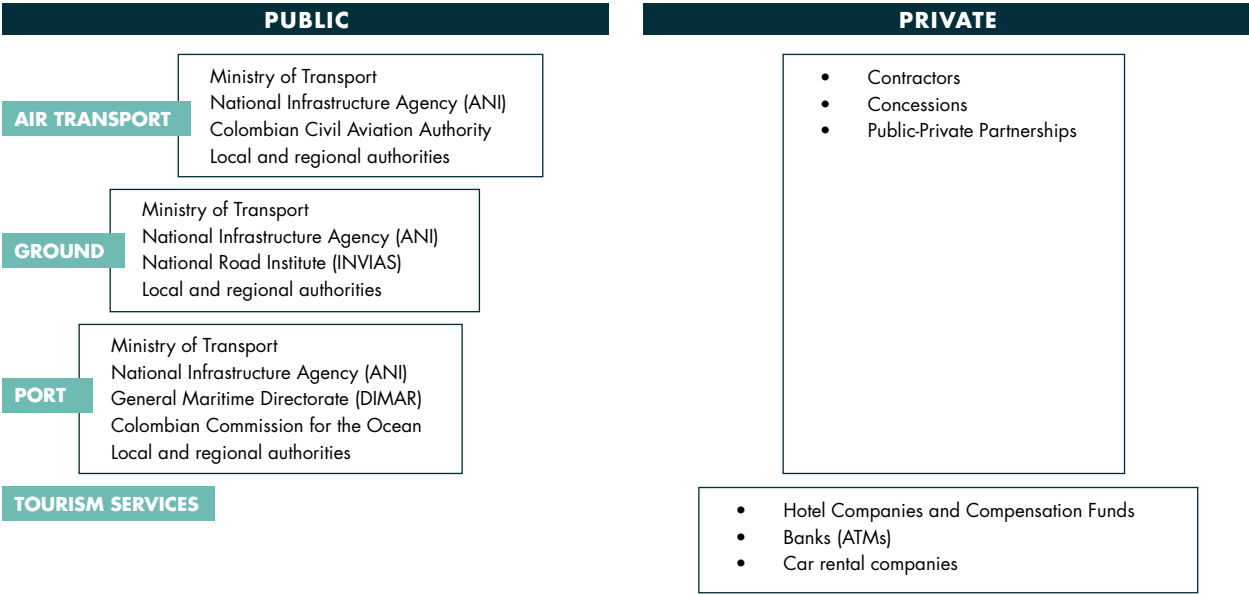


Figure 6. Stakeholders involved in the construction of infrastructure in Colombia considered in the TTCI measurement.
Source: Prepared by MinCIT.

Given the behavior of Colombia’s infrastructure indicators in the TTCI, there are enormous challenges to tackle regarding inter-institutional coordination and governance, also identified through the Pact for Decentralization within the 2018-2022 National Development Plan Pact for Colombia.³³ In fact, responsibility for the elements measuring these indicators lies with various stakeholders at different levels in the public sector, as well as in the private sector.

The United Nations identified infrastructure gaps through the Economic Commission for Latin America and the Caribbean, systematizing challenges that require sustained development such as:

- “High dispersion and multiplicity of public visions regarding infrastructure and services, and the consequent lack of comprehensiveness in the approach to policies in their different processes (conception, design, implementation and follow-up, monitoring and evaluation).
- Institutional and regulatory failures or obstacles in both policy conduct and market organization” (Economic Commission for Latin America and the Caribbean, 2010).

In effect, Colombia’s tourism infrastructure shares the gaps described above. If we want to achieve an increase in these indicators that will result in an increase in the infrastructure criterion rating, the Vice Ministry of Tourism needs to have a leadership role in facilitating the coordination of each of the responsible entities, both public and private, and provide strategic guidelines on tourism needs in air, ground, maritime, and river infrastructure.



3.2 Colombia Regional Tourism Competitiveness Index (ICTRC, as per its Spanish acronym)

The Colombia Regional Tourism Competitiveness Index, developed by the Centro de Pensamiento Turístico (Center for Tourism Thought), was created as an initiative of the Hotel and Tourism Association of Colombia (COTELCO) and the Fundación Universitaria Cafam in order to measure competitiveness in tourism so that local authorities and tourism sector stakeholders can prioritize the development of policies and projects aimed at improving the regions’ capacity to face the challenges of sustainable development.

The ICTRC defines competitiveness as “the capacity of a destination to sustainably insert itself in markets via the coordination of public and private stakeholders and the creation of differentiated, high-quality, innovative, and attractive products that create positive experiences and high added value for tourists and visitors. Therefore, the destination’s competitiveness is bolstered through the strategic planning and management of comparative and competitive advantages in such a way as to enhance socioeconomic development and conserve both cultural and social resources, as well as the destination’s ecosystem services” (Centro de Pensamiento Turístico – Colombia, 2019, p.17).

This measurement is carried out in 30 departments around Colombia, plus the Capital District, by means of 8 measurement criteria composed of 105 factors. The national measurement criteria and the average departmental scores (out of 10) per criterion are: “cultural: 5.45, environmental: 4.80, destination management: 4.68, economic: 4.82, business: 2.54, marketing strategy: 5.44, social: 3.97, and infrastructure: 5.40.”³⁴ Infrastructure has the third best score after the culture and marketing strategy criteria, and is defined as:

“part of a destination’s tourism options, supports productive and social development, allows for experiences in the destination. Public services, communications, health, air and ground transportation terminals, and accessibility for people with disabilities, among others” (Centro de Pensamiento Turístico – Colombia, 2019, p. 19).

In this context, infrastructure is evaluated on the basis of 22 indicators that can be classified into the following categories:

- Network connectivity (broadband Internet service penetration rate, broadband Internet connection speed, and dropped calls on the cell phone network)
- Health services (health care institutions, high-level health care institutions, availability of hospital beds, and availability of ambulances)
- Financial accessibility (ATMs and availability of credit card machines)
- Public utilities (water service coverage, sewage service coverage, sanitation service coverage, electricity service coverage, and natural gas service coverage)
- Air and road connectivity (air operations by airport, ground transportation terminals, paved roads in good condition, domestic air connectivity, international air connectivity, seats offered on domestic commercial flights, and seats offered on international commercial flights).
- Accessibility for people with disabilities (accessibility plans for people with disabilities)

The ICTRC identified opportunities for improvement in the infrastructure criterion, pointing out shortcomings where capital cities can improve their indicators with respect to national and international air connectivity and their ground transportation terminals, focusing on facilitating destination connectivity (Centro de Pensamiento Turístico – Colombia, 2019, p. 77).

Figure 7 illustrates the infrastructure indicators by department, making it possible to analyze the difference in indicator scores between the center and the periphery of Colombia. For example, the departments where the major cities are located have the highest indicators: Antioquia (7.7), Valle del Cauca (7.8), and Bogotá (9.1). In contrast, departments such as Vichada (0.8), Vaupés (1.8), and Amazonas (2.5) have the lowest numbers. The departments of Guainía and Chocó were not considered in the ICTRC.

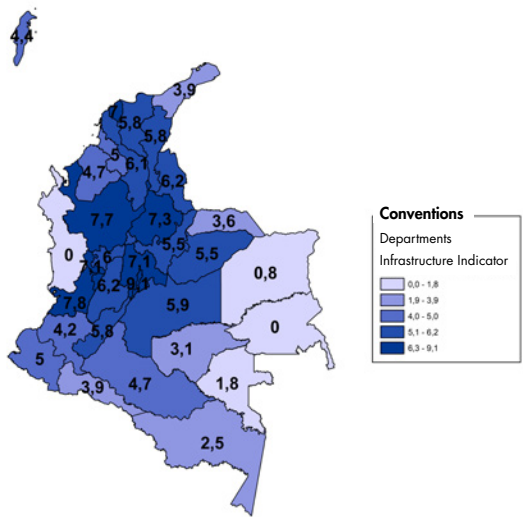


Figure 7. Department Rating – Infrastructure Criterion ICTRC 2019.
Source: Prepared by MinCIT with information from the Centro de Pensamiento Turístico – Colombia, 2019.

Moreover, several departments share low scores in certain criteria. For example, the criterion that measures the institutions providing high-level health services tends to be low in the vast majority of departments. This is also the case for the criterion of accessibility for people with disabilities. On the other hand, the criteria related to public services infrastructure are generally among the highest scores in each department. However, the natural gas service coverage criterion shows strong contrasts, since some departments have a very low score, while others exceed the national average—the latter corresponding to departments where the main cities or districts are located.

3.3 Conceptualization of tourism infrastructure

Contributions from academia:

In order to formulate this policy, different definitions of tourism infrastructure were compiled, based on different theoretical references. First, some proposals for measuring the competitiveness of tourism destinations need to be identified.

Crouch and Ritchie (1999),³⁵ pioneers in the field, developed the *competitiveness model* known as the “Calgary Model,” which provides a framework to help a destination compete more effectively and thus contribute to the local population’s wellbeing. This model considers two aspects: i) comparative

advantage, understood as endogenous resources, such as: human resources, physical resources, knowledge of resources, availability of capital, tourism infrastructure, historical and cultural resources, and size of the economy, and ii) competitive advantage, understood as the resources deployed, such as: ability to use these resources effectively in the long term (audit and inventory, maintenance, growth and development, and efficiency and effectiveness).

On the other hand, authors Dwyer and Kim (2003), contribute with a model for measuring competitiveness called the “Integrated Model,” taken as a reference from the model proposed by Crouch and Ritchie (1999) and considered as one of the most complete. This model introduces aspects such as inherited resources, created resources, and supporting resources.³⁶

- **Created resources:** This is made up of tourism infrastructure, recreational activities, as well as trade, etc.
- **Inherited resources:** These are the territory’s own resources, such as natural resources and historical and cultural heritage.
- **Supporting resources:** These include infrastructure in general, the quality of services, accessibility, and hospitality. They are resources that allow for the success of the tourism industry.

This model makes a first approximation to the concept of tourism infrastructure, differentiating it from general infrastructure, depending the type of resource.

Moreover, according to Roberto C. Boullon (2006),³⁷ in order for the tourism system to function, attractions and tourist facilities must have adequate infrastructure.

According to the author, “the services sold to tourists are developed by a subsystem that we call the tourist facilities, which is composed of two elements: a) the equipment, and b) the infrastructure.”

Equipment includes accommodation (hotels, hostels, lodges, cabins, etc.) and food (restaurants, cafeterias, etc.), recreation (clubs, bars, movie theaters, casinos, theaters, etc.), and other services (travel agencies, guides, commerce, convention facilities, tourist transportation, etc.). As for infrastructure, the author includes: marinas, jetties, piers, docks, underwater observation, lookouts, trail circuits, cable cars, funiculars, swimming pools, walkways, bridges, children’s games, other sports, etc.

In terms of infrastructure, Boullon indicates that by establishing that tourism infrastructure exists, a new form of qualification is being created based on the source of financing and the main user. Its usefulness lies in the fact that it can be used to define the nature of investments and the scope of their benefits in the evaluation and formulation of tourism projects. But their existence does not invalidate the systems used in urban and territorial planning. Infrastructure that could be applied to the tourism field includes: i) ground, air, and water transportation, ii) communications, iii) sanitation (water and sewage systems, garbage collection, and health), iv) energy (electricity and fuel).

