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# Boosting Civic Capacity: Using Socially Oriented Business Models in Community-based Tourism

**Abstract.** The potential of tourism to boost economic growth and social transformation is well researched and recognised by international organisations. Studies also show that the benefits derived from tourism are not spread equitably among local communities. As a result, there is growing doubt about tourism's actual contribution to accelerating sustainable economic, political and social development, particularly for the least privileged. To address this problem alternative forms of tourism have been implemented, such as Community Based Tourism (CBT), albeit with mixed results. The literature records the business sector's growing realisation that in order for companies to efficiently address sustainability challenges they need to develop new ways of creating, delivering, and capturing value. This paper seeks to contribute to the discourse on how to increase the impact of CBT. The author proposes using innovations from the Socially Oriented Business approach to design unique CBT models that address problems specific to a given locality.

**Keywords:** community-based tourism, corporate social responsibility, profit sharing partnerships, corporate social marketing, business models

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## 1. Introduction

The UNWTO (2023) data on tourist arrivals reinforced the important potential role of tourism in reducing poverty, rising equality and underpinning development efforts (Harrison & Pratt, 2019; Giampiccoli & Mtapuri, 2020b). While tourism can indeed bring tangible economic benefits (Chilufya et al., 2019), it often produces

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serious negative impacts on tourist destinations (Kuvan, 2010; Overton, 2019; Higgins-Desbiolles et al., 2019; Rahmawati et al. 2019; Gowreesunkar & Vo Thanh, 2020). It takes extra effort to facilitate equitable distribution of benefits derived from tourism (Dłużewska, 2019). Where most of the tourism sector is owned by private — often external — investors, inequality among local communities keeps growing and natural resources are being overused (Saayman & Giampiccoli, 2016). There is doubt whether international tourism has actually benefited local populations, especially those in developing countries (Ashley & Mitchell, 2010). For example, underpaid workers in Small Island Developing States continue to suffer from poverty and inequality (Giampiccoli et al., 2021; Guillaumont, 2010) and in some cases international tourism has even forced local populations to migrate (Abed & Hadi, 2023).

These challenges are reflected in sustainable development tourism policies (Hall, 2019), which increasingly recognise that sustainable tourism development is probably an unviable objective; the best we can hope for is to promote environmentally sound tourism development (Sharpley, 2020). There is a long list of positive and concrete actions that individuals and groups can do to reduce the negative footprint of human activities (Marchand & Walker, 2008).

## **2. Research Methods and Materials**

The purpose of this article is to demonstrate that CBT, as an alternative tourism model, can better facilitate community development when combined with socially-oriented business models. With this aim in mind, the authors investigate possible connections and interactions between CBT and implemented or just conceptualised socially oriented business models (SOB). Some of these models, such as Corporate Social Responsibility (CSR), Profit Sharing Partnerships (PSP), Corporate Social Marketing (CSM), Investment Redistributive Incentive Model (IRIM), Cooperatives (COOP), can be inserted, managed, and developed within existing CBT settings. The main part of the paper includes tables showing intersections between CBT and SOB and shows ways in which CBT can exploit specific SOB characteristics.

This conceptual study relies on insights from the existing literature on local communities, grassroots participation, local assets and skills, the engagement of external actors in community development, community ownership in the tourism value chain and CBT and SOB models. The review of the literature was undertaken to develop a conceptual framework for the ownership of the tourism value chain in local communities. In order to ensure that the framework is sufficiently robust to

fit specific local settings, care was taken to include studies concerning various locations around the globe, where specific solutions have been developed and tested.

### 3. Literature Review

According to Sachs et al. (2019), part of the reason progress towards sustainability has been rather slow are existing systems of provision and consumption. Social enterprises could change that by generating tangible social and economic benefits for individuals and communities (Wilkinson & Pickett, 2010) and scaling up social impacts at all levels to meet Sustainable Development Goals (Hudon & Huybrechts, 2017; Salustri, 2019; Tortia et al., 2020). In practice, social enterprises operate in areas where public, private and voluntary sectors overlap (Perrini & Vurro, 2006).

With the emergence of the social business model as a sustainable and innovative means to solve poverty and other social problems (Akter et al., 2020), efforts are made to develop a framework for capturing and optimising the value social enterprises can offer. By bridging the gap between for-profit and non-profit organizations and functioning like for-profit enterprises, SOB models set out to address world's ubiquitous socio-economic challenges. (Yunus, Moingeon, & Lehmann-Ortega, 2010; Wilson & Post, 2013). By employing SOB models businesses, institutional players, policy makers and, most of all, communities are better equipped to understand what they should do now and how to adapt and change their activities to create, capture, and disseminate value in the future. The SOB model can also be useful in driving processes that foster long-term commercially viable existence of tourism operations by adjusting to and driving multifaceted tourist behaviour (Dahles et al., 2020).

