

The results of the National Tourism Development Strategy Assessments - 2012

(I) The assessment tool

In 2012 the Sustainable Tourism Working Group of the CEEweb for Biodiversity prepared a guidance for decision makers on policy development of sustainable tourism – the assessment methodology for NTDS in Central and Eastern Europe. The criteria of the tourism strategy assessments were elaborated in light of the EU biodiversity policies (EU Biodiversity Strategy to 2020) and the Agenda 21 for a Sustainable and Competitive European Tourism.

Methodology of assessment is based on analysis of weighted assessment and review of major tourism sustainability indicators for a tourism strategy. The methodology provides 132 criteria which are divided into 7 thematic fields:

1. Description of the document and elaboration process,
2. Situation analysis and programming,
3. The grade of enhancement on sustainable approach to tourism in policies,
4. Participation of institutions in tourism management,
5. Sustainable development of tourism businesses, supply of services and special enhancement addressing nature protected areas,
6. Tourism strategy measures,
7. Financing and implementation of the National Tourism Strategy.

(II) Assessed documents

There were 6 documents assessed in 5 countries of the region:

- (I) **Bulgaria** National Strategy for Sustainable Tourism Development (2009 - 2013);
- (II) Strategy of Tourism Sustainable Development in the Republic of **Moldova** (2003-2015);
- (III) Directions for Tourism Development until 2015 (**Poland**).
- (IV) Master Plan for National Tourism Development in **Romania** (2007 – 2026);
- (V) **Ukraine** State Programme of Tourism Development for 2002-2010;
- (VI) **Ivano-Frankivsk** Regional Target Program of Development of Tourism in the region in 2011-2015 (Ukraine).

The Table 1. presents the fulfilment of each criteria in every analysed document. The result expressed in percentage should be regarded only as a guidance, always together with the detailed remarks presented in each assessment.

In general overview the research shows that:

- a) tourism strategy measures and financing and implementation of the National Tourism Strategy are the weakest points in all strategies (only Bulgaria received very good score for the implemented strategy measures),
- b) although the NTDS may need strong reviewing, regional tourism strategies may fulfil the sustainability criteria quite well (Ukraine study case),
- c) Bulgarian document aims at the best study case according to the assessment.

The best developed parts of the documents are marked as the highest scores received (Table 1.) in grey boxes.

Table 1. Fulfilment of assessment criteria in analysed national documents (in %).

Document / Thematic field	Bulgaria	Moldova	Poland	Romania	Ukraine	Ivano-Frankivsk
Description and elaboration process	75	43	60	47	41	49
Situation analysis and programming	94	37	71	45	18	82
Sustainable approach to tourism in policies	81	71	58	20	52	67
Participation of institutions in tourism management	95	56	78	69	80	80
Business, supply and PAs	83	27	70	17	43	57
Strategy measures	83	32	19	59	6	63
Financing and implementation	68	43	75	46	11	64

Source: Assessments of 5 National Tourism Development Strategies (2012).

(III) Lessons learnt and outlook

Each analysed country have own strategy and view on tourism development but the way they implement and elaborate tourism policy differs significantly. Usually they develop National Development Plan, Tourism Strategy and Operational Plan. In particular the assessments review indicated the following directions for improvement of NTDS in the countries:

Bulgaria

- a) the operational measures of the existing strategy (2007 -2013) should be clearer and better defined;
- b) the new strategy (2014 - 2020) should include clearly defined guidance on how to involve the local communities in protecting biodiversity and securing it as a basis of sustainable tourism development; detailed and clear description about the possible social benefits and community profits; long-term analysis of the expected benefits of proper management of natural resources and their impact on sustainable development, indicators for effectiveness of resource management.

Moldova

- a) strategy should include strategic directions of development for regional and local tourism;
- b) strategy should take into consideration the environmental protection system and role of ecotourism in maintaining all kind of protected areas in the country;
- c) strategy should give more specific actions in strategic directions for tourism development of different areas;
- d) it is necessary to increase monitoring indicators for successful implementation;
- e) it is necessary to elaborate at national level a mechanism for enhancing the implementation of sustainable practices in tourism;
- f) it is necessary to establish concrete responsibilities for other ministries, regional authorities, NGOs, for the strategy implementation.

Poland

- a) the sectorial long-term vision strategy (more than 5 years, preferably 10 with necessary updates) should describe the variety of tourism development of the country with all type of financing sources taken into account, financing of the tasks should be connected to diversity of sources and the cooperation of different ministries; institutions (for example of environmental protection) in strategic planning should be more visible;
- b) it is necessary to recognize other fields where tourism may be complementary to the development of these sectors of economy, social and environmental aspects;
- c) in order to be available for all stakeholders there should be a short, 60-80 pages of easy-to read version of the document prepared;
- d) the tourism resources and market analysis for national tourism development should include natural resources presented from the point of view of ecosystem services;
- e) national tourism marketing need to include more offer of touristic regions and territorial partnerships next to the offer of administrative regions;
- f) the realization of the *Directions...* should not be only evaluated on tourism participation in the country GDP but based on selected indicators in the framework of natural, economic and social conditions of the Polish territory, there is a lack of proper sustainable tourism development indicators for the strategy evaluation and monitoring of its impact on economy, society and environment.