Regarding tourist attractions, the author states that tourist attractions are tourism’s raw material, without which a country or a region cannot undertake development. Tourist attractions are included as the first element of the sector’s production structure, to which tourist facilities and infrastructure are added. The following are considered tourist attractions: natural sites, museums and cultural demonstrations, folklore, modern artistic, scientific, or technical achievements, and programmed events.

Furthermore, for Alexander Panasiuk (2007),³⁸ tourism infrastructure is a component of the regional tourism product, composed of basic equipment, facilities, and institutional services whose existence is crucial for the economy and society to operate.

He also establishes that when the infrastructure’s basic function is for tourism, such elements are included in tourism infrastructure. Even when the elements are used not exclusively by tourists, they are included in tourism infrastructure, whose existence depends on tourism development.

According to Panasiuk, the structure of tourism infrastructure consists of the following elements:

- “Typical tourism infrastructure: accommodation facilities, tourist orientation services, tourist information, and roads, among others.
- Infrastructure for tourism: transportation facilities (roads and transportation points), local facilities (including public and shared transportation), commercial facilities and services.
- Elements that cannot be unequivocally classified, whose function and results serve the purpose for which they were built: gastronomy, support facilities (sport and leisure, culture and entertainment).”

Another point highlighted by the author is that he also understands infrastructure according to who manages it, divided into three categories:

- “Commercial: hotels, gastronomy, tourist destinations, tourist packages
- Public: railroads and trains
- Mixed: information and support.”

Finally, for Blanco (2008),³⁹ tourism infrastructure is “the endowment of goods and services that a territory uses to sustain its social and productive structures, and as such, enables tourism development. It includes the following:

- Basic services: water, electricity, telephone, garbage collection, health system, etc.
- Transportation: ports, airports, buses, taxis
- Roads: existing routes, condition
- Services: commerce, health, education, communications, etc.”

General infrastructure serves as the baseline so that the destination’s conditions allow for the population to easily develop as an active society. As mentioned, tourism infrastructure allows for tourism development; for this reason, strategic plans and efforts are needed so that each destination may maintain such infrastructure and tourists can enjoy themselves and feel comfortable, with access to the facilities and/or services they require.⁴⁰

Contributions from other benchmark countries:

Tourism infrastructure needs vary from country to country and are prioritized according to the importance of tourism in each nation’s GDP. Different roadmaps have been identified around the world to address and build up infrastructure available for tourism.

An analysis of the tourism infrastructure planning mechanisms used by other countries shows that Mexico has a national infrastructure program. Chile, Argentina, and Spain’s Canary Islands project the development of tourism infrastructure through national tourism infrastructure plans or at least consider tourism infrastructure to be a key chapter within the nation’s infrastructure plan or the national tourism policy. However, it is important to clarify that there is no public policy that exclusively establishes guidelines for developing tourism infrastructure.

Case Study: Mexico

In the case of Mexico, tourism competition is operated directly by the Secretariat of Tourism (SECTUR), whose mission is to “lead the design and implementation of public policies aimed at boosting the development of tourism activity, promoting innovation in the sector, improving

the quality of tourism services and the competitiveness of national tourism, promoting cross-cutting strategies that coordinate governmental, private and social sector actions, and contributing to the sustainable and inclusive growth of tourism” (Mexico, 2011).

The planning mechanism for the development of tourism infrastructure is defined through the National Infrastructure Program, which takes the tourism sector into account with the following interventions: urban infrastructure in Magical Towns, rehabilitation, furnishing and restoration of historical and urban centers and attractions in tourist destinations, beach recovery projects, projects at tourism points of interest, construction of new tourist attractions, public beach parks, construction of logistics infrastructure for airports, highways, and ports, improvement of urban installations in historic centers, creation of wastewater and solid waste sanitation infrastructure, and comprehensive tourism infrastructure in protected natural areas.

Case Study: Chile

In the case of Chile, the development and promotion of tourism is the responsibility of the Institutional System for the Development of Tourism, composed of the Committee of Ministers of Tourism, the Sub-Secretariat of Tourism, the Advisory Council for Tourism Promotion, and the National Tourism Service.

The Sub-Secretariat of Tourism, along with the Ministry of Public Works, formulated the Special Infrastructure Plan to support sustainable tourism until 2030, which includes the following interventions: rural drinking water, rainwater, coastline, fishing and tourist coves, bicycle paths, tourist corridor roads, public buildings, cultural infrastructure, tourist services and information infrastructure, air transport infrastructure, ground transportation infrastructure, river defense infrastructure, border facilities, heritage buildings, scenic routes, interpretive trails, water sports infrastructure, irrigation and waterway management.

Case Study: Argentina

In Argentina, the Ministry of Tourism and Sports formulated the National Tourism Infrastructure Plan as a bid to improve tourism destinations and products in order to attract and capture private investment, thus making it possible to create more employment opportunities and regional socioeconomic development.

This plan considers the following interventions as tourism sites and structures: i) Tourist Information Units: information, interpretive, or visitor centers; ii) tourist facilities: bird observatories, lookout points, trails, docks, sanitary facilities, shelters, urban furniture, interpretive panels; iii) revaluation of natural and cultural heritage: restoration, urban preservation, rehabilitation of areas of historical value that are not declared national historical monuments, etc. In all cases, they must have a touristic purpose (museum, interpretive center, tourist circuit); iv) tourism signage: within the framework of the National Tourism Signage System Handbook; v) renewable and sustainable energy (wind, solar); and vi) smaller-scale basic infrastructure.

Moreover, the plan defines works impacting tourism as those that are carried out through collaborative management within the framework of an Inter-Ministry Committee and correspond to: i) transportation: ground-air-aquatic: road network, river terminals, bus terminals, airports; ii) communication: telephone-Internet; iii) sanitation: includes drinking water, water mains, sewage and storm water drainage, etc.; iv) energy: electric grid and alternative energy.

Based on the aforementioned references and as a result of the working groups, for this policy, tourism infrastructure will include the following elements:

TERM	DEFINITION	TYPE
Typical tourism infrastructure	This infrastructure improves or makes the tourist’s experience possible when arriving at the tourist destination.	Accommodations (hotels, lodges, campgrounds, tourist housing, other types of non-permanent lodging, etc.)
	This category includes the equipment (accommodation and leisure) and infrastructure of tourist facilities.	Recreation (theaters, theme parks, etc.) Facilities: Marinas, docks, lookouts, bird watching, beach management and recovery, trail loops, cable cars, funiculars, walkways, boardwalks, signage, etc.
Tourism support infrastructure	The infrastructure necessary to establish the tourist destination.	Logistics infrastructure for airports, roads, railroad services, and ports

Table 5. Scope of tourism infrastructure in the policy.
Source: Prepared by MinCIT (2020).

3.4 Infrastructure developed through FONTUR

The type of tourism infrastructure that the government has developed through FONTUR mainly corresponds to tourism signage, parks, trails, restorations, theme parks, piers, docks and boardwalks, convention centers, and other initiatives.⁴² According to information available at FONTUR, in the period between 2013 and 2020, COP 582.9 billion were invested through this entity in 213 approvals for tourism infrastructure throughout Colombia (in studies, designs, construction projects, and equipment). Of this amount, the Ministry of Trade, Industry, and Tourism—through FONTUR—has invested COP 562.6 billion, and local and regional authorities and others have contributed COP 20.3 billion in counterpart contributions.

The infrastructure operated by the Vice Ministry of Tourism through FONTUR differs from that which contributes to the calculation of the competitiveness indicators described above, since these assess other pillars. Therefore, adopting a strategic vision will guarantee that the resources allocated by this ministerial portfolio and implemented by FONTUR will be invested in infrastructure that will have a positive impact on this major sector of the economy.



3.5 Conceptual aspects of infrastructure projects⁴³

According to the Department of National Planning's Project Theory Training Module Guidelines, the lifecycle of a project includes the stages that it must go through—from the moment of its conception, when the central problem and the characteristics of the current situation are identified, to assessing the fulfillment of its objectives and goals, which must be a complete or partial solution to the identified problem.

There are four stages in this cycle for a public investment project, which are presented sequentially as shown in the following chart:



Figure 9. Project lifecycle: connection of stages and phases

The following is the definition given by the Department of National Planning to each of the stages, identified in Figure 9, through the Project Theory Training Module Guidelines.

Pre-Investment Stage

The pre-investment stage is where all the analyses and studies required to define the problem and identify the best alternative solution are carried out, after having evaluated all the available options.

Within this stage, there are three phases—profile, pre-feasibility, and feasibility—which can be applied according to the problem's degree of complexity. The stages differ from each other based on how much they reduce the level of uncertainty, which is achieved by each stage providing additional information about project implementation.

Profile phase:

In this phase, the formulation and structuring of the selected alternative solution(s) is carried out based on the identified problem. Therefore, the analysis and evaluation must move forward at their own pace, using information from secondary sources. As a result of the studies from the profile phase, the following decisions can be made: reformulate the project, postpone the project, discard the project, or continue with the ensuing pre-feasibility or feasibility phases.

Pre-feasibility phase:

In the pre-feasibility phase, a more in-depth analysis of the suitability of the alternative(s) is carried out, depending on the availability of information and the level of precision required according to the project type. More exhaustive studies should be carried out, which may require the use of primary information sources to complement existing ones. As a result of the pre-feasibility phase, the following decisions can be made: reformulate the project, postpone the project, discard the project, or continue with the feasibility phase, once the best alternative—the one that provides the greatest net benefits for society as a whole—has been selected.

Feasibility phase:

In the feasibility phase, a more detailed study is required for the selected alternative. In this way, it is possible to establish whether or not to invest in the project, according to the ex-ante evaluation criteria used.

In this phase, the previous studies are delved into in more depth, especially the technical studies related to detailed engineering studies, as well as others that address legal and institutional aspects related to coordinating actions, assigning responsibilities, managing risk, financial aspects, and determining financing sources. Moreover, the conditions of the work are defined, as well as the implementor's characteristics, guaranteeing the sources of financing for its implementation.

The evaluation of this phase concludes the pre-investment stage, either because it shows positive results that recommend moving on to the next stage and scheduling its implementation, or because it shows negative results that indicate a preference toward rejecting or postponing the project.

Prior to beginning the investment stage, the procedures that will allow project implementation must be followed, including the request for environmental permits and/or licenses, urban planning licenses, or others.

It is important to point out that pre-investment is one of the main points in the project lifecycle, since an accurate assessment and sizing of the resources required for its implementation depends on this stage. This makes it possible to minimize the risks associated with implementation. Therefore, correct project formulation and structuring is one of the most important components for efficient and effective expenditure management.

Investment Stage

After the pre-investment stage, the project lifecycle continues with the investment and operation stages. These two stages are characterized by the implementation of project activities and the delivery of the goods and/or services intended to meet the social needs that gave rise to the project.