#### 3.1. Community-Based Tourism

The concept of community-based tourism (CBT), first piloted in the 1970s (Reid et al., 2004), is becoming an integral part of rural and tourism development strategies, particularly in the global South (Lane & Kastenholz, 2018). While numerous definitions of CBT have been proposed in the literature, none of them has gained general acceptance (Goodwin & Santilli, 2009). Broadly speaking, the term refers to tourism experiences that are owned and managed by local communities. Well-managed CBT creates jobs, generates income and protects the local environment (Giampiccoli et al., 2020). CBT is a mechanism designed to foster the delivery of the fruits of tourism directly to local communities in developing countries (Goodwin

& Santilli, 2009). Benefits of CBT include multi-purpose employment of resources, economic development potential of tourism revenues, diversification of the economy, creation of new ventures, preservation of living culture and nature, improved jobs and livelihood, and general empowerment of communities (Boonratana, 2010; Dolezal, 2011; López-Guzmán et al. 2011; Nair & Hamzah, 2015, Lo & Janta, 2020). In addition, CBT helps to inform and inspire travellers and promotes cross-cultural understanding. Current travel trends are closely aligned with CBT.

Additional value is provided by the openness of CBT processes to learning from and building on the successes or lessons learned from other mechanisms tested in diverse settings. These complementary processes can be supplemented by Corporate Social Responsibility (CSR), Profit Sharing Partnerships (PSP), Investment Redistribution Incentives Models (IRIM), Corporate Social Marketing (CSM) in tourism (Truong & Hall, 2019), which relies on business resources to launch and operationalise behaviour changing interventions aimed at improving environment, community well-being, public health and safety (Kotler et al., 2012), and common ownership of enterprises supplying goods and services to luxury travel operators.

The literature recognises the complexity of the CBT process (de Groot & Simons, 2015), the frequent divergence of the reality on the ground from the ideals and theory (Moscardo, 2008) and numerous limits operational, structural and cultural limits to community participation in the tourism development process (Tosun, 2000). The barriers to implementation of CBT on the ground may be grouped at three levels: policy, strategy and implementation (Cooper, 2004). The first level includes high-level policy challenges associated with attempts to absorb CBT by the prevailing neoliberal milieu (Saayman & Giampiccoli, 2016), government concessions and incentives, institutional frameworks. The second one refers to the process of making strategic decisions regarding the selection of appropriate approaches to project development (participatory, capacity building or simultaneous engagement of government, business. One barrier at this level is linked to financial viability (Dodds et al., 2018). Finally, barriers at the implementation level are to do with education, training and marketing.

While many problems associated with the practical application of CBT are legitimate, according to Mtapuri & Giampiccoli (2020), it is crucial to remember that they illustrate an application of a distorted view of CBT; properly understood CBT requires a holistic approach to development, which goes beyond narrow neoliberal thinking and its milieu. To address these challenges it is necessary to radically change the way people collaborate at the global and national level by creating alternative multi-lateral fora, developing a new paradigm of thinking about global issues, institutions and laws in a way that benefits local communities and fosters genuine collaboration between the government and local communities to balance

the influence of profit-oriented private investors (Giampiccoli, 2007). For the purpose of this article, CBT is defined as a type of tourism owned and controlled by local (especially disadvantaged) community members and for their own benefits, which is focused on redistribution and social justice (see Giampiccoli et al., 2021); a CBT enterprise (a community-based enterprise) is defined as a “community acting corporately as both entrepreneur and enterprise in pursuit of the common good” (Peredo & Chrisman, 2017, p. 157). Community-based enterprises “are owned, managed and governed *by the people* rather than by the government or a smaller group of individuals *on behalf* of the people. Members govern, rather than being governed” (Peredo & Chrisman, 2017, p. 158, emphasis in original). The next section presents examples of socially oriented business models that can be implemented in the context of CBT.

### 3.2. Corporate Social Responsibility

Solutions that combine CBT with best corporate social responsibility (CSR) practices have been warmly received (Han et al., 2020). CSR brings together a variety of stakeholders where dialog plays a vital function. These stakeholders are both benefactors as well as partners in developing and putting into action CSR projects for businesses (City Destinations Alliance, 2022). Giampiccoli & Mtapuri (2022) report that businesses in developed and in developing countries have accepted the CSR concept, but to be more effective, some aspect of CSR need to be legally binding instead of just being a voluntary action.

According to Achmad & Yulianah (2022), the main aim of CSR is the sustainable and responsible use of both natural and cultural resources by tourism businesses. CSR goals include efforts to minimize the effects of pollution and the creation of additional non-biodegradable waste, conserve natural landscapes, local biodiversity and cultural heritage (City Destinations Alliance, 2022). The European Commission defines CSR as “a concept whereby companies integrate social and environmental concerns in their business operations and in their interaction with their stakeholders on a voluntary basis”. CSR is part of the European Commission’s 2020 strategy for sustainable, smart and inclusive growth. A potential weak point of CSR is the voluntary nature of these self-regulation measures that exceed what is required by law (Blowfield & Frynas, 2005). Efforts to introduce formalization and certification are too often accompanied by weak sanctions in case of non-compliance (Gatti et al., 2019). Since 2023, some CSR reporting has become mandatory in EU member states, according to new rules of the European Sustainability Reporting Standards (Regulation 2023/2772) and Corporate Sustainability Reporting Directive (Directive 2019/904, 2019).

Another goal of CSR, partly driven by self-interest, is to ensure good treatment of workers, suppliers, guests and local communities, which are often made up of workers' families (Madanaguli et al., 2021). According to Hadj (2020), CSR also has the potential to promote the use of local products and services, strengthen the cooperation with local communities to improve their overall wellbeing and quality of livelihood and support fair trade practices.

