

## **Assessment of National Tourism Development Strategy - Ukraine -**

This analyse was prepared on the base on Assessment Criteria and Methodology for a National Sustainable Tourism Development Strategy of CEEweb for Biodiversity (Sustainable Tourism Working Group).

### **Author and contact person:**

Andriy-Taras Bashta  
Association "Fauna"  
Trylovsyky st. 7/54  
Lviv 79049 Ukraine  
e-mail: association.fauna@gmail.com

**Name of the document:** State Programme of Tourism Development for 2002-2010

### **1. Introduction to Ukrainian National Tourism Strategy assessment**

*State Programme of Tourism Development for 2002-2010* is a strategy document, devoted to priority areas and directions for development of tourism branche.

Tourist activity became to have more and more importance for development of economics and social sphere in Ukraine. Priority direction of tourist development is important factor of increasing of life quality of inhabitants in Ukraine, creation of additional workplaces, and increasing of its authority on international scene.

*State Programme of Tourism Development for 2002-2010* is created to stimulate efficient use of existing recreational resources, improve inter-sectoral cooperation, and encourage the development of market relations in the tourism sector, to determine the perspectives for further development of tourism based on the analysis of its current state.

The program provides the implementation of measures to improve the management tourism industry, develop appropriate legislation, accumulation of material and financial resources required for structural transformations, strengthen the existing resource base, improvement of statistics in this area, creating conditions for implementation investment projects. In addition, work on attracting foreign and domestic investors to develop tourism infrastructure, ensuring the needs of industry for highly skilled personnel, increasing the volume of tourist services by expanding inbound and domestic tourism, the implementation measures of state support for advertising and information activities, development of innovative projects and research on tourism carried out during the implementation of the program.

Despite the fact that Ukraine has a huge tourist potential, there are several factors that prevent and retard its development:

- lack of a coherent system of tourism management in the regions;

- subordination of tourist accommodation facilities, spa, health and recreational facilities that provide travel services to various ministries and other central bodies of executive power;
- imperfection of the legal legislation;
- lack of technical, organizational, informational and material support entities tourism industry by the government;
- slow growth of investment in the development of the material base of tourism;
- lack of appropriate facilities for the development of tourism in rural areas;
- mismatch of majority of tourist facilities to international standards;
- tendency to reduce the number of hotel management companies;
- unsatisfactory state of tourism, service and information infrastructure in the areas of roads and international transport corridors;
- unbalanced social and economic efficiency of the use of recreational resources and the need for their conservation;
- imperfection tourism infrastructure, ineffective use of recreational resources;
- lack of innovative projects and research on the development of promising tourism;
- imperfection of statistics concerning the tourism;
- insufficient supply of qualified tourism professionals;
- lack of government support and a comprehensive approach to promote national tourism product in the domestic and international tourism market;
- insufficient level of information infrastructure;
- imperfection of evidence base on tourism objects.

#### **Goal and main tasks of *Programme***

The primary goal of *Programme...* is: creation of competitiveness tourist product at the international market, which is able to satisfy maximally tourist requirements of population of country, providing on this base the complex developments of regions under conditions of ecological sustainability and cultural heritage.

#### **The main tasks of the *Programme...* states as follows:**

- sustainable development of the tourism industry and increase its part in the macroeconomic amount;
- improvements in living standards and creating workplaces;
- increasing the part of the expected income from the tourism industry in the state budget;
- improving the image of Ukraine on the international level.

The *Programme* identifies areas for tourism development:

- improvement of the management system;
- improving the regulatory framework of tourism;
- strengthening the material base of tourism;
- expansion of international cooperation in the tourism sector;
- improving the quality and expand the range of travel services;
- improving of transport services;
- efficient use of recreational resources and cultural heritage;
- improving information and advertising support;
- introducing effective innovation and create the scientific base of tourism;
- improving of staffing.

The document stipulates that the basic condition of the state program realisation are direction of actions of central and local executive authorities, local self-government on creating and maintaining a favorable environment for the development of tourism in Ukraine. Therefore, local authorities within their powers approved targeted state, regional, and other programs for tourism development.

Some areas have taken important steps to improve the efficiency of enterprises tourism industry. Thus, Ivano-Frankivsk region made approved regional target program of development of tourism in the region in 2011-2015 (which is used to assess the tourism development strategy at the regional level as one of the best examples). However, the situation in most regions of Ukraine in the sphere of tourism of today requires government influence and the implementation of appropriate measures for adjustment.