In the investment stage, all the activities planned to meet the scope and objectives proposed in the project formulation are implemented, which include: implementing the proposed works; completing procedures and obtaining required permits; contracting suppliers for materials; managing personnel, equipment, and materials; coordinating with the various stakeholders involved in the project; overseeing the budget; scheduling; supervising and auditing; and other management actions such as monitoring, follow-up, and oversight.

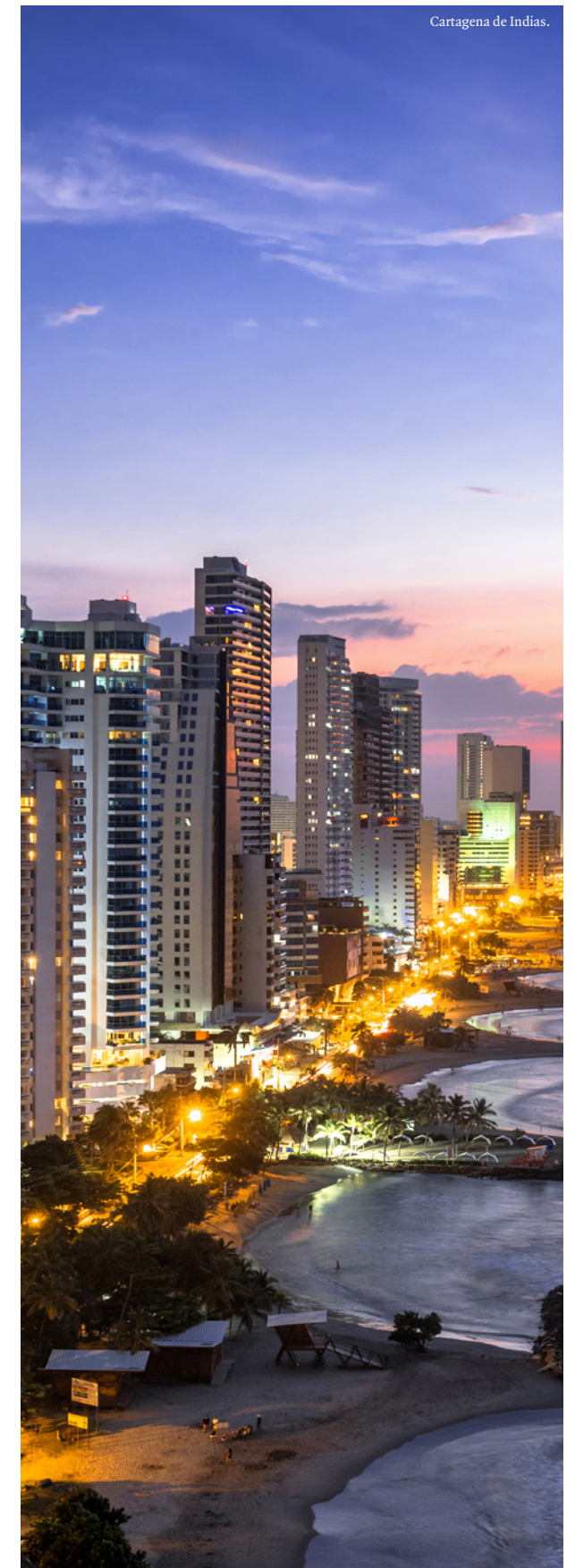
Operation Stage

The operation stage is the period of time in which the project becomes operational and therefore the expected benefits are received by the population, according to the established objectives.

Within the project evaluation goals defined in the pre-investment stage, operating and maintaining the infrastructure is essential. This is to ensure that the results of the ex-ante evaluation process include the costs associated with the activities required to fulfill this objective and avoid jeopardizing the project's financial closure, and thus, the fulfillment of its objectives.

Ex Post Evaluation Stage

The last stage of the project lifecycle has to do with follow-up, monitoring, and evaluation (economic, social, and/or financial) to verify compliance with the projections made in the pre-investment stage, which are represented in the planned objectives, the creation of outputs, and the estimated benefits. This is in order to identify achievements and roadblocks that will provide feedback for the formulation, implementation, and operation of other projects.



4. Diagnostic

Over the last decade, the tourism sector has expanded significantly, greatly contributing to Colombia’s economic growth. In 2010, Colombia received around USD 2.8 billion⁴⁴ in foreign revenue in travel and transportation, according to figures from payment balances, and by 2019, Colombia received approximately USD 6.751 billion⁴⁵ in foreign revenue in the same areas.

This industry’s growth can be attributed to several factors, including the government’s commitment to sustainably and responsibly establishing high-quality tourism products with a high economic impact. Thus, the 2018-2022 Tourism Sector Plan aims to “develop Colombia as a tourism destination in a distinct and innovative way, based on consolidating each destination’s focus and the competitive advantages of their attractions, services, activities, and products, while focusing on specialized and high-value tourism demand segments at a national and international level, emphasizing nature, cultural tourism, the meetings industry, and health and wellness tourism” (2018-2022 Tourism Sector Plan, MinCIT, p. 21).

Another relevant factor is the government’s commitment to developing, strengthening, and increasing “the infrastructure needed to promote high-value tourism and specialized products” (2018-2022 Tourism Sector Plan, MinCIT, p. 35).

Despite these efforts, gaps have been identified that still prevent tourism from becoming a major contributor to Colombia’s gross domestic product (GDP).



In terms of infrastructure, the working groups identified the following weaknesses while formulating the policy: i) deficient specialized technical capacity to manage tourism infrastructure projects; ii) insufficient strategic planning of investments in tourism infrastructure; iii) poor use of financing mechanisms for investment in tourism infrastructure; iv) poor coordination while managing and developing infrastructure to support tourism at the national level; v) poor implementation of innovative mechanisms while developing smart tourism infrastructure; vi) absence of actions to promote sustainable tourism infrastructure.

The following is a description of the main causes identified in Colombia, which show the need to develop a tourism infrastructure policy.





4.1 Deficient specialized technical capacity to manage tourism infrastructure projects submitted to FONTUR

Colombia has significant weaknesses in project structuring, which are evident throughout the investment cycle (CONPES Document 3856, p. 7). Examples of this situation include the lack of projects submitted for approval, the return of the initiatives by the agencies assessing feasibility due to deficiencies in the quality of the proposal, and weaknesses in the studies and designs. This reality causes additional difficulties, such as the need to make adjustments to the studies and designs, with the respective associated costs, delays in the contracting processes, and problems in implementation that affect the initial schedules, as well as the levels of completion and the initially estimated costs. (CONPES Document 3856, p. 7).

According to what was identified in the various working groups assembled to formulate the policy, the tourism sector also has a poor capacity to formulate, implement, and operate tourism infrastructure projects, which hinders the management and proper implementation of these initiatives. Therefore, this condition needs to be addressed and these capacities strengthened through technical assistance strategies, training, and workshops aimed at project proponents.

In addition to the above, when filing infrastructure projects, the “FONTUR P.A. Project Presentation Form”⁴⁶ must be completed, along with the annex “Requirements for the presentation of Infrastructure projects 2020,”⁴⁷ using methodologies for formulating and structuring public investment projects different from those suggested by the Department of Planning (DNP), such as the Adjusted General Methodology (MGA, as per its Spanish acronym). This methodology covers the main elements of project theory in the pre-investment stage, corresponding to project identification, preparation, evaluation, and programming.

Additionally, in order to present projects to FONTUR, project operation and maintenance by local and regional authorities have not been taken into account, even though they are essential aspects to consider in the pre-investment stage.

The aforementioned is important in order to determine the costs associated with the operation and maintenance of the goods or services delivered by the project, and to avoid jeopardizing financial closure and thus, the fulfillment of its objectives (Project Theory Training Module Guidelines – DNP, 2014).

In turn, the P.A. FONTUR Version 0.9 *Project Presentation* form establishes management, impact, and product indicators that differ from the tools for the definition and use of indicators in public management established by the DNP, which are framed in the value chain—one of the preferred planning tools in public management thanks to its scheme and practical procedure that simplifies the analysis and understanding of public policies.

The indicators established by the DNP correspond to management, output, and impact indicators. As a result, it is currently not possible to measure the impact of the tourism infrastructure projects that have been implemented. The following is a detailed description of each indicator established by the DNP:

- Management: quantifies the physical, human, and financial resources used in developing the actions and measures the number of actions, processes, procedures, and operations carried out during the implementation stage.
- Output: quantifies the goods and services (intermediate or final) produced and/or provided as a result of a given intervention, as well as the changes brought about by the intervention that are relevant to achieving the outcomes.
- Impact: measures the resulting changes in the target population’s wellbeing as a consequence (direct or indirect) of the delivery of the products (Guide for Indicator Construction and Analysis – DNP, p. 12).

Similarly, although the handbook for resource allocation and presentation of FONTUR projects establishes the strategic line for tourism infrastructure, it does not specifically define the types of projects that can be financed through this line. Moreover, it is necessary to align what is defined in the handbook with the project phases (profile, pre-feasibility, and feasibility) established by the DNP in the Project Theory Training Module Guidelines.

4.2 Insufficient strategic planning of investments in tourism infrastructure according to regional focus

The successful management of public resources is the result of an adequate public investment cycle, which includes: i) planning, ii) programming, iii) implementation, and iv) evaluation.⁴⁸ Adequate planning of public investment reduces budgetary and contractual risks, increases the probability of project success, and improves the provision of public goods and services in accordance with the regions’ needs. Ultimately, it facilitates a better allocation and more efficient use of investments, all of which is important to achieve higher quality public investment that increases its contribution to Colombia’s development.

Public investment planning should allow for the appropriate allocation of public resources, aiming to achieve economic and social development objectives in the regions. This is important in order to define infrastructure projects that respond to the population’s needs, each region’s objectives, and their own potential as a tourist destination.

Currently, the Vice Ministry of Tourism does not have an instrument to identify investment needs in tourism infrastructure in the regions and other sectors that contribute to tourism, nor does it have a tool to prioritize investments that would lead to a better allocation of resources and thus enhance the regional focus. Therefore, the implementation of a “Bank of Tourism Infrastructure Programs and Projects” is required in order to have timely and detailed information on investment requirements, the projects that require financing, as well as each project’s implementation status.

For example, when analyzing the financing history of FONTUR’s tourism infrastructure, it is evident that projects have been developed based on certain regions’ specific demands, and sometimes these initiatives do not respond directly to the strategic needs of the large-scale tourism infrastructure that Colombia requires.

Along the same lines, the analysis of whether the financed projects are in line with each region’s tourism development or its focus needs to be improved. For this reason, it is also difficult to measure the impact of tourism infrastructure projects in terms of increasing the sector’s competitiveness.

Furthermore, although the handbook for resource allocation and presentation of FONTUR projects establishes a strategic line for tourism infrastructure, it does not clearly define the guidelines for investing in these projects. Thus, for example, the types of projects that can be considered as tourism infrastructure are not clearly specified (FONTUR, 2020, p. 30). As of June 2020, FONTUR had invested in more than 46 construction projects in the “other” category, which corresponded to projects such as villages, lighthouses, lookout points, small squares, cable cars, and tourist lodging, among others.