While existing research stresses the close link between sustainability and CSR, the latter is essentially narrower in scope as it focuses on ways of doing business in such a way as to achieve economic, social and environmental sustainability. In other words, the primary goal of sustainability initiatives is to make money rather than dedicate resources to achieve the ultimate objective of indefinitely maintaining the viability of our economies and societies and the environment on which they depend (Jenkins, 2004). In contrast, CSR initiatives generally tend to focus on interventions addressing environmental challenges (Ibarnia et al., 2020).

### 3.3. Profit Sharing Partnerships (PSP)

Today corporations are expected to be good local and global citizens (Waddock, 2005). Talavera & Sanchis (2020) point out that while collaboration between organizations is a practice which dates back to the beginning of economic exchanges, it became strategically crucial in the context of environmental protection. Collaboration covers different types of interaction, such as the sharing of complementary competencies, co-power arrangements, the creation of fresh values, information sharing and common vision, interplay among co-equals, joint negotiation of shared objectives, joint planning, multi-organization processes and programmes, partnerships, and strategic alliances (Montiel-Overall, 2005).

While partnerships themselves are considered an essential component of a modern business strategy (Buckley et al., 2002), they are not always the optimum way to collaborate (Giesecke, 2012) and care needs to be taken to meet some critical conditions essential to their success (Kanter, 1994). Sometimes, they can take the form of corporate social responsibility (CSR) that reaches beyond mere philanthropy or compliance and integrates social goals into the core business strategy and operations (Del Baldo, 2013).

Partnerships are a major element of sustainable development by engaging stakeholders in decision-making processes regarding sustainability conditions (Koontz, 2006). Ordonez-Ponce et al. (2021) note that particularly large sustainability-focused cross-sector partnerships are effective vehicles for engaging a broad spectrum of societal actors in collaborative efforts to confront sustainability challenges both globally and locally. Examples of socially oriented part-

nerships for profit include public-private partnerships, social enterprises, and partnerships for CSR.

Partnerships are also a source of potential problems (see Daroń, 2017; Martinuzzi, 2023). For example, Parakash (2021) lists problems like instability of an enterprise caused by unsolved disputes between partners, which tend to be magnified when there is no formal partnership agreement or it does not cover the issue in question; or its dissolution when one of the partners decides to leave the arrangement.

### 3.4. Corporate Social Marketing

Corporate Social Marketing (CSM) is a set of actions in which traditional marketing principles and techniques are applied in campaigns and efforts to influence social action resulting in more robust health, improved safety, sustainable environment, strong communities and enhanced opportunities for securing financial prosperity (Lee & Kotler, 2015). CSM has been used to foster responsible tourism behaviour in various settings, e.g. to develop sustainable tourism (Gössling et al., 2008); to enhance sustainability of tourism practices (Dinan & Sargeant, 2000), to boost ethical consumption (Gössling & Hall, 2013), and in partnerships that bring together businesses and non-profit organizations or government agencies to tackle social issues (Edwards & Porter, 2023). According to Edwards & Porter, CSM differs from CSR, which they consider a broader term stressing businesses ethical behaviour and responsibly towards society.

There is a number of areas in the tourism industry where CSM has been used. Examples include demarketing (Hall & Wood, 2021) to discourage customers from engaging in some activities, like gambling, and encouraging them to do other things, like going on local, flight-free, holidays (Beeton & Pinge, 2003); visitor management (Beeton & Benfield, 2002) in national parks (Wearing & Schweinsberg, 2016). The most significant application of CSM has been to encourage tourists' environmentally friendly behaviours (Musgrave & Henderson, 2015) and responsible business practice of tour operators (George & Frey, 2010). CSM does not require actual corporate engagement; it can be delivered primarily by non-profit organisations (Truong & Hall, 2013).

However, Hall & Lew (2009) note that tourism practitioners continue to promote technological and management interventions with the goal of improving productivity instead of imposing meaningful restrictions on tourism expansion to deal with the problem of resource over-exploitation. Thus, CSM is not considered to be particularly effective in the tourist industry as it fails to address the fundamental challenge, which is the reduction in the overall amount of emissions (Gössling

& Peeters, 2015). The same is true of the reliance on green certification and eco-labelling, which is designed to promote more environmentally conscious consumer behaviour (Villarino & Font, 2015). Truong & Hall (2019) stress that while social marketing can indeed contribute significantly to fostering environmentally sustainable tourism, the mechanism works best when it is part and not a substitute of a comprehensive approach that embraces technological and regulatory measures to address climate change.

### 3.5. IRIM

Another possible strategic tool for more equitable wealth redistribution is the Investment Redistributive Incentive Model (IRIM) proposed by Giampiccoli & Mtapuri (2020b). The model holds special relevance for the tourism sector, especially when tourism enterprises are owned and controlled by foreign firms, which often results in substantial overuse of natural resource and the leakage effect, which can reach as much as 80 per cent (Wiranatha et al., 2017)

The IRIM can include both fiscal and non-fiscal incentives for businesses that support local ownership and employ management systems which facilitate redistribution. Under the IRIM, it is crucial that the incentives benefit the investor, the local government and communities, both individually and collectively; the IRIM is an integrated approach that seeks to secure local control of enterprises in a given geographic area (Giampiccoli & Mtapuri, 2020a). It is a new pathway to decrease inequality in the tourism sector (in as much as the IRIM can be applied to any economic sector).