Ukrainian tourism is characterized by both positive and negative trends, but there are many problems that must be resolved by reviewing the principles and priorities of the regulation, to improve management mechanisms tourism industry.

Creating the legal framework of state regulation in the field of tourism, tax policy, privatization and corporatization, creating favorable investment conditions are still very actual topics. It is necessary to specify the powers and involvement of the state in regulating the tourism market, because it forms the basic operating conditions of tourist activities at both the national and international level.

However, the methods of influence used today to regulate the tourism industry, are not always adequate to modern conditions and trends. Improvement of the regulation mechanisms of economic activity on the experience of countries with developed tourism industry is important for changing of the situation.

State support for tourism development has not always been effective. According to the realisation results of some of this program activities, creation of favorable organizational, legal and socio-economic environment for the development of tourism and recreation industry have not been provided.

Some privileges for tourism development were eliminated: 1) special legal regime of investment, customs and exchange regulation and taxation of priority development (in particular, eliminated exemptions from import duty, value added tax, corporate income tax, duty to the State Innovation Fund payments for land) for some touristic regions, 2) stable state guarantees for the special regime of investment activity.

## **2. National Tourism Strategy as a public planning document**

The State Programme of Tourism Development is available on the site: <http://www.zakon.rada.gov.ua/lows/show/583-2002-II>. Document is only in Ukrainian version.

State social programme of development of sport and tourist infrastructure in Ukraine in 2011-2022: <http://www.zakon.rada.gov.ua/lows/show/707-2011-II>. Document is only in Ukrainian version.

Detailed development program, including regional aspects, based on the State program ..., have been developed at regional and lower (district, city) levels. Regional and local programs are designed for the period 2011-2015. Most programs are freely available on the Internet sites of the regional governments. Annually reports about realization of the

Programme existed for some regions at the regional (at the level of provinces) and local (at the levels of the regions and cities).

The State Agency of Ukraine for Tourism and Resorts has been created by the Decree of the President of Ukraine as the main implementing authority for the Programme realisation.

Representatives of Ukrainian Federation of Employers in sphere of Tourism of Ukraine jointly with experts from regional organizations have developed the project of Law of Ukraine "On special regime of investment activity in tourism, hotel management and resorts" in order to create a legislative basis for the implementation of measures for the development of tourism, hotel infrastructure and resorts defined in state targeted programs.

There are several programs devoted more or less to the development of tourism. They are quite general (general description of the purpose, objectives, a list of deficiencies, general guidelines or specific management agencies etc.). However, almost each region of Ukraine implemented the regional tourism development programs, based on the governmental programs and decrees. These regional programs are very different and some of them are pretty wide and precise elaborated. So, I made two versions of assessment; first of them is for the country level ("State level"), second one is for the regional level ("Regional level") (on the base of better examples of programs in some areas). Making of averaged version of the regional programs is impossible.

The draft State program sustainable rural development for the period up to 2020 developed for the implementation of the Cabinet of Ministers of Ukraine "On approval of the concept of State program of sustainable rural development for the period till 2020". Agricultural and Rural Development Agricultural tourism is one of the priorities of the program.

Some additions and changes to the Law of Ukraine "About Tourism" about informing of tourism services consumers and the development of infrastructure, and the Law of Ukraine "On Insurance" about necessity of insurance of tourists are discussed today.

According to the Law of Ukraine "On Amendments to the Law of Ukraine" On Tourism "», responsibility/liability of local governments (authorities) increased significantly the for the level of tourism development in regions. They are responsible for developing local tourism development programs, performance measures related to the protection and preservation of local tourism resources, to align with the state standards of tourist services in hotels, motels, campgrounds, for tourism enterprises and organizations in road transport; promote development in different types of tourism, creation of information centers and more.

The draft State program on sustainable rural development for the period up to 2020 is under development for the implementation of the order of the Cabinet of Ministers of Ukraine "On approval of the concept of State program of sustainable rural development for the period till 2020". Agricultural and Rural Development Agricultural tourism is one of the priorities of the program.