This demonstrates the need to establish guidelines that clearly define the categories and tourism products to be enhanced through the implementation of infrastructure projects. Finally, with regard to support infrastructure for tourism, the sector agenda must be improved to allow for the coordination of investments with the stakeholders involved in this type of initiative. The portfolio of investment opportunities for the private sector must also be improved by coordinating actions with ProColombia’s Investment Promotion Agencies.



4.3 Poor use of financing mechanisms for investment in tourism infrastructure

Structuring and formulation constitute one of the fundamental pillars in the project lifecycle. Adequate structuring depends not only on the correct valuation and sizing of the resources required for their development, but also on proper project implementation, which determines the quality and final optimization of the investments made.

Thus, special importance should be given not only to project implementation, but also to the structuring and formulation of investments. For this reason, existing financing mechanisms should be used to develop these stages of the projects. An analysis of the projects financed through FONTUR in recent years shows that only a small proportion corresponds to studies, designs, pre-feasibility, or feasibility.

Over the last 8 years, Colombia has invested more than COP 580 billion in tourism infrastructure projects, with an estimated 213 projects approved through FONTUR. Out of this amount, the Ministry of Trade, Industry, and Tourism—through FONTUR—has invested close to COP 562 billion, and local and regional authorities and others have contributed the remaining COP 20 billion in counterpart funds. Therefore, the main source of financing to implement the projects is FONTUR, contributing 98% of the funds.

On the other hand, of the 18,240 projects approved through the General Royalties System (SGR, as per its Spanish acronym) between 2012 and 2019, only 135 projects belong to the Trade, Industry, and Tourism sector—59 of which correspond to the tourism subsector, denoting a low rate of use of this funding source for project implementation. For this reason, there is a clear need to identify mechanisms so that SGR resources may become a leading source for tourism infrastructure projects in Colombia.

In addition, as evidenced, the major source of financing for tourism infrastructure projects is FONTUR. As such, other mechanisms have not yet been explored or taken advantage of, including the participation of private stakeholders and the design of innovative models for project structuring that would allow for their financing and development—such as public-private partnerships (PPP) or resources from the Science, Technology, and Innovation Fund (for research and innovation projects in tourism)—as well as promoting the search for resources and technical assistance from international cooperation agencies in order to improve the sector’s competitiveness.

The support infrastructure for tourism must strengthen the multi-sector agenda that allows investments to be connected with the stakeholders implementing this type of initiative. This demonstrates the need to transition towards other models that will make it possible for different stakeholders to converge and new financing models to be implemented.

Colombia’s commitment to the nautical tourism plan has created an increase in tourism in coastal areas, developing Colombia’s nautical culture.⁴⁹ In this sense, the consolidation of tourism and nautical activities in the Colombian Caribbean and Pacific coasts must begin with the design of a series of initiatives. In order to achieve the expected growth in this type of tourism at the national and international level, financing mechanisms must be defined in order to develop nautical infrastructure that can absorb the new demand.

Furthermore, Colombia must focus on promoting investments to improve El Dorado International Airport, as well as developing infrastructure in Colombia’s hub and regional airports. This is due to the fact that El Dorado recorded high occupancy levels according to cargo and passenger air operations statistics in the last quarter of 2019, with a total of 81,145⁵⁰ operations for landings and takeoffs, and taking into account that Colombia could reach 94.3 million passengers per year by 2030, according to the Colombian Civil Aviation Authority.

Finally, private investment is one of the most significant potential sources of financing for tourism infrastructure in Colombia. Therefore, it is of vital importance to create strategies to attract these investors in order to enhance the development of large-scale projects, such as Special Tourism Projects, which aim to significantly contribute to achieving the tourism goals set forth in the National Development Plan and in the Tourism Sector Plan. They also aim to create direct or indirect benefits in the following ways: through the institutional strengthening of Colombia as a tourism destination; by attracting investment in infrastructure and connectivity for tourism; by greatly increasing the sector’s productivity and competitiveness at the national or regional level; through innovation and business development in the tourism sector; and by building up human capital for tourism competitiveness.

4.4 Poor coordination while managing and developing support infrastructure for tourism at the national level

There have been some deficiencies in institutional coordination between national, departmental, and municipal governments—as well as between entities at the same level of government—which has not allowed for effective agility in tourism management from a governance perspective.⁵¹

The development of support infrastructure for tourism, which is taken into account in the weighting of the TTCI index and the ICTRC, is the responsibility of the different national, regional, and local authorities identified in Figure 6. In this sense, responsibility for the development of the components and indicators measured in the aforementioned indices falls on various stakeholders in the public sector at different levels of government, and even on stakeholders in the private sector.

As a result, the Vice Ministry of Tourism faces the challenge of coordinating with local, departmental, and national stakeholders to manage the infrastructure that supports tourism, which plays a crucial role in the development of tourist destinations in terms of productivity and competitiveness.

It is worth noting that Colombia ranks 81 out of 141 in the Infrastructure Pillar, according to the WEF’s 2019 Global Competitiveness Report, a ranking obtained through the assessment of the following components:

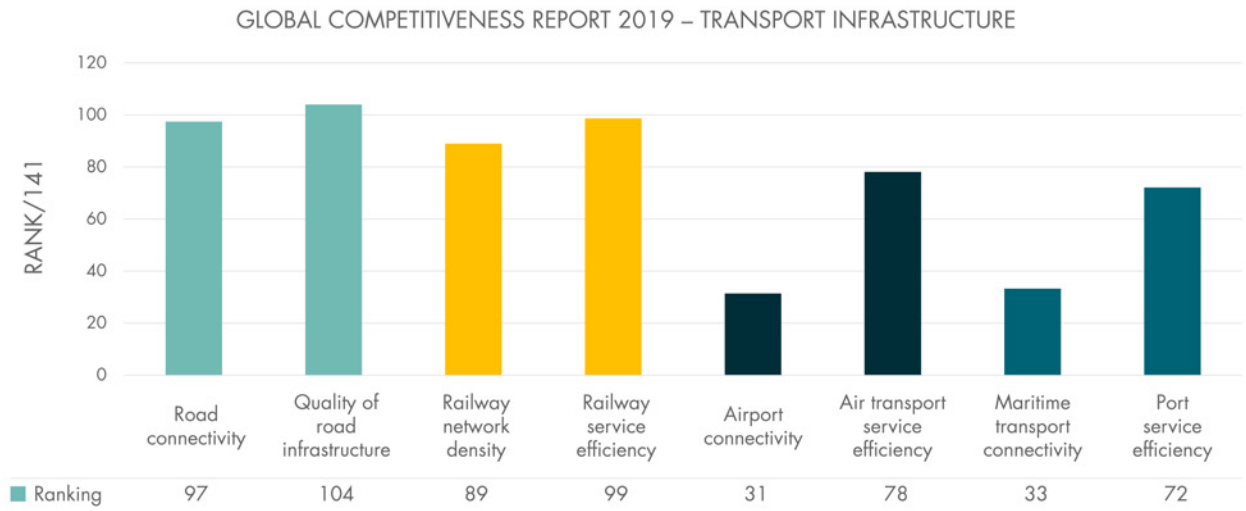


Figure 10. Global competitiveness 2019 – WEF
Source: Prepared by MinCIT 2020 based on the report

An analysis of the above reveals that Colombia needs to focus its efforts on improving the quality of road infrastructure and the efficiency of railroad, air, and port transportation services.

The 2018-2022 Tourism Sector Plan outlined the objective of implementing effective governance in the sector and in Colombia’s regions. Since its publication, the need to implement a system of tourism governance has been identified, so that all government sectors, as well as the various stakeholders around the country, would join efforts to improve the communication and prosperity of the tourism sector in general. The Tourism Sector Plan also promotes joint efforts to improve work agendas, support, oversight, and follow-up channels for investment projects, as well as to improve local and regional authorities’ access to investment lines. This is an opportunity to reinforce the role of comprehensive and coordinated support infrastructure through effective territorial governance, as well as improve their development, competitiveness, and productivity.⁵²

4.5 Poor implementation of innovative mechanisms while developing smart tourism infrastructure

Innovation has been an unknown field of application for the development of public infrastructure in Colombia. Although efforts have been made to improve connectivity and access to information in the regions⁵³, the tourism sector continues to lag behind in promoting innovation mechanisms—specifically in infrastructure—in order to provide technology and access to tourist destinations. In contrast with this national panorama, the following examples highlight international advances in innovative infrastructure development:

For example, through the Smart Tourist Destination program, Spain unifies the concepts of governance, sustainability, accessibility, knowledge, and technological innovation around tourist destinations by defining these as pillars for implementing a new tourism model. This way, the country manages to establish comprehensive tourist sites characterized by easy access, thanks to the infrastructure and development of technological tools while rooted in environmental awareness. This methodology not only changes tourists’ experience, but also increases the residents’ quality of life, increases competitiveness, and favors efficient production and commercialization processes (Sociedad Mercantil Estatal para la Gestión de la Innovación y las Tecnologías Turísticas, S.A.M.P., 2018).

This country has progressed with a strategy of destination revaluation through innovation and technology by improving user experience through the use of tools such as geographic information systems and mobile infrastructure (Luaces, Pedreira, Place, & Seco, 2008).

Australia, a country known for driving innovation, focuses on improving governance through open data, via Smart Tourism (Gretzel, Sigala, Xiang, & Koo, 2015). In East Asia, Smart Tourism actions focus on policies that promote the development of technological infrastructure, while in Europe, most initiatives connected to Smart City projects have favored the emergence of the smart destination approach. In Europe, initiatives are more associated with innovation and competitiveness, through the development of applications to improve the tourism experience (SEGITUR, 2015).

As for neighboring countries, Peru has tools such as “Beacons” for smart tourism signage, consisting of electronic devices located in tourism signage equipment that provide information to tourists, allowing them to identify points of interest and services around them, thus making their experience more enjoyable (Vásquez, 2018).

In addition, the Heroica Smart – Smart City project in Tacna and Ayacucho is being developed as the next smart city. This project aims to establish a smart city model with the objective of improving four components of the city: tourism, citizen advocacy, ecology, and safety, through the collection of information. Regarding the tourism component, a platform provides tourists with consolidated information on restaurants, lodging, shopping centers, tourist sites, etc. (Liendo, 2020).

Analyzing the above, Colombia faces great challenges in implementing technology related to managing tourism infrastructure, despite the progress made in this area. Efforts need to be focused on improving information systems for tourism, investing in smart tourism signage projects, considering accessibility components, and incorporating incentives to increase innovation in tourism infrastructure.

4.6 Absence of actions to promote sustainable tourism infrastructure

Infrastructure is considered one of the fundamental pillars of the economy and a way to increase national and regional competitiveness. However, infrastructure can also have a negative impact on society and the environment if its design, construction, and operation are not in keeping with its surroundings.

Although the implementation of sustainable construction and design practices for infrastructure can play a fundamental role in protecting biodiversity and its ecosystems, technical sustainability criteria for tourism buildings have not yet been established in Colombia.

Colombia has not yet developed strategies to integrate sustainability guidelines in the different lifecycle phases of tourism buildings, nor has it implemented incentives to encourage investment in sustainable tourism infrastructure (Sustainable Tourism Policy, 2020).