However, as Bowles & Polania-Reyes (2009) note, economic incentives are unpredictable and there is a limit to what they can achieve. Thus, incentives within the IRIM must be carefully crafted so to achieve its redistributive objectives.

### 3.6. Cooperatives

A cooperative is a self-governed, voluntary association of people who work together to achieve their common goals, which can be economic, cultural, social or personal (UW Center for Cooperatives, 2024). A cooperative is owned by all its members through a democratically governed enterprise (International Cooperative Alliance, 2018). Feyers et al. (2019) describe multi-stakeholder cooperatives co-owned by participants, investors or non-profits. Aktürk and Demir (2021) note that according to the International Labor Organization (ILO), cooperatives based on self-help and mutual solidarity are well placed to offer a long-term solution to crisis-affected human communities.



The cooperative model holds special relevance for the tourism sector where, in addition to being a business, it also helps to build a viable and vibrant local environment where all cooperative owners can jointly establish an appealing and inviting habitat of experiences, activities and quality of life for themselves, the local community and the visitors. While global in scale and collaboration (Williams, 2016), cooperatives engaged in tourism focus on proving an authentic local experience rooted in local culture, life and places as well as local identity and narrative (Rasmussen et al., 2023). The cooperative model is an ideal solution for CBT, which also has sustainability in its broad sense as a fundamental value.

While cooperatives are not always successful and have their own challenges (see Nor & Amran, 2013; Mayank, n.d.), they have obvious advantages as socially oriented business models, including equal voting rights for all members and a focus on providing social benefits to members and communities (see NCBA CLUSA, 2022). According to Karakas (2019), another benefit of cooperatives is that they help to address social needs not met by traditional actors (the market or the state) by empowering their members, improving their well-being, skills, and self-reliance, nurturing social cohesion, solidarity, and trust among their members and the wider community. However, some communities perceive cooperatives more as a hobby and a way to spend free time than a serious alternative to traditional business organisations.

## 4. Results

The researchers propose a 4-step approach to developing a framework for community development based on an optimum mix of CBT and SOB models for a particular locality:

**Step 1:** through desktop research, identify group barriers to growth specific to the locality in question (for examples see below column 1 of Tables 1, 2 and 3);

**Step 2:** group the identified barriers into three broad categories: Policy, Strategy and Implementation (see Tables 1, 2 and 3);

**Step 3:** carry out consultations as to the best way of overcoming the problems (columns 2); and

**Step 4:** engage SOB experts in dialogue with CBT stakeholders to explore the application of tools developed by one of the SOB models to fortify the responses (column 3).

Researchers further postulate that, even if specific stakeholders elect not to employ any SOB mechanisms, familiarity with SOB models could in the future help

them find solutions suited to a particular CBT project/venture and locality, making the intervention potentially more effective.

A more detailed illustration of this 4-step approach is summarised in the four tables below. It should be emphasised that this approach is based on a preliminary analysis of specific CBT initiatives, opportunities and threats to their progress, and the degree to which stakeholders in a given setting are aware of SOB models that have already been implemented. Information listed in each column is based on previous research (Dodds et al., 2018; Ward et al., 2002; Cooper, 2004; Ngonya, 2015; Yanes et al., 2019; Dolezal & Novelli, 2020; Pham Hong et al., 2021; Dias et al., 2023; Roma, 2023). Tables 1–3 contain an overview of the *threats/barriers* grouped into three key areas: policy, development of strategy, and strategy implementation. Table 4 looks at ways to optimise opportunities.

Table 1. Policy: The bigger picture

Threats impeding the progress of CBT	Example of a potential remedy	Optimum SOBIM-inspired solution (Sample Suggestions Only)
No/insufficient government support	Implement advocacy and lobbying strategy. Convince politicians and government officials to consider targeted support for local communities	COOP: NGOs and large firms coordinate response for government engagement
Poor governance	Widen, create/ update and manage the implementation of updated rules, laws, strategies and regulations relevant to local communities.	IRIM+CSR+PSP: train key talent to participate in the drafting of laws, regulations and policies, and their practical implementation
Weak policies and regulations	Plan soft advocacy	CSM: deliver on soft advocacy ambitions
Insufficient capacity of direct local government officials	Offer training and development of local officials	IRIM+CSR: train and engage all stakeholders within the local community
Policy incompatible with CBT	Advocate and educate the local community	IRIM: invest in public education, law and political support
Legal and fiscal framework incompatible with CBT	Connect with international best practice	COOP: cooperate with international, national and local partners/ decision makers
Lack of ownership, lack of clarity as to ownerships or access rights to the sites (more powerful and better financed private operators step in)	Secure access rights and/or increased role in resource management	PSP+COOP: build experience, skills and widen the network
Power imbalance between corporations, local operators and general climate of economic liberalisation	Build a framework and a vision for national development within the private sector that the businesses can operate	COOP: explore approaches or components of a framework to nurture long-term collaboration between the private sector and communities CSR: support the development of legal frameworks that require management of the social impact of businesses
Natural environmental degradation and reduction in biodiversity.	Develop a sustainable use plan for the natural resources of their community.	CSR: train the people in sustainable practices and in non-harmful implementation
No/insufficient support of international organisations	Engage in international and global partnerships and a varied range of programmes.	COOP: engage with other partners/ parties in order to find solutions together