**The document basic information**

<b>Name of the main document representing tourism policy in the country</b>	<b>Years of implementation</b>
<p>State Programme of Tourism Development for 2002-2010. <i>About 40 different state organizations are involved to the Programme implementation of different tasks. The main of them are: State Tourism Administration (coordination of activity of central and regional executive bodies, with annual report about the Programme implementation to the Cabinet of Ministers of Ukraine) as well as Ministry of Finances, Ministry of Economics, Ministry of Transport, Regional State Administrations, all the regional administrations etc.</i></p>	<p>2002-2010</p>
<b>Names of the complementary planning documents and initiatives</b> (linked to the other sectors for example such as in point no.9 in the evaluation table)	<b>Years of implementation</b>
<ul style="list-style-type: none"> <li>- State programme of development of trans-border cooperation for 2011-2015 (1.12.2010, N 1088). Improving of trans-border cooperation in tourism branch. It includes some positions concerning development of recreational infrastructure and creation of trans-border tourist routes as well as informational support of trans-border tourism (Ministry of infrastructure, Min.of Ecology and Natural Resources, regional administrations), organization of international conferences, exhibitions etc. for investigations and popularization of new technologies in tourist services (Ministry of infrastructure, regional administrations).</li> <li>- "Conception of the State social target program of development of sport and tourist infrastructure in Ukraine for 2011-2022". The purpose of the Program is to promote sports and tourism infrastructure, creating the conditions for eligibility of the Winter Olympic and Paralympic Games in 2022 in Ukraine (state institutions of different levels).</li> <li>- Decree «About the measurements concerning the state support of the touristic industry for the preparation to the European Football Championship 2012» (state institutions of different levels).</li> <li>- Strategy for tourism and resorts development, 6.08.2008, N 1088-p (state institutions of different levels).</li> <li>- Law of Ukraine "On tourism". According to this Law, tour operator activity needs the state license only.</li> <li>- Law of Ukraine "On Amendments to the Law of Ukraine" On Tourism "».</li> </ul>	<p>2011-2015</p> <p>2011-2022</p>
<b>The documents' achievements and future projects</b>	<b>Years of implementation</b>

<p>Conception of the State Programme of development of rural areas (03/02/2010, N 121-p) Law of Ukraine «About the land-zoning» Law of Ukraine «About the special regime of investment activity in the sphere of tourism, hotel economy and health resorts» “State target program on the sustainable development of rural area for the period till 2020 year’. <i>Development of the rural green tourism is one of the priorities in this program.</i></p>	<p>2020</p>
------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	-------------

**The evaluation table**

Name of an indicator	Scores (S) and Weights (W)		
<b>I Description of the document and elaboration process</b>	<b>W<sub>1</sub>=0.1</b>		
1. The document representing tourism policy in the country:	<b>S=3</b> if yes		
<ul style="list-style-type: none"> <li>- general plan of social-economic development</li> <li>- sector plan (national tourism strategy)</li> <li>- operative plan for government actions and agendas</li> <li>- the strategy is published in an easy-to-read version which does not exceed 100 pages comprising major targets</li> </ul>		State level S <sub>1</sub> 3 S <sub>2</sub> 3 S <sub>3</sub> - S <sub>4</sub> 3 S <sub>1</sub> Priority direction of tourist development programme is important factor of increasing of life quality of inhabitants in Ukraine and creation of additional workplaces. S <sub>3</sub> Programme includes only very general instructions. S <sub>4</sub> In my opinion, this is rather not too appropriate criteria, because very simple and general Programme will obtain the highest valuation.	Regional level 3 3 3 3
2. The national strategy sets out clear priorities, goals, policies, objectives, interventions and expected results that contribute to improving biodiversity protection and meeting national and global commitments in the:	S = 1 if just the long term vision (up to 10 years) is included S = 2 if sustainable tourism is included by enhancing issues where tourism can make a difference S = 3 if sustainable tourism and biodiversity protection is included		
<ul style="list-style-type: none"> <li>- vision of national tourism policy</li> <li>- goals of national tourism policy</li> <li>- objectives of national tourism policy</li> <li>- operational measures/tasks</li> <li>- expected results/indicators</li> <li>- expected results (outcomes) of national tourism policy</li> </ul>	S <sub>5</sub> S <sub>6</sub> S <sub>7</sub> S <sub>8</sub> S <sub>9</sub> S <sub>10</sub>	2 2 2 1 1 2 Biodiversity protection is not	3 2 2 2 - 2