For example, to propose projects to the National Tourism Fund, there is currently no incentive for proponents to incorporate sustainability practices in their projects, since there are no criteria that explicitly assess whether they contribute to mitigating, controlling, or managing the environmental impacts associated with tourism activities.

These difficulties were also identified in CONPES 3919 “National Policy on Sustainable Buildings,” in the national context for public, private, new, and used buildings in the rural and urban sectors:

- “Weak implementation of public policy instruments for the inclusion of sustainability criteria in all buildings and within all stages of building lifecycles.
- Poor sector information for monitoring the building market and the implementation of existing regulations with sustainability criteria.
- Lack of incentives for the implementation of sustainable construction initiatives” (CONPES Document 3919, 2018, p. 42).

According to the above, there is a need to strengthen programs and projects to encourage sustainable infrastructure in Colombia and coordinate technical sustainability criteria⁵⁴ so that tourism buildings achieve an integrated approach.

This policy must also consider identifying obsolete or disused public infrastructure works that can be recycled or reused as a strategic option in promoting sustainable infrastructure. On one hand, this will allow for infrastructure to be renovated and used in a new way, including for tourism, while on the other, it will encourage national, regional, and local authorities to identify options for such transformations that respond to the needs of tourism destinations.



5. Policy structure

5.1 General objective

Reinforce the processes of formulation, planning, management, evaluation, and follow-up of projects aimed at the sustainable development of tourism infrastructure that coherently responds to the needs of the regions and local populations, promoting efficient coordination with other institutions that promote strategic infrastructure for Colombia.

5.2 Specific objectives

- Increase technical capacity to manage tourism infrastructure projects.
- Implement tourism infrastructure planning strategies that respond to each region’s tourism focus and the needs of the tourism sector.
- Facilitate financing mechanisms for investment in tourism infrastructure.
- Improve interinstitutional coordination to manage and develop support infrastructure for tourism.
- Promote innovative mechanisms to develop smart tourism infrastructure.
- Implement actions to consolidate sustainable tourism infrastructure.

5.3 Logical Framework Matrix

The following matrix shows the specific objectives, along with their causes, effects, and specific problems. These six (6) specific objectives lead to six (6) strategies composed of fifteen (15) projects and fifty-one (51) actions that become the pillar of this public policy document. (See Table 6 and Annex 1. Logical Framework Matrix for programs, projects, and actions).

Table 5. Summary of logical framework matrix for tourism infrastructure policy

CAUSES	EFFECT	SPECIFIC PROBLEMS	SPECIFIC OBJECTIVE	STRATEGY
<ul style="list-style-type: none">▪ Lack of tools for the formulation of tourism infrastructure projects.▪ Low training or technical assistance for project formulation.▪ Low number of customized tools related to the project cycle submitted to FONTUR.	<ul style="list-style-type: none">▪ Poor presentation and financing of strategic infrastructure projects for tourism.▪ Delays in project implementation.▪ Slow contracting processes for project implementation.▪ Lack of knowledge of project impacts.▪ Unfinished projects or projects with sustainability problems.	Deficient specialized technical capacity to manage tourism infrastructure projects.	Increase technical capacity to manage tourism infrastructure projects.	1. TECHNICAL CAPACITY Specialization of knowledge to improve efficiency, effectiveness, and efficacy while managing projects carried out by local and regional authorities and the Vice Ministry of Tourism in the area of Tourism Infrastructure.
<ul style="list-style-type: none">▪ Insufficient knowledge of tourism infrastructure needs in the regions.▪ Lack of tools to prioritize and evaluate projects so that tourism infrastructure responds to the tourism development process and regional objectives.▪ Lack of clarity on the types and categories of projects that can be financed through FONTUR.	<ul style="list-style-type: none">▪ Infrastructure not coordinated with regional objectives.▪ Inefficient distribution of resources due to lack of coordinated planning aligned with regional objectives.▪ Construction projects are demand-driven and do not respond to strategic needs.	Insufficient strategic planning of investments in tourism infrastructure according to regional focus.	Implement tourism infrastructure planning strategies that respond to each region’s tourism objectives and the needs of the tourism sector.	2. STRATEGIC PLANNING Planning of tourism infrastructure at the national and local levels aligned with the regions’ objectives and needs in order to facilitate the sustainable development of tourism activities.

CAUSES	EFFECT	SPECIFIC PROBLEMS	SPECIFIC OBJECTIVE	STRATEGY
<ul style="list-style-type: none">▪ Lack of knowledge of funding sources, resources, and potential tools to build tourism infrastructure and lack of coordination among the different stakeholders (nation, department, municipalities, private, and cooperation agencies), which prevents efficient development of regions’ competitiveness▪ Lack of strategies to attract foreign investors.	<ul style="list-style-type: none">• Poor investment and development of tourism infrastructure projects needed to promote and improve regions’ competitiveness.• Low exploitation of the regions’ tourism potential.• Little investment interest from large foreign investors.• Presentation of projects along the same lines, not very innovative and do not create an impact.	Poor use of financing mechanisms for investment in tourism infrastructure.	Facilitate financing mechanisms for investment in tourism infrastructure.	3. FINANCING AND INVESTMENT Creation of opportunities and new financing mechanisms to manage investment in tourism infrastructure, recognizing potential investors, financiers, and tools that create tourism competitiveness in the regions.
<ul style="list-style-type: none">• Lack of work agendas between national government and regional entities.• Poor positioning of infrastructure in Colombia’s political agenda.	<ul style="list-style-type: none">• Lack of coordination of national entities in the vision of positioning and improving regions’ competitiveness through tourism infrastructure.• Lack of measurement of the impacts on tourism resulting from the projects.	Poor coordination in managing and developing infrastructure to support tourism at the national level.	Improve interinstitutional coordination to manage and develop support infrastructure for tourism.	4. GOVERNANCE Improve the institutional framework for tourism, seeking to better the quality of life and living conditions of local populations in the destinations.
<ul style="list-style-type: none">• Lack of strategies to promote the coordination of innovative ideas and smart infrastructures.• Lack of knowledge and appropriation of management mechanisms for the regions’ competitive development that promote the construction of tourism infrastructure.	<ul style="list-style-type: none">• Lack of coordination of the concepts of sustainability, accessibility, knowledge, and technical innovation around tourist destinations.• Deterioration of regions’ tourism competitiveness.• Poor development of initiatives that include SMART methodologies and components.	Poor implementation of innovative mechanisms to develop smart tourism infrastructure.	Promote innovative mechanisms to develop smart tourism.	5. INNOVATION Promotion and implementation of ICT/GIS/SMART55 management mechanisms to develop and improve sustainable tourism infrastructure projects.

CAUSES	EFFECT	SPECIFIC PROBLEMS	SPECIFIC OBJECTIVE	STRATEGY
<ul style="list-style-type: none">• Lack of a roadmap for the comprehensive inclusion of sustainability criteria within the lifecycle of buildings.• Lack of strategies to promote the coordination of sustainability concepts in infrastructure.	<ul style="list-style-type: none">• Poor development of tourism buildings in keeping with the surroundings, as well as a lack of coordination with environmental, economic, and social aspects.	Lack of actions to promote sustainable tourism infrastructure.	Implement actions to consolidate sustainable tourism infrastructure.	6. SUSTAINABILITY More green tourism infrastructure in harmony with the environment.

5.4 Strategies

The strategies defined as pillars that structure policy implementation are as follows:

5.4.1 Technical capacity

Specialization of knowledge to strengthen efficiency, effectiveness, and efficacy while managing projects carried out by local and regional authorities and the Vice Ministry of Tourism in the area of Tourism Infrastructure.

This is in order to address the low technical capacity available to the local and regional authorities that formulate tourism infrastructure projects and work to ensure that the identified initiatives respond to the needs of the tourism product's development and consolidation process in the destination.

With these goals, the policy lines will be guided by three projects, namely:

5.4.1.1 Toolkit for tourism infrastructure project formulation and management

- Apply parameters to the formulation of tourism infrastructure projects, using the DNP's adjusted general methodology (MGA).
- Apply parameters to FONTUR's tourism infrastructure projects with the phases established by the DNP.
- Prepare booklets with guidelines for the local and regional authorities to follow when developing projects (formulation, management, and sustainability of projects, differentiating elements in various types of tourism infrastructure, such as interventions in cultural heritage sites and/or historic centers).



San Andrés y Providencia. Photo: Unsplash, Darren Lawrence.

5.4.1.2 Technical advice on tourism infrastructure projects

- Provide technical advice to local and regional authorities and other stakeholders on the development of tourism infrastructure projects, in accordance with each region's focus.
- Technical assistance workshops with the DNP on the MGA methodology aimed at tourism infrastructure project formulators.
- Technical workshops for knowledge transfer and exchange of successful national and international experiences in tourism infrastructure (with academia, international institutions, private stakeholders, and national, regional, and local authorities).

5.4.1.3 Quality management in the development cycle of tourism infrastructure projects with FONTUR

- Apply parameters to processes for presenting, formulating, studying feasibility, and contracting of projects through FONTUR (feasibility, relevance, and adjustment forms).
- Analyze the need to update Colombian technical standards for tourism infrastructure.

5.4.2 Strategic planning

This defines the starting points and necessary actions to plan tourism infrastructure at the national and local levels, in accordance with each region's objectives and needs in order to facilitate the sustainable development of tourism activities. This is done by defining a strategic vision of where we are headed, and the tourism infrastructure needs that Colombia requires in order to enjoy an efficient and harmonious distribution of resources.

The above is framed within the development of the following projects and actions:

5.4.2.1 Development of a diagnosis of tourism infrastructure needs that will allow the subsequent identification of regional initiatives, and the creation and prioritization of investment opportunities

- Prepare an inventory of tourism infrastructure needs that will contribute to the consolidation of national tourist destinations with regional and local agendas.
- Identify infrastructure needs resulting from consulting studies on topics such as product design.
- Identify investment needs to develop their implementation through public-private partnerships.

- Coordinate identification of opportunities and destinations for foreign investment (Portfolio of investment opportunities) with ProColombia's Investment Promotion Agencies.
- Identify prioritized investment initiatives in the different sectors that develop support infrastructure for tourism at the national level.
- Identify the needs for investment in tourism infrastructure in national parks and cultural heritage sites or historic centers, as well as initiatives for recycling obsolete or disused public infrastructures that can be reused as tourism infrastructures.

5.4.2.2 Creation of a Bank of Tourism Infrastructure Projects that allows for a vision and traceability of projects from the idea stage to the execution and implementation phase, allowing for better control, follow-up, and monitoring of investments and their impacts

- Create the tourism infrastructure project bank (creation of institutional, methodological, legal, and technical tools for financing and management to guide the development of priority infrastructure projects for regional and national tourism development).
- Develop a project prioritization methodology for investment planning in tourism destinations (niches, tourism products and attractions, environmental characteristics, etc.).
- Develop a methodology for monitoring the operation, maintenance, and sustainability of tourism infrastructure projects developed through FONTUR.

5.4.2.3 Definition of types and categories of tourism infrastructure projects that can be presented to FONTUR to provide greater clarity on what is considered tourism infrastructure and to create synergies between investors and regional objectives.