Threats impeding the progress of CBT	Example of a potential remedy	Optimum SOBM-inspired solution (Sample Suggestions Only)
No/insufficient support of international business	Explore ways to link up with international business on products and services, international cooperative movement and other non-commercial forms of collaboration.	PSP: engage in partnerships that would be willing to engage in knowledge and experience exchange

Source: Dodds et al., 2018; Ward et al., 2002; Cooper, 2004; Ngonya, 2015; Yanes et al., 2019; Dolezal & Novelli, 2020; Pham Hong et al., 2021; Dias et al., 2023; Roma, 2023

Table 1 shows that there are risks to CBT without government support. There is need for a strong lobby group to advocate for the involvement of the government as an authoritative overseer of relations between entities. Rules and regulations must be upheld by training key talents in a context of IRIM for greater results. The training must involve all stakeholders for a common goal. Cooperatives engender a sense of ownership and are crucial as a platform to build experience and nurture talent. Plans should be in place for sustainable use of natural requiring interventions framed in a CSR context.

Table 2. Strategy: the process of development

Threats impeding the progress of CBT. Critical Success Factors	Example of a potential remedy	Optimum SOBM-inspired solution (Sample Suggestions Only)
No/insufficient support of local community	Encourage local government to make policies and offer support that would benefit the tourism development within the local communities	COOP: work with other bodies to find solutions to all sort of matters beyond the capabilities of local communities
No/insufficient support of local business	Strengthen local marketing promotion	CSM: build and teach better implementation of marketing skills in practical use among local population
Insufficient capacity of direct CBT participants in preparing a robust strategy: Aims and Goals, SWOT, Functional Strategies (Finance, Supply Chain, HR, Sales, Ops, Manufacturing, Warehousing), Business Process, Technology, etc.	Engage in cooperatives or partnerships to reach the destine goals	PSP: negotiate possible partnerships or cooperations that would be willing to train local people in key functions when managing a business
No/weak collaboration between CBT stakeholders	Find a common goal and work towards it	PSP+COOP: build strong and trustworthy partnerships/ cooperation for project realisation and success
Poor infrastructure (e.g. accommodation, food, water, transport, road conditions)	Cooperate with firms and professional businesses that specialize in roadworks, modern transport, accommodation and other specialized sectors	CSR+COOP: give tools and teach necessary skills to local people that are needed for working positions within the tourism and support industry, as well as cooperate with specialized businesses
Poor training	Establish a system that would allow all members of the local community to continuously upgrade their competences, experience and qualifications in their chosen sector	CSR: train local community members to take up roles and positions in workplaces within the tourism sector and services

Threats impeding the progress of CBT. Critical Success Factors	Example of a potential remedy	Optimum SOBМ-inspired solution (Sample Suggestions Only)
Poor marketing and difficulties in developing products and services. Lack of funds to develop a comprehensive and cost effective marketing programs.	Develop and facilitate marketing arrangements sales desk, arrangements with taxi operators, preparation of materials)	CSM: supportive marketing programme
Poor service	Evaluate already existing service to find and identify what still needs improvement	IRIM: for evaluation of services and areas that still need improvement, such as increase the education quality for a higher chance of better future employment of the local community members.
Job/livelihood insecurity	Engage in cooperations to ensure secure and safe job positions and favourable employment conditions	PSP+COOP: engage in partnerships that are willing to train and employ people from local communities as their employees in various jobs as well as create a set of policies that would provide stable and secure livelihoods for both genders. IRIM: to develop safe and secure working conditions and workplaces for all members of the local community
Insufficient availability of workforce	Recruitment of local talent or invite (temporary) staff from outside	COOP: engage in international and national programs recruiting external and/or internal workforce encouraged by development possibilities, working conditions and realistic promotion
Lack of production space	Consider sharing production space	PSP: engage in partnership with people/industries with access or willing to provide access to the necessary production space, warehouses and machinery
Lack of raw materials	Improve cooperation with outside dealers if local communities have limited raw materials or are difficult to access	PSP+COOP: find partners and engage in partnerships that could supply the necessary goods, products and resources needed strongly for development, as well as set project complications. In return for long lasting cooperation between partners and shared profits
Poor perception of local CBT	Develop better sharing of access to information and news about CBT initiatives	CSM: to assist in professional marketing and efficient spread of information regarding CBT on all scales
Lack of interest in local CBT	Create and develop new activities and attractions to gain outside revenue and interests of local CBT initiatives	COOP: attract potential partners in order to spread the interest of local tourism initiatives
No/ limited access to credit	Develop new products and services	CSM: for product development, marketing and getting the final goods on the market
Communal landownership is not accepted as collateral.	Use marketing as a way to persuade the local government authorities of the importance of communal ownership of land	IRIM: build the skills to 'talk money' and set examples in taking the risks by lending money to CBT projects secured by communal property
Reserved attitude to CBT	Ask and invite the younger generation influencers to create a refreshed insight of CBT in the area	PSP+COOP: establish cooperations between all interested parties in getting a more beneficial standing of the attitude towards the CBT activities, projects and events.
Insufficient funding	Create a shared "communal" budget	IRIM: create opportunities for people to get fundings or engage in the idea of shared funds for their projects

