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The results of the National Tourism Development Strategies Assessments - 2013

(I) The assessment tool

In 2012 the Sustainable Tourism Working Group of the CEEweb for Biodiversity prepared guidance for decision makers on policy development of sustainable tourism – the assessment methodology for NTDS in Central and Easter 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 criterions that 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 5 documents assessed in 4 countries of the region:

- (I) The State Tourism Policy Concept in the Czech Republic for the period of 2014 – 2020;
- (II) National Tourism Development Strategy of Hungary (2005 – 2013);
- (III) Tourism Development Strategy of the Republic of Serbia (2006 – 2015);
- (IV) National Rural Tourism Master Plan 2011 (Serbia);
- (V) The strategy of the tourism development until 2020 (Slovakia).

Also a review of the Assessment of the Polish National Tourism Strategy was carried out to provide updated information on tourism development in Poland.

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

In general overview the research shows that:

- a) all strategies strongly refer to sustainability however lack concrete steps for its ensuring,
- b) the weakest points of the tourism strategies are their targets, financing and monitoring,



c) Serbian National Rural Tourism Master Plan achieved the best results according to the assessment criteria.

Table 1. Fulfillment of assessment criteria in analyzed national documents (in %).

Document/ Thematic Field	Czech Republic	Hungary	Serbia Tourism Development Strategy	Serbia National Rural Tourism Master Plan	Slovakia
Description and elaboration process	72	58	54	63	65
Situation analysis and programming	66	54	54	69	46
Sustainable approach to tourism policies	91	98	61	82	80
Participation of institutions in tourism management	89	73	62	95	95
Business, supply and PAs	60	30	3	37	57
Strategy measures	0	0	33	54	6
Financing and implementation	18	46	25	32	14

Source: Assessments of National Tourism Development Strategies (2013).

(III) Lessons learnt and outlook

Each analyzed country has its own strategy based on current trends in their area and national development. They take into account the international agreements however their priorities differ. All assessed countries have a tourism strategy or a master plan in which they outline the goals and visions but indicate an action or operational plan needs to be created for further steps.

In regards to the improvement of the documents, the following directions were suggested:

Czech Republic

- overall, the Czech Tourism Concept contains objectives that are aimed to sustainable tourism development however lacks description of concrete steps ensuring their fulfillment.
- need to further emphasize sustainability in the description of priorities
- in comparison to the analytical part that contained multiple statistics and tables, the actual concept was missing factual data and indicators that want to be achieved.
- chapter on Implementation and Monitoring should be elaborated in more details with indication of funding opportunities.
- important to set targets, criteria and deadlines for monitoring, as it is necessary to ensure successful implementation of the strategy.

Hungary

- generally, we can say that the strategy contains some objectives in the benefit of the sustainability, with some concrete duties and goals, but as the assessment was made in the last year of the strategy period, the conclusion is that these were declarative phrases rather than implemented tasks;
- the strategy document has more then 200 pages, which is more then people usually prefer to read (especially for the stakeholder consultation);



- too many statistics with less importance from the strategy point of view (ex. average of living at the birth time within the EU countries);
- the financing of the duties was not specified in the document at all, probably this is one reason why a lot of tasks couldn't be achieved.

National Tourism Development Strategy

- operative plan for government actions and agendas must be included;
- the new Strategy should be based on the principles of sustainable tourism;
- the new national Strategy should set out clear vision, goals, objectives, operational measures, indicators and outcomes of national sustainable tourism policy that contribute to improving nature protection and meeting EU standards;
- specify linkage of sustainable tourism to other sectors and their management documents/policies (environmental policy, agriculture and forestry, regional and rural development policy, transport policy, health policy, employment policy);
- strategy formulation process should include all stakeholders and should recognize their active role in destination management;
- the new Strategy should include tourism resources and market analysis from the point of view of ecosystem services;
- further improvements are needed in the field destination marketing and benchmarking (product, strategic);
- Clarify participation of local communities and benefits for them in case of tourism development. Furthermore, it is necessary to emphasize the importance of local tourism bodies who would be responsible for a tourism destination;
- It should be clarified the role of local governments, ngos, protected area authorities, environmental institutions, etc. In the implementation of the Strategy;
- The plan for evaluation and monitoring should be detailed, with information who will conduct monitoring research and where from data will be collected;
- Specify the indicators for the Strategy implementation achievements.

National Rural Tourism Master Plan

- There should be a short, easy-to read version of the document prepared;
- The plan for evaluation and monitoring should be detailed, with information who will conduct monitoring research and where from data will be collected;
- The proper sustainable tourism development indicators should be listed for monitoring research;
- Specify the indicators for the Master Plan implementation achievements;
- Indicate details of impact of tourism on natural resources and ecosystem services;
- Specify measures to protect biodiversity and habitats at national and local level;
- Indicate the importance of protecting the natural diversity (biodiversity, geodiversity, landscape diversity) and list the measures to prevent damage / destruction.

Slovakia

- a special chapter in prologue dealing with the importance of sustainability would enhance the messages of isolated fragments of sustainability in the strategy;
- measures listed in the strategy should be less general;
- indication of financial tools and allocations should be added;
- challenge to involve more organizations with focus on sustainability principles;
- chapter on indicators, time schedule and monitoring needed in the future document.

Poland

- 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;

- it is necessary to recognize other fields where tourism may be complementary to the development of these sectors of economy, social and environmental aspects;
- 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;
- the tourism resources and market analysis for national tourism development should include natural resources presented from the point of view of ecosystem services;
- national tourism marketing need to include more offer of touristic regions and territorial partnerships next to the offer of administrative regions;
- 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.

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/wp-content/uploads/2012/08/CEEweb_STWG_NTDS-Assessment-Methodology-final1.pdf

b) Assessed national tourism strategies: <http://www.ceeweb.org/work-areas/working-groups/sustainable-tourism/activities/>