- Define the types and categories of projects to be considered as tourism infrastructure.
- Define a suitability methodology to ensure that the investments financed are in line with the region's tourism development process or with its objectives.

5.4.3 Financing and investment

Creation of opportunities and new financing mechanisms for managing investments in tourism infrastructure, recognizing potential investors, financiers, and tools that encourage tourism competitiveness in the regions.

The above is framed within the development of the following projects and actions:

5.4.3.1 Strengthening and improving the mechanisms for promoting investment in tourism infrastructure to increase project financing, encourage investment, and raise the statistics for the presentation and development of tourism infrastructure projects at the national level

- Develop a diagnosis of potential national, international, and private sources of financing for tourism infrastructure.
- Encourage coordination for financing the structuring of regional-level tourism infrastructure projects through the Banca de Desarrollo Territorial – FINDETER (Territorial Development Bank), Empresa Nacional Promotora del Desarrollo Territorial – ENTERRITORIO (National Promotion Agency for Territorial Development), Financiera de Desarrollo Nacional – FDN (National Development Financial Corporation), Banco Agrario de Colombia (Agrarian Bank of Colombia), and BANCOLDEX, among others.
- Provide support during the process of presenting projects to FONTUR.
- Encourage and support the presentation of projects through the General Royalties System.
- Create standard tourism infrastructure models to be presented by local and regional authorities.
- Leverage investment in infrastructure projects for tourism with financing sources such as PPPs.
- Identify investments that benefit from the tax incentive of the Growth Law and the new Law of Tourism.
- Diagnose investment behavior with the tax benefits granted by the government.
- Participate in the most important event in Colombia in terms of attracting foreign direct investment, the COLOMBIA INVESTMENT SUMMIT, to identify tourism infrastructure projects that will benefit destinations.
- Promote investments in hub airports to develop airport infrastructure (Class C aircraft).

5.4.3.2 Development and implementation of the new generation of infrastructure projects for tourism that encourage foreign investment and provide a broader vision of regional and national potentialities in tourism infrastructure that significantly impact Colombia’s competitiveness and development

- Complete an inventory of tourist destinations with foreign investment potential coordinated with the Regional Investment Promotion Agencies (APRIS).
- Establish criteria for developing, operating, and following up on Special Tourism Projects (foreign investment).
- Structure Special Tourism Projects
- Prioritize and structure projects related to the national nautical tourism plan.

5.4.3.3 Development of a strategy for monitoring operation of projects financed by FONTUR

- Follow up on completed investment projects that require operation by local and regional authorities.

5.4.4 Governance

This strategy aims to enhance the functionality of the term in a coordinated project called “Tourism as a guideline for the competitive development of the regions”—with coordination at the three levels of government (national, departmental, municipal) and peer-to-peer coordination at each level—by providing the regions with guidelines while striving to improve local populations’ quality of life and living conditions across destinations.

This strategy includes the following projects and their actions:

5.4.4.1 Tourism as a guideline for the competitive development of Colombia’s regions, from vertical governance scaling from the local to the national level.

- Develop support channels with local and regional authorities in order to identify investment initiatives.
- Provide technical support to regional and environmental authorities while developing tourism infrastructure projects.
- Build work agendas with Administration and Planning Regions, governors’ offices, and municipalities to strengthen the development and competitive management of the regions.



Cartagena de Indias. Photo: Unsplash, Roberto Nickson.

5.4.4.2 Tourism as a guideline for the competitive development of infrastructure for national tourism. Approach based on horizontal coordination and governance between national sectors

- Coordinate investments with the prioritized lines of investment in the different sectors that develop support infrastructure for tourism at the national level.
- Coordinate with the regional competitiveness commissions regarding investment needs in tourism infrastructure identified in the region.

5.4.5 Innovation

The innovation strategy includes two projects aimed at promoting the management of new innovative practices in tourism infrastructure, achieving the greatest interactive benefit from the tourist’s experience and the tourism sector in general.

The following projects and actions are presented below:

5.4.5.1 Implementation of innovative mechanisms to enhance the development of smart tourism infrastructures

- Develop a smart tourism signage handbook to promote and enhance the tourist’s experience.
- Create an information system for managing tourism infrastructure projects.
- Make information on tourism infrastructure projects available on the web page and update it frequently.
- Conduct a diagnosis of significant international experience in innovation-related topics.

5.4.5.2 Positioning of smart tourist destinations that incorporate elements of innovation in building and managing tourism infrastructure.

- Support the incorporation of infrastructure components in the strategy for smart tourism destinations and social innovation for the sector – Tourism Service Providers (PST, as per its Spanish acronym).
- Promote incentives to incorporate innovative components into tourism infrastructure projects.
- Support the development of infrastructure projects that incorporate innovative components and new technologies that contribute to improving regional competitiveness.

5.4.6 Sustainable tourism infrastructure

Develop tourism infrastructure that blends the sustainable interaction between economic, social, and environmental aspects within the project lifecycle to increase citizens’ quality of life, in keeping with the 2019-2022 NDP goals, the Sustainable Development Goals (SDGs), and public policies in this area. This is done through prosperous and healthy environments that contribute to the conservation and care of the environment, ecosystems, and biodiversity.

The above is framed within the development of the following projects and actions:

5.4.6.1 Design and strengthening of guidelines and requirements that define the development of sustainable infrastructure projects for tourism

- a. Define environmental criteria and guidelines for developing tourism infrastructure projects, without prejudice to the provisions of current environmental regulations.
- b. Develop programs for the promotion and inclusion of the following criteria: sustainability, accessibility, conservation, protection, promotion of traditional construction techniques inherent in traditional architecture, and adaptation to climate change and green businesses for the provision of tourism services.
- c. Coordinate with public and private, national and international entities to develop sustainable, responsible, and high-quality tourism infrastructure projects.

5.4.6.2 Encourage the implementation of sustainable infrastructure projects for tourism, attuned to the environment

- a. Create incentives for projects submitted to MinCIT (FONTUR) that incorporate sustainable infrastructure criteria and guidelines, considering the environment and the natural conditions of the regions.
- b. Support the development of sustainable infrastructure projects that correspond to and positively impact Colombia’s tourism destinations, contributing to coordination between social, economic, and environmental spheres.

5.5 Glossary

Development: used in the framework of sustainable development understood as “development that meets present needs without compromising the ability of future generations to meet their own needs” (World Commission on Environment and Development, 1987).

Governance: refers to the orderly and systematic way in which decisions are made by the stakeholders in the tourism sector (tourism service providers, individuals and legal persons as stakeholders, people in formal positions of power as representatives of institutions and entities). For the Governance Institute (2009), it also aims to encourage public and private projects, together with synergy from the local to the national level and vice versa.

Infrastructure: public works aimed at increasing society’s quality of life. Thanks to infrastructure, various economic and social activities are developed and able to function properly (Quesada, Renato, 2007).

Support infrastructure for tourism: public infrastructure that enhances or enables the tourist’s experience when arriving to a tourism destination and turns a tourist resource into an attraction.

Sustainable infrastructure: refers to “infrastructure projects that are planned, designed, constructed, operated, and decommissioned in a way that ensures economic and financial, social, environmental (including climate resilience), and institutional sustainability throughout the project lifecycle” (IDB, 2019).

Tourism infrastructure: services that are sold to tourists, created by a subsystem referred to as tourist facilities, which is made up of two elements: a) equipment and b) infrastructure (Boullón, 1985).

Green infrastructure: “strategically planned network of natural and semi-natural areas with other environmental features designed and managed to deliver a wide range of ecosystem services” (EC, 2013:3).

Tourism development process: the process of tourism development should be understood as a sequence of stages through which regions can obtain the expected benefits from this activity. Infrastructure is identified during the planning stage and must be managed to support the development of tourism destinations.

Project management: process of formulating, planning, managing, evaluating, and monitoring an action.

Integrated Management Strategy for Tourism Destinations – Tourism Corridors: the Directorate of Tourism Quality and Sustainable Development is developing the public-private coordination strategy “Integrated Management of Destinations – Tourism Corridors of Colombia,” whose main objectives are: 1) coordinate public-private actions to increase the competitiveness and innovation of the tourism sector in the regions; and 2) strategic promotion and marketing of Colombia as a tourism destination. Currently, there are 12 tourism corridors connecting Colombia’s 32 departments.

Recycling: a sustainability strategy to reduce the impact of architecture on the environment by striving to reuse existing infrastructures and limit construction in new areas (Martínez, M., 2012).

Competitiveness: the capacity of a tourist destination to enter the markets sustainably, through the coordination of public and private stakeholders and the creation of high-quality, innovative, and attractive differentiated products that create positive experiences and high added value for tourists and visitors. Therefore, destination competitiveness is built on the basis of strategic planning and management of comparative and competitive advantages in such a way as to enhance socioeconomic development and conserve both cultural and social resources, as well as the destination’s ecosystem services (Centro de Pensamiento Turístico – Colombia, 2019, p. 17).

Sustainability: development approach based on a long-term vision and synchronization between economic growth and conservation. It includes three spheres: environmental, sociocultural, and economic (NTS-TS 003, 2018, p. 9).

REGIONAL TOURISM DEVELOPMENT PROCESS



Figure 11. Regional Tourism Development Process
Source: MinCIT, Technical assistance in tourism planning

6. Guiding principles

Taking into account Article 2 of the General Law of Tourism, Law 300 of 1996, modified by Article 3 of Law 1558 of 2012, where the general principles guiding the development of the tourism industry are defined, for the development of this policy, the following will be recognized:

6.1 Agreement

By virtue of which, sector decisions and activities will be shared in agreements to assume responsibilities, efforts, and resources among the different agents involved, including the state and private sectors, at the national and international levels, in order to achieve shared objectives that benefit tourism. For this policy, and in order to align with the coordination guidelines, negotiation mechanisms must be created for the joint development of tourism infrastructure, based on the tourism development process and corresponding to the destinations' tourism objectives, prioritizing the most vulnerable regions.

6.2 Coordination

By virtue of which, the public entities in the tourism sector will act in a coordinated manner in the exercise of their functions. In order to promote Colombia's tourism competitiveness, we will work in coordination with other entities in the sector whose mission is to develop road, air, port, and river infrastructure, as well as with tourism associations, the private sector, academia, and other institutions that support new conditions to create sustainable infrastructure over time that responds to the regions' needs.

6.3 Planning

By virtue of which, tourism activities will be developed in accordance with the Tourism Sector Plan, which is part of the National Development Plan. In addition, it will be considered in the planning strategy, in accordance with each region's objectives and needs, in order to facilitate the sustainable development of tourism activities, always aiming for projects to respond to the sector's strategic vision.



Coffee Cultural Landscape.

7. Entities that will participate in policy implementation

National entities

• Vice Ministry of Tourism

The office, together with the Directorate of Tourism Quality and Sustainable Development, will join efforts to implement the guidelines and actions of the infrastructure policy as governing bodies of the national policy.

• DNP – Department of National Planning

It will support coordinated inter-institutional actions in terms of new knowledge for the area of tourism infrastructure, together with actions aimed at technical capacity.