Threats impeding the progress of CBT. Critical Success Factors	Example of a potential remedy	Optimum SOBM-inspired solution (Sample Suggestions Only)
Conflict over resources (raw materials, supplies, personnel, money etc.)	Encourage farmers to share some of their crops or products with locally run businesses Negotiate possibilities of a financial loan with the option of a low interest rate or repayment in instalments for small local businesses	COOP+CSR: train and improve gained qualifications by local personnel while cooperating with bigger training facilities or firms. Cooperate with local farmers and producers for sharing their products or resources IRIM: create policies on prioritize use of locally grown products and crops. Lent money at realistically low interest rate from banks or larger businesses that could support the development of local companies
Poor localisation	Advertise the location on social media, websites, newspapers and other platforms to ease the reach of visitors	CSM: promote the localisation of the local community by using modern up to date media networks
Existence of conflicting, competing local institutions	Create cooperation or partnerships for local enterprises to share both profits, experience, up's and down's and the constant training of their personnel	PSP+COOP: engage in partnerships/ cooperatives for profit and risk sharing operations.
Competition from industrial products	Promote locally made products as superior, better for the planet and environment, and as an alternative to products made by big manufactures	CSM: boost promotion of locally made products for financial benefits of the community
Presence of vibrant, diverse and competing conservation organisations	Engage in partnerships and cooperations that would help local communities to fight for their rights and identity	COOP: work with other organisations to make local communities stand out as important and visible figures
No diversification of potential tourism resources	Manufacture goods made from local products (in e.g. honey, bread, sweets, drinks, range of different alcohols etc.)	CSM: boost local promotion, product range and strengthen the marketing
No/insufficient product development	Engage in workshops on product development for all voluntary members of a local community	CSR: offer workshops and training on developing new products for all members of a local community
No/insufficient service development	Train the people in the latest customer service operations and etiquette.	CSR: training personnel from local communities

Source: Dodds et al., 2018; Ward et al., 2002; Cooper, 2004; Ngonya, 2015; Yanes et al., 2019; Dolezal & Novelli, 2020; Pham Hong et al., 2021; Dias et al., 2023; Roma, 2023

Table 2 shows that when the local community is slacking, cooperatives are ideal to address poor participation in CBT. Within the context of CSM, promotions and marketing should address cases of insufficient support to local businesses. CSM is also useful for enabling access to credit and for purposes of localization. Partnerships in the context of PSP are crucial to generate robust CBT strategies. PSP+COOP can be used to address weak collaborations between stakeholders that have a common goal as well as cases where there is a lack of raw materials.

Table 3. Implementation: the importance of education, training and marketing

Threats impeding the progress of CBT	Example of a potential remedy	Optimum SOBM-inspired solution (Sample Suggestions Only)
No/insufficient capacity to deliver key strategic goals	Collaborate with business and government on staff secondments	PSP + COOP: cooperate and share profits with business partners, collaborate with the government and all stakeholders, send staff/managers on secondments
Lack of management capacity in project administration and management, resource management, marketing and product development	Engage consultants/trainers and train the trainers (for larger programmes)	Training and technical assistance could be provided by collaborative partnerships. CSR: for project administration, management and training IRIM: management of impactful marketing campaigns
Lack of knowledge/awareness of local CBT	Create places where local people meet with guests and discuss about their ideas and activities	CSM: for marketing a sustainable tourism destination

Source: Dodds et al., 2018; Ward et al., 2002; Cooper, 2004; Ngonya, 2015; Yanes et al., 2019; Dolezal & Novelli, 2020; Pham Hong et al., 2021; Dias et al., 2023; Roma, 2023

Table 3 shows that collaborations are best cultivated in the context of PSP+COOP to enable the deliverance of key strategies. CSR is crucial to assist with training in project administration and management where these skills are lacking. CBT needs to be common knowledge at the local level — this requires the creation of such meeting spaces where these conversations are held to create awareness in the community.

Table 4. Opportunities

Opportunities of CBT (Critical Success Factors)	Optimise the opportunity	Optimum SOBM-inspired solution (Sample Suggestions Only)
Hospitality of local people	Promote the unique qualities of staying with local people (access to their daily routines, learn about their traditions, eat locally made products etc.)	CSM: create better marketing promotion to encourage a potential tourist to use their infrastructure rather than the rival, bigger players and enterprises
Strategic location	A location that can satisfy both the tourist and a locals looking for a good view, access to restaurants, shops and other tourist infrastructure and facilities	CSM + COOP: build stronger bonds with local business and stakeholders. Create better and more accessible transport connections for a more easy access to remote destinations for both the tourists and locals alike (both with private as well as public mode of transportation)
Positive attitude of CBT participants towards CBT	Widen the participation and cooperate with other outside businesses to invite more potential clients to support the development of the community.	PSP + COOP: widen the network of possible partners for business opportunities and higher profit making
Positive attitude of CBT stakeholders towards CBT	Promote destination as opened for sustainable business opportunities	CSM: widen business opportunities by strong advertising of destination
Strong potential of tourism resources	Build and develop sustainable tourism infrastructures	IRIM: develop more sustainable tourism infrastructures