Romania

- a) the tourism strategy should be available in a maximum 100 pages easy to read version, or at least a summary should be published in Romanian and English as well;
- b) sustainable development of tourism should be a real priority supported with clear goals, expected results, really consistent actions and monitoring, the consistent chapter on biodiversity conservation and sustainable landscapes should be included in the Tourism Master Plan;
- c) the green infrastructure concept needs to be introduced in the tourism strategy, more protected areas don't necessary mean more sustainable land use as even ecotourism activities may threaten the highly evaluated natural sites, if not carefully managed;
- d) the conservation of biodiversity and associated ecosystem services should be extended from protected areas to all areas where tourism activities take place, by implementing coherent actions across all policies that influence tourism field;
- e) carefully prepared consultation process with involvement of NGOs and local authorities;
- f) the Master Plan should be correlated with all strategic complementary documents formulated afterwards to capture all relevant sustainability issues and it should be updated with distinct chapters providing goals and actions for every related fields;
- g) infrastructure development should take into account nature heritage conservation;
- h) the Master Plan should be aligned with all sustainable tourism agreements, conventions, protocols, EU policy towards development of sustainable tourism and nature conservation;
- i) the strategy should support creation of Destination Management Organization rather than Marketing Organizations;

- j) the Master Plan should support the implementation of green certification and labelling systems (using environmental criteria) for the entire tourism field (for example the Progressive Green Labelling System), not only for ecotourism destinations;
- k) consistent educational programs for tourist staff should be encouraged and supported in the strategy;
- l) the legislation regarding energy efficiency and water management needs improvements as well as simplification of procedures, the “Green House” program should also continue;
- m) national and regional tourism development and marketing plans should be updated including SEA, EIA and EA for developing tourism infrastructure, not only in protected areas, but in all areas;
- n) developing financial mechanisms for the tourism sector's contribution to biodiversity conservation and landscape is needed;
- o) a financing program for local businesses respecting sustainability criteria needs to be adopted;
- p) monitoring and evaluation should be a priority, specific actions should be fixed and the outcomes made public; given the bad state of natural environment, the Implementation Group should meet every week to analyse the strategy implementation progress;
- q) an update of the MP after 5 years since the elaboration is needed.

Ukraine

- a) the strategy should bind formation of structural units of tourism within the regional administrations aimed at establishing an effective management system that would have enhanced the development of the tourism industry with efficient use of natural and recreational potential and cultural heritage of the region;
- b) targeted programs for tourism development at the regional level, the strategy of tourism development and the development of specific measures to achieve the strategic goal should be the main direction of the mechanism of regional management, tourism development; regional agency or unit for marketing and promotion of tourism is necessary;
- c) State Agency of Tourism and Sanatoriums had initiated some changes to the Law of Ukraine “About Tourism”, which were considered (according to opinion of the Tourist Association of Ukraine) as steps to monopolization of some branches of tourism; changes include positions on cancellation of tour operator licensing and implementing alternative state control mechanism – which consists of the state register of tourist activities and associations, state control on the activity of non-government tourist associations by state authority on tourism, etc.
- d) support of the tourist operators who is more active in inbound tourism in the way of decreasing of some taxes, donation for advertisement for attraction of foreign tourists to the country etc. in order to enhance both inbound and outbound tourism equally;
- e) because of the lack of some privileges at the state level, sufficient conditions cannot be created for increasing investment, including foreign development of tourism industry;
- f) there seem to be three basic directions of state support: creation of favourable investment climate for attraction of capital to the tourism industry, which may include some tax incentives, development of transport infrastructure (e.g. air service in Ukraine is practically in the hands of monopolists who dictate the price of tickets, and

are actually rather non-competitive, it is necessary to create favourable conditions for the arrival of domestic and foreign air carriers and opening new routes) and a clear and consistently funded program to promote tourism and recreation potential of Ukraine, both within the country and abroad (the action image program is unaddressed and therefore ineffective);

- g) quality of provided goods and services, and appropriateness of their prices to the solvency of the consumers are important; hotel industry classification is defined by the stars, categories, while the tourist business categorization does not exist; only the advertising or opinion of other consumers who use the services of this company is the guaranty for reliability of tour operators but many tourist enterprises focus on promotional activities, using PR-technologies, rather than seeking to improve service quality.

The general recommendations of experts for improvement of each strategy focus mainly on: operational measures of existing strategies, monitoring of the strategy implementation, functioning of the tourism business and nature protected areas in tourism national planning as well as enhancing the cooperation between authorities and institutions from different sectors and brands in tourism sustainable development.

Resources

National and local authorities, PAs authorities, NGOs and other institutions may find more information about the research on the CEEweb website:

- a) Upgraded version of the Assessment Criteria for National Tourism Development Strategies:

<http://www.ceeweb.org/work-areas/working-groups/sustainable-tourism/activities/>

- b) Assessed five selected national tourism strategies (Bulgaria, Moldova, Poland, Rumania and Ukraine:

<http://www.ceeweb.org/5285/assessing-national-toursim-strategies-in-cee/>

<http://www.ceeweb.org/work-areas/working-groups/sustainable-tourism/resources/>