• Ministry of Environment and Sustainable Development

It will support coordinated actions and relevant national policies under the principle of sustainability in infrastructure policy.

• Ministry of Culture

It will support the implementation of the infrastructure policy with respect to cultural elements considered part of Colombia's cultural heritage.

• Ministry of Transport

It will support the inclusion of the tourism agenda in transportation actions.

• ANI – National Infrastructure Agency

It will support infrastructure policy, including tourism as a factor in national infrastructure projects where tourism potential is relevant, and strengthen tourism through interventions in the regions that are part of the national agenda.

• PNN – National Parks

It will support the implementation of the infrastructure policy, with respect to sustainable elements in terms of technical capacity and project coordination.

• AEROCIVIL – Special Administrative Unit of the Colombian Civil Aviation Authority

It will support the infrastructure policy, including tourism as a factor in national infrastructure projects where tourism potential is relevant, and strengthen tourism through interventions in the regions that are part of the national agenda.

• INVIAS – National Roads Institute

It will support the infrastructure policy, including tourism as a factor in national infrastructure projects where tourism potential is relevant, and strengthen tourism through interventions in the regions that are part of the national agenda.

• CCO – Colombian Commission for the Ocean

It will support the infrastructure policy, including tourism as a factor in national infrastructure projects where tourism potential is relevant, and strengthen tourism through interventions in the regions that are part of the national agenda.

• DIMAR – General Maritime Directorate

It will support the infrastructure policy, including tourism as a factor in national infrastructure projects where tourism potential is relevant, and strengthen tourism through interventions in the regions that are part of the national agenda.

• FONTUR – National Tourism Fund

It will use technical capacity and institutional coordination to support the management of projects framed within the guidelines of the tourism infrastructure policy, along with the guidelines for monitoring and evaluating results for tourism infrastructure projects in Colombia.

• ProColombia

It will support the infrastructure policy while following the guidelines of international financing and investment for tourism infrastructure projects and new forms of international cooperation in order to promote large-scale projects with foreign investment in Colombia.

• Superior Tourism Council

It will support the infrastructure policy, including the needs and opportunities identified in the policy on the tourism sector's agenda in order to implement successful processes in Colombia.

Local and regional authorities

• Local and regional authorities

Understood as mayors' offices, governors' offices, and regional administrative and planning offices, who will be the main beneficiaries of the implementation of the infrastructure policy.

Other stakeholders

• Trade sectors

They will support the implementation of the infrastructure policy through actions aimed at inter-institutional and trade sector coordination in order to support the needs of tourism infrastructure in the tourism sector.

• Academia

They will support the implementation of the infrastructure policy by supporting the vision of knowledge laboratories and new practices in the construction of infrastructure projects from an architectural and urban planning standpoint, as well as identifying and carrying out a feasibility analysis of obsolete or disused public infrastructure that could be transformed into tourism infrastructure.

In addition to the above, the policy was submitted for public consultation on the Ministry of Trade, Industry, and Tourism's website from October 7 to October 21, 2020, in order to receive input from regional and national stakeholders interested in adopting a tourism infrastructure policy.



8. Executive summary

Table 6. Executive Summary Action Plan

SPECIFIC OBJECTIVE	STRATEGY	PROJECTS	ACTIONS
<ul style="list-style-type: none">▪ Increase technical capacity for managing tourism infrastructure projects.	1. TECHNICAL CAPACITY Specialize knowledge to improve efficiency, effectiveness, and efficacy while managing projects carried out by local and regional authorities and the Vice Ministry of Tourism in the area of Tourism Infrastructure	1.1 Toolkit for formulating and managing tourism infrastructure projects.	<p>1.1.1 Apply parameters to the formulation of tourism infrastructure projects, using the Adjusted General Methodology (MGA) of the Department of National Planning – DNP.</p> <p>1.1.2 Apply parameters to FONTUR's tourism infrastructure project phase with the phases established by the DNP.</p> <p>1.1.3 Prepare booklets with guidelines on development for local and regional authorities.</p>
		1.2 Technical advice on tourism infrastructure projects.	<p>1.2.1 Provide technical advice to local and regional authorities and other stakeholders on the development of tourism infrastructure projects in accordance with each region's objectives.</p> <p>1.2.2 Technical assistance workshops with the DNP on the MGA methodology, aimed at tourism infrastructure project formulators.</p> <p>1.2.3 Technical workshops for knowledge transfer and exchange of successful national and international experiences in tourism infrastructure (with academia, international institutions, private stakeholders, and national, regional, and local authorities)</p>

SPECIFIC OBJECTIVE	STRATEGY	PROJECTS	ACTIONS
		1.3 Quality management in the development cycle of tourism infrastructure projects with FONTUR.	<p>1.3.1 Apply parameters to processes for presenting, formulating, studying feasibility, and contracting of projects through FONTUR (feasibility, relevance, and adjustment forms)</p> <p>1.3.2 Analyze the need to update Colombian technical standards for tourism infrastructure.</p>
<ul style="list-style-type: none">▪ Implement tourism infrastructure planning strategies that respond to each region's tourism objectives and tourism sector needs.	2. STRATEGIC PLANNING Tourism infrastructure planning at the national and local levels in accordance with each region's objectives and needs in order to facilitate the sustainable development of tourism activities.	2.1 Diagnosis of tourism infrastructure needs	<p>2.1.1 Prepare an inventory of tourism infrastructure needs, which will contribute to establishing regional and local agendas for national tourism destinations.</p> <p>2.1.2 Identify infrastructure needs resulting from the studies in areas such as product design.</p> <p>2.1.3 Identify investment needs to be developed through public-private partnerships.</p> <p>2.1.4 Coordinate identification of opportunities and destinations for foreign investment (Portfolio of investment opportunities) with ProColombia's Investment Promotion Agencies.</p> <p>2.1.5 Identify prioritized investment initiatives in the different sectors that develop support infrastructure for tourism at the national level.</p> <p>2.1.6 Identify investment needs in tourism infrastructure in national parks and cultural heritage sites or historic centers, as well as initiatives to recycle obsolete or disused public infrastructure that can be reused as tourism infrastructure.</p>

SPECIFIC OBJECTIVE	STRATEGY	PROJECTS	ACTIONS
		2.2 Bank of tourism infrastructure projects.	<p>2.2.1 Create a bank of tourism infrastructure projects. (creation of institutional, methodological, legal, technical, financing, and management tools to guide the development of priority infrastructure projects for regional and national tourism development).</p> <p>2.2.2 Develop a project prioritization methodology for investment planning in tourism destinations (niches, tourism products, attractions, environmental characteristics, among others).</p> <p>2.2.3 Develop a methodology for monitoring the operation, maintenance, and sustainability of tourism infrastructure projects developed through FONTUR.</p>
		2.3 Types and categories of tourism infrastructure projects submitted to FONTUR.	<p>2.3.1 Define types and categories of projects to be considered as tourism infrastructure.</p> <p>2.3.2 Define a suitability methodology to ensure that the investments financed are in line with the region's tourism development process or its objectives.</p>
<ul style="list-style-type: none"> Facilitate financing mechanisms for investment in tourism infrastructure. 	<p>3. FINANCING AND INVESTMENT</p> <p>Create opportunities and new financing mechanisms for managing investment in tourism infrastructure, recognizing potential investors, financiers, and tools that promote tourism competitiveness in the regions.</p>	3.1 Strengthening and improving mechanisms to promote investment in tourism infrastructure.	<p>3.1.1 Develop a diagnosis of potential national, international, and private sources of financing for tourism infrastructure.</p> <p>3.1.2 Encourage coordination for financing the structuring of tourism infrastructure projects through the Banca de Desarrollo Territorial – FINDETER (Regional Development Bank), Empresa Nacional Promotora del Desarrollo Territorial – ENTERRITORIO (National Promotion Agency for Regional Development), Financiera de Desarrollo Nacional – FDN (National Development Financial Corporation), Banco Agrario de Colombia (Agrarian Bank of Colombia), and BANCOLDEX, among others.</p>

SPECIFIC OBJECTIVE	STRATEGY	PROJECTS	ACTIONS
			<p>3.1.3 Provide accompaniment during the process to present projects to FONTUR.</p> <p>3.1.4 Encourage and support the presentation of projects through the General Royalties System.</p> <p>3.1.5 Create standard tourism infrastructure models to be presented by local and regional authorities.</p> <p>3.1.6 Leverage investment in infrastructure projects for tourism with financing sources such as PPPs.</p> <p>3.1.7. Identify investments that benefit from the tax incentive of the Growth Law and the new Law of Tourism.</p> <p>3.1.8 Diagnose investment behavior with the tax benefits granted by the government.</p> <p>3.1.9 Participate in the most important event in Colombia in terms of attracting foreign direct investment, the COLOMBIA INVESTMENT SUMMIT, to identify tourism infrastructure projects that benefit the destinations.</p> <p>3.1.10 Promote investments in hub and regional airports to develop airport infrastructure (Class C aircraft).</p>
		3.2 Develop and implement the new generation of infrastructure projects for tourism.	<p>3.2.1 Complete an inventory of tourist destinations with foreign investment potential, coordinated with the Regional Investment Promotion Agencies (APRIS).</p> <p>3.2.2 Establish criteria for developing, operating, and following up on Special Tourism Projects (foreign investment).</p> <p>3.2.3 Structure Special Tourism Projects.</p> <p>3.2.4 Prioritize and structure projects related to the national nautical tourism plan.</p>

SPECIFIC OBJECTIVE	STRATEGY	PROJECTS	ACTIONS
		3.3 Follow-up strategy for project operation.	3.3.1 Follow up on completed investment projects that require operation by local and regional authorities.
<ul style="list-style-type: none"> Strengthen interinstitutional coordination to manage and develop support infrastructure for tourism. 	4. GOVERNANCE Strengthen the institutional framework for tourism, striving to improve local populations' quality of life and living conditions in the destinations.	4.1 Tourism as a guideline for the competitive development of Colombia's regions (Vertical Coordination).	4.1.1 Develop support channels with local and regional authorities in order to identify investment initiatives. 4.1.2 Provide technical support to local and regional authorities in the development of tourism infrastructure projects. 4.1.3 Build work agendas with regional administration and planning offices, governors' offices, and municipalities to reinforce the development and competitive management of Colombia's regions.
		4.2 Tourism as a guideline for the competitive development of infrastructure for domestic tourism (Horizontal Coordination).	4.2.1 Coordinate investments with the prioritized lines of investment in the different sectors that develop support infrastructure for tourism at the national level. 4.2.2 Coordinate with the regional competitiveness commissions on the needs for investment in tourism infrastructure identified in the region.
<ul style="list-style-type: none"> Promote innovative mechanisms for developing smart tourism 	5. INNOVATION Promote and implement ICT/GIS/SMART management mechanisms to develop and enhance sustainable tourism infrastructure projects.	5.1 Implementation of innovative mechanisms to strengthen the development of smart tourism infrastructures.	5.1.1 Develop a smart tourism signage handbook to promote and enhance the tourist experience. 5.1.2 Create an information system for managing tourism infrastructure projects. 5.1.3 Make information on infrastructure projects available online and update it frequently. 5.1.4 Conduct a diagnosis of significant international experiences in innovation-related topics.