Opportunities of CBT (Critical Success Factors)	Optimise the opportunity	Optimum SOBM-inspired solution (Sample Suggestions Only)
Existence of supporting local institutions (e.g. indigenous democratic systems, such as Gadaa used by the Oromos in Ethiopia and northern Kenya)	Boost the potential of the existence of such structures to promote, strengthen and monitor existing and future CBT projects	IRIM: reduce the cost of investing and improve collection of debt (failure to repay harms the whole community)
Presence of vibrant, diverse and supporting conservation organisations	Help to access the following: policies, advocacy & lobbying, legal advice, funds and business development, to projects and programs, as well as to the latest technology.	CSR: join forces with bigger, more influencing players to improve the functioning and development of the local community

Source: Dodds et al., 2018; Ward et al., 2002; Cooper, 2004; Ngonya, 2015; Yanes et al., 2019; Dolezal & Novelli, 2020; Pham Hong et al., 2021; Dias et al., 2023; Roma, 2023

Table 4 shows that in order to exploit the available opportunities, CSM can be used to capitalise on the hospitality of local people to benefit local tourism by promoting the importance of homestays to learn local cultures. IRIM is crucial to support local tourism through conservation initiatives and programmes.

## 5. Discussion

To reiterate, the researchers propose the following a 4-step process that will enhance the CBT model by the inclusion of SOBM.:

1. Analyze threats and opportunities associated with specific CBT projects.
2. Define the nature and level of the problem or opportunity in terms of policy, strategy and implementation.
3. Propose plausible ways/remedies to address the problem or enhance the opportunity.
4. Reflect on the benefits of SOB mechanisms that can be used in order to enhance and optimize the CBT initiative.

The key issue is to account for the availability and openness of appropriate SOB models to explore collaboration with a CBT initiative. Tables 1–3 present threats faced by local communities engaged in CBT practices at three stages: policy planning; development strategy, and its implementation.

The ‘policy’ stage refers to the sum of direct and direct activities undertaken by the government at all levels associated with the public policy process that affects CBT. It can include issues such as enabling laws and regulations, and activities aimed at addressing relevant economic and social problems (Lassance, 2020). The policy process involves different actors, like politicians, NGOs, international agen-

cies, academics (Hill & Varone, 2021). Following Harold (1956) and Håkansson & Snehota (1989), in this paper a strategy is understood as a pattern of activities which has an impact on the achievement of organizational goals in relation to its environment. In this way, strategy management involves managing the process of **strategy development** (formulating the pattern of activities to be carried out), while **strategy implementation** (finding ways to ensure that these activities are actually carried out) focuses on talent and marketing (Olson et al., 2018).

Thus, **Tables 1–3** present threats impeding the progress of CBT (column 1), preliminary suggestions of potential remedies (column 2) and proposals of SOBМ-inspired solutions (column 3). The same approach is used in **Table 4**, which includes examples of opportunities associated with CBT initiatives, in other words, ideas about how to strengthen existing positive factors. The columns in **Table 4** present CBT opportunities (Critical Success Factors); suggestions on how to optimize these opportunities, and suggestions regarding optimum SOBМ-inspired solutions.

For example, some of the barriers listed **Table 1** include legal aspects, issues related to the government and its relationship with local communities involved in CBT initiatives and activities. Top of the list of 11 problem areas in **Table 1** is “**No/insufficient government support**”. CBT initiatives need government support in many areas (see Armstrong, 2012; Goodwin, 2007; Scheyvens, 2003; Ullah & Kim, 2020) for example to assist with market research and marketing via national tourism bodies (UNWTO, 2004).

The table contains three possible solutions to address this challenge: i) implement advocacy and lobbying strategies; ii) convince politicians and government officials to consider targeted support for local communities, and iii) engage in a cooperation with firms and NGOs (to boost advocacy/lobbying). As for the best SOB model, Manyara & Jones (2007) suggest joining a PSP (Profit Sharing Partnership) or a Cooperative. This would allow the local community to join forces with an NGO or a large firm to show and convince the government that they can bring something to the table and thus persuade the government to support them. In turn, IRIM could be used to work on finance-related approaches, including incentives.

Another example is taken from **Table 2**, which focuses on challenges specifically related to local communities. The table presents 26 problem areas together with possible solutions. One of the threats is “**Job/livelihood insecurity**”. The goal is to enable community members to fully engage in a CBT project so that they do not need to worry about how they can get a better job to sustain themselves and their families. Three solutions to this challenge are proposed: i) create a set of policies that would provide stable and secure livelihoods for both genders and members of the community; ii) join in a partnership to ensure secure, safe job positions; and iii) increase the education quality for a higher chance of better future employment



of the local community members. Three SOB models could help to overcome this challenge: use PSPs and cooperatives to engage in partnerships that are willing to train and employ people from local communities as their employees in various jobs; and use IRIM to develop safe and secure working conditions and workplaces for all members of the local community.

The third example comes from Table 3. The threat in question is the **lack of management capacity in project administration and management, resource management, and marketing and product development**. As noted by Giampiccoli & Mtapuri (2012), failure to assure proper project implementation could inflict serious “damage on communities instead of serving as a development tool for which it is intended”. Armstrong (2012) points out that the ability of local management, their accountability and transparency is one of the determinants of CBT projects’ success or failure. The literature on CBT highlights numerous critical management tasks or success factors, such as networking, book-keeping and fair distribution of revenue, tapping into suitable type of credit, and manage impactful marketing campaigns (McGehee & Kline, 2008; Dixey, 2012; UNWTO, 2004; Townsend, 2006; Dodds et al., 2018).

According to Townsend (2006), an average CBT initiative needs about 5 years to develop an effective organisational and management structure and capacity. To address this issue, the Townsend offers six immediate solutions: i) recruit (temporary) staff from outside; ii) engage consultants/trainers; iii) train the trainers (for larger programs); iv) collaborate with business and government on staff secondments; v) offer workshops; vi) send staff/managers on secondments. Examples of selected SOB models that could help to optimize these responses include i) training and technical assistance provided by collaborative partnerships; ii) CSR — for project administration and management; iii) IRIM and iv) Cooperatives — for resource management; v) CSM — for marketing and product development (Pandey, 2011; Stone & Stone, 2020; Dahles et al., 2020).

**Table 4 presents ways of optimizing seven opportunities associated with CBT projects.** Making transport more accessible and easier to get to destination for tourists and locals alike (both with private as well as public mode of transportation) is **key to successful CBT development. It is also an intervention that calls for a complex support network and** assistance from public authorities, commercial firms, private funders, NGOs and even universities to ensure proper planning and implementation of activities (López-Guzmán et al., 2011). To support this process, CBT can implement such SOB models as CSM and Cooperatives — for stronger bonds with local business and stakeholders that will in the long-term facilitate (Dolezal & Novelli, 2022).

## 6. Conclusion

The study presented in the article is an attempt to take advantage of the considerable potential of existing SOB models to boost the effectiveness of CBT projects. Rather than inventing something new, the goal was to highlight possible areas where interactions between CBT and SOB models could be beneficial.

It can be concluded that the main goal of the majority of CBT interventions is to build capacity, for example regarding transport, which is essential to improving tourist mobility. Another conclusion is that government support is indispensable for the success of CGT projects.

Strategies described above are designed to assist tourism planners in transforming tourism into a more just and sustainable sector. This requires a shift in mentality and a reframing of SOB and tourism outside the current neoliberal milieu. This shift could be facilitated by new approaches to CBT at the stage of policy, strategy development and strategy implementation. As shown in the article, the effectiveness of these approaches could be enhanced by new forms of partnerships and collaborations with traditional and emerging SOB models and volunteer inspired forms of CSR.

### CRedit Authorship Contribution Statement

**Michael Kemp:** Investigation, Resources, Visualization, Writing — original draft, Writing — review & editing. **Andrea Giampiccoli:** Conceptualization, Investigation, Methodology, Supervision, Visualization, Writing — review & editing. **Anna Dłużewska:** Supervision, Formal Analysis, Validation, Writing — review & editing.

### Declaration of Competing Interest

None.

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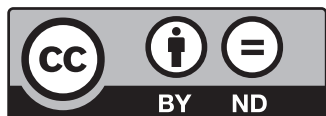


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## Zwiększanie potencjału społeczności lokalnych: Wykorzystanie społecznie zorientowanych modeli biznesowych w turystyce opartej na społecznościach lokalnych

**Streszczenie.** Potencjał turystyki, jeśli chodzi o generowanie wzrostu gospodarczego i wspieranie transformacji społecznej, jest dobrze zbadany i uznany przez organizacje międzynarodowe. Badania pokazują również, że korzyści płynące z turystyki nie są równomiernie rozłożone wśród lokalnych społeczności. W rezultacie kwestionuje się rzeczywisty wkład turystyki w przyspieszenie zrównoważonego rozwoju gospodarczego, politycznego i społecznego, szczególnie w przypadku grup najmniej uprzywilejowanych. W odpowiedzi na ten problem powstały alternatywne formy turystyki, takie jak turystyka oparta na społecznościach lokalnych (CBT), choć ich rezultaty są niejednoznaczne. Literatura wskazuje na rosnącą świadomość sektora biznesowego, że aby sprostać wyzwaniom zrównoważonego rozwoju przedsiębiorstwa potrzeba nowych sposobów tworzenia, dostarczania i przechwytywania wartości. Niniejszy artykuł stanowi wkład do dyskusji na temat sposobów zwiększania wpływu CBT. Autorzy proponują wykorzystanie innowacji wypracowanych w ramach podejścia określanego jako biznes zorientowany społecznie w celu stworzenia modeli CBT, które odnoszą się do konkretnych problemów danej lokalizacji.

**Słowa kluczowe:** turystyka oparta na społecznościach lokalnych, społeczna odpowiedzialność biznesu, partnerstwa w zakresie podziału zysków, marketing społeczny przedsiębiorstw, modele biznesowe



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