SPECIFIC OBJECTIVE	STRATEGY	PROJECTS	ACTIONS
		5.2 Positioning of smart tourist destinations that incorporate elements of innovation in building and managing tourism infrastructure.	5.2.1 Support the incorporation of infrastructure components in the strategy for smart tourism destinations and social innovation for the sector – PST. 5.2.2 Promote incentives to incorporate innovative components in tourism infrastructure projects. 5.2.3 Support the development of infrastructure projects that incorporate innovative components and new technologies that contribute to improving the regions' competitiveness.
<ul style="list-style-type: none"> Implement actions to consolidate sustainable tourism infrastructure. 	6. SUSTAINABILITY More green tourism infrastructure attuned to the environment.	6.1 Reinforce the guidelines and requirements that define the development of sustainable infrastructure projects for tourism.	6.1.1 Define environmental criteria and guidelines for developing tourism infrastructure projects, without prejudice to the provisions of current environmental regulations. 6.1.2 Develop programs for the promotion and inclusion of sustainability criteria, accessibility, conservation, protection, promotion of traditional construction techniques inherent in traditional architecture, adaptation to climate change, and green businesses for the provision of tourism services. 6.1.3 Coordinate with national and international entities to develop sustainable, responsible, and high-quality tourism infrastructure projects.

SPECIFIC OBJECTIVE	STRATEGY	PROJECTS	ACTIONS
		6.2 Encourage the implementation of sustainable infrastructure projects for tourism attuned to the environment.	<div>6.2.1 Create incentives for projects submitted to MinCIT (FONTUR) to incorporate sustainable infrastructure criteria and guidelines, considering the environment and natural conditions of each region.</div> <div>6.2.2 Support the development of sustainable infrastructure projects that positively impact Colombia’s tourism destinations, contributing to coordination between the social, economic, and environmental spheres.</div>



Tatacoa Desert, Huila. Photo: Unsplash, Omar Nava.

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1. Previously, Decree 272 of 1957 authorized “the organization of Empresa Colombiana de Turismo, S.A.” Article 6 of this decree refers to infrastructure related to tourist facilities: “Authorize the government to transfer, as a capital contribution to Empresa Colombiana de Turismo, S.A., the hotels built or under construction and owned by Colombia, the movable assets or real estate for the construction of hotels (...).”

2. The functions related to infrastructure are the following paragraphs of this law: “b) Study, by areas, the infrastructure needs for tourism purposes and the measures to satisfy them, coordinating plans and projects with the following: 1. Public entities responsible for the planning or implementation of such works or services; 2. Regional tourism entities, currently existing or to be created under its direction or dependence; 3. Private entities interested in promoting or implementing tourism projects; 4. Official tourism entities of other countries. c) Promote and grant credits for tourism development; advise private investors interested in undertaking enterprises that promote tourism in Colombia and directly carry out works at tourism points of interest where the private sector has not done so. d) Promote the creation of villages, getaways, resorts, sports and recreation fields, and in general, all kinds of establishments intended for economic tourism. e) Build, promote, or manage, by itself or through concessionaires, works related to tourism.”

3. Article 7. The Tourism Development Certificate to be issued by the government for the purpose of increasing tourism is hereby created. The Tourism Development Certificates shall serve to pay, for their nominal value, all kinds of national taxes, shall be issued to the bearer, shall be freely negotiable, shall not accrue interest or enjoy tax exemptions, and shall constitute taxable income for their direct beneficiaries.

4. Article 8. Subject to the requirements established in the following articles, the government shall deliver, to investors in new hotels or lodging facilities or to those who substantially expand or improve existing ones, tourism development certificates in the amount of up to fifteen percent (15%) of the cost of the new investment, on a one-time basis and upon completion of the corresponding works.

5. Article 17. Stamp tax for social investment. The government may annually allocate the collection of the stamp tax created by section 2 paragraph d) last paragraph of article 14 of Law 2a of 1976; to develop, through the Ministry of Trade, Industry, and Tourism, social investment programs through tourism competitiveness projects for communities in vulnerable conditions, which include tourism infrastructure, and to make the corresponding budgetary appropriations for this purpose (underlined outside the text).

6. Law 1558 of 2012 “Whereby Law 300 of 1996 – the General Law of Tourism, Law 1101 of 2006, and other provisions are amended.”

7. Article 19. Procedure for accessing the resources of the National Tourism Investment Program. In order to be considered, all tourism infrastructure projects presented by local and regional authorities must be registered in the bank of tourism infrastructure projects no later than June 30 of each year. The selected projects will be included in the National Tourism Investment Program.

8. Whereby rules are issued to simplify, eliminate, and reform unnecessary formalities, processes, and procedures existing in the public administration.

9. Law 2010 of 2019 “Whereby rules are adopted for the promotion of economic growth, employment, investment, the strengthening of public finances, and the progressiveness, equity, and efficiency of the tax system, in accordance with the objectives on the matter that promoted Law 1943 of 2018, and other provisions are enacted.”

10. Decree 1155 of 2020 “Whereby Chapter 10 is added to Title 4 of Part 2 of Book 2 of Decree 1074 of 2015, Sole Regulatory Decree of the Trade, Industry, and Tourism Sector, and Article 264 of Law 1955 of 2019 is regulated, in relation to infrastructure for special tourism projects (PTEs).”

11. Law 2068 of 2020, “Whereby the General Law of Tourism is modified and other provisions are issued.”

12. Section 4.7, Article 3, Law 2068 of 2020.

13. Section 3, Article 53, Law 2068 of 2020.

14. Article 44, Law 2068 of 2020.

15. World Economic Forum, 2017, Travel and Tourism Competitiveness Report, http://www3.weforum.org/docs/WEF_TTCR_2017_web_0401.pdf

16. According to the Association of Spanish Air Transport Companies (2015), a hub is an airport where one or more airlines have established a connecting or distribution center for flights.

17. Boyacá, Coffee region, San Agustín and Tierradentro, Ecotourism, Santafé de Bogotá and surrounding area, Antioquia and border with Panama, Southwest and Santanders.

18. The CNT restored churches (San Ignacio and San Francisco), the Casa del Fundador in Tunja (Don Gonzalo Suárez Rendón), the Casa del Marqués de Valdehoyos and the Cuartel and Plaza de las Bóvedas in Cartagena; the Hostal Doña Manuela and the Casa Museo Bolivariano in Mompo; and the Casa de Mademe Agustine in Santa Marta (CNT, 1998 p. 65).

19. The CNT had 34 assets in 12 departments and Bogotá, including real estate (whole floors in buildings, lots, hotels, among others) and moveable assets (works of art, pre-Columbian and antique items) (CNT, 1998 p. 65-67).

20. List of properties declared to be of national cultural interest (MinCulture, 2019).

21. <https://fontur.com.co/corporativo/quienes-somos/9>

22. Law 99 of 1993 “Whereby the Ministry of Environment is created, the Public Sector in charge of managing and conserving the environment and renewable resources is reorganized, the National Environmental System (SINA, as per its Spanish acronym) is organized and other provisions are issued.

23. Law 99 of 1993, Article 14 “Functions of the Council. The National Environmental Council shall be in charge of the following functions.”

24. Law 99 of 1993, Article 31 “Functions. The Regional Autonomous Corporations shall exercise the following functions.

25. Decree 1076 of 2015 “Sole Regulatory Decree of the Environment and Sustainable Development Sector.”

26. Decree 1076 of 2015, chapter 3 environmental licenses.

27. Decree 1076 of 2015, chapter 5, Improvement activities in transportation infrastructure projects Article 2.2.2.2.5.1. The purpose of this chapter is to establish the list of improvement activities in transportation infrastructure projects, according to the studies prepared by the Ministries of Transportation and Environment and Sustainable Development, in coordination with the National Environmental Licensing Authority.

28. MinCIT, Office of Economic Studies, 2020.

29. According to (UNWTO – WTO), for the seventh consecutive year, total export earnings from international tourism grew faster than merchandise exports.

30. This pillar measures the extent to which a country offers sufficient air connectivity for travelers’ access to and from countries, as well as movement within many countries.

31. This pillar measures the availability of efficient and accessible transportation to major business centers and tourist attractions.

32. This pillar measures the availability and quality of key tourism services such as quality accommodation and car rental.

33. a) Poor coordination in planning and investment for territorial development. b) Poor coordination between planning for development and land use planning. c) Weak consolidation of the regional (intermediate) level of planning and management, and poor incentives for inter-regional cooperation.

34. Centro de Pensamiento Turístico (2019). Regional Tourism Competitiveness Index, p. 8.

35. Crouch, G.I. and Riotchie, J.R.B. (1999): “Tourism, competitiveness, and societal prosperity.”

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37. Roberto C. Boullon. (2006). “Planificación del espacio turístico” (Tourist area planning).

38. Pasanasiuk, A. (1997). “Tourism infrastructure as a determinant of regional development.”

39. Blanco. (2008), p. 18.

40. Covarrubias, R. (2015). “Evaluación del potencial en municipios turísticos a través de metodologías participativas” (Evaluation of the potential in tourist municipalities through participatory methodologies).

41. This infrastructure is measured by the World Economic Forum through the Travel and Tourism Competitiveness Index.

42. <https://fontur.com.co/consulta-de-proyectos/infraestructura/25/2>

43. DNP, Documento guía del modulo de capacitación en teoría de proyectos (Project Theory Training Module Guidelines), 2014.

44. International Market Research for the Americas Region, 2012, p. 17.

45. “El turismo en cifras” (Tourism in numbers), February 2020, Office of Economic Studies, MinCIT.

46. <https://fontur.com.co/consulta-de-proyectos/formatos-y-documentos/31/1>

47. https://fontur.com.co/aym_image/files/Requisitos%20Infraestructura.pdf

48. Guiding document for the virtual training module on Budgetary Management of Public Investment – DNP.

49. National Nautical Tourism Plan, MinCIT, 2013.

50. El Dorado International Airport Statistics – fourth quarter 2019 <https://opain-storage.ny3.digitaloceanspaces.com/docs/estadisticas-aeropuerto/2019/Consolidado-4-Trimestre-de-2019.pdf>

51. This process defines the direction and organizational structure in order to fulfill the policy objectives. It is the result of joint deliberation between the government and the various social, private, and political stakeholders in the public policy space (Aguilar, 2007, p. 8).

52. 2018-2022 Tourism Sector Plan, MinCIT, 2018, p. 11.

53. Increase in the number of 4G mobile internet connections, reaching 20.9 million connections, representing an increase of 8.1 million in the last two years (MinTIC, 2020). Similarly, MinTIC has worked on different projects to improve connectivity in remote areas of Colombia. For example, at the beginning of this year, it expanded the coverage of telephone and mobile internet in rural areas of the 32 departments in Colombia (MinTIC, 2020).

54. “Development approach based on a long-term vision and on the coordination between economic growth and conservation. It includes the three spheres: environmental, socio-cultural and economic” (NTS-TS 003, 3018, p. 9).

55. ICT (TIC, as per its Spanish acronym): Information and communication technology. GIS (SIG, as per its Spanish acronym): Geographic Information System.