		included to the Programme at all. S <sub>9</sub> The Programme includes expected results, but no any indicators.	
3. Targets or norms are established by governments (in other strategic documents as well) considering areas such as:		S = 1 if the relevant planning document exists S = 2 if the tourism issues are included in the document S = 3 if the tourism issues and biodiversity protection is included S = 4 if there are targets set which influence tourism sector S = 5 if there are targets set which influence tourism sector and biodiversity protection	
<ul style="list-style-type: none"> <li>- land-use zoning</li> <li>- ecosystem functioning</li> <li>- biodiversity conservation and sustainable use</li> <li>- sustainable transport</li> <li>- green house gas reduction in the tourism industry</li> <li>- climate change adaptation and mitigation in destinations</li> <li>- waste reduction and management</li> <li>- poverty alleviation/mitigation</li> </ul>	<ul style="list-style-type: none"> <li>S<sub>11</sub> 2</li> <li>S<sub>12</sub> -</li> <li>S<sub>13</sub> 2</li> <li>S<sub>14</sub> 4</li> <li>S<sub>15</sub> -</li> <li>S<sub>16</sub> -</li> <li>S<sub>17</sub> 1</li> <li>S<sub>18</sub> 2</li> </ul>	<ul style="list-style-type: none"> <li>S<sub>14</sub> Improving of the transport infrastructure is among the main tasks of Programme.</li> <li>S<sub>16</sub> Tourism usually not included to any governmental documents concerning the alternative energy.</li> </ul>	<ul style="list-style-type: none"> <li>2</li> <li>-</li> <li>2</li> <li>4</li> <li>-</li> <li>-</li> <li>1</li> <li>2</li> </ul>
4. Strategy formulation process includes the following actions:		S = 1 if the information about the document formulation is available for stakeholders S = 2 if the stakeholders are invited to the meetings or other form of involvement into the formulation process S = 3 if the active contribution was accompanied by research on the type of tourism the stakeholders want to host	
<ul style="list-style-type: none"> <li>- baseline information is gathered on the base of multistakeholder consultations</li> <li>- local communities are involved in the consultations and their active role in destination management is recognized</li> <li>- public and private sector work together during the consultations</li> </ul>	<ul style="list-style-type: none"> <li>S<sub>19</sub> 1</li> <li>S<sub>20</sub> -</li> <li>S<sub>21</sub> 1</li> </ul>		<ul style="list-style-type: none"> <li>1</li> <li>2</li> <li>2</li> </ul>
<b>II Situation analysis and programming</b>		<b>W<sub>II</sub>=0.2</b>	

5. The tourism resources and market analysis for national tourism development	<p>S = 1 if there are major stakeholders and elements of supply and demand of tourism market included                  S = 2 if there are major stakeholders and elements of supply and demand of tourism market included (including separate analysis of country's tourism destination and regions)                  S = 4 if there are major stakeholders and elements of supply and demand of tourism market included (comprising separate analysis of country's tourism destination and regions) and natural resources are presented from the point of view of ecosystem services</p>		
<ul style="list-style-type: none"> <li>- domestic (national) market: major stakeholders (tour operators, travel agents, national and regional authorities, NGOs etc.)</li> <li>- tourism supply: product, services, infrastructure and facilities</li> <li>- demand of the domestic market (income, costs, positive/negative events, working hours)</li> <li>- strategic planning method analysis (e.g. SWOT)</li> <li>- needs for further development and official forecasts</li> </ul>	S <sub>22</sub>	1	4
	S <sub>23</sub>	1	4
	S <sub>24</sub>	-	2
	S <sub>25</sub>	1	4
	S <sub>26</sub>	-	2
6. Political factors, EC-politics, international aspects of tourism development	<p>S = 1 if the description includes the national destination only                  S = 2 if the description includes the national and regional destinations                  S = 3 if the description includes the national and regional destinations and their competitiveness is described</p>		
<ul style="list-style-type: none"> <li>- product and infrastructure development, general industrial policy starting points</li> <li>- destination marketing</li> <li>- reinforcing the image of the country as a tourist destination</li> <li>- benchmarking (product, strategic)</li> <li>- the strategy gives the answer to which type of tourism is best for the national destination</li> </ul>	S <sub>27</sub>	1	3
	S <sub>28</sub>	1	2
	S <sub>29</sub>	1	3
	S <sub>30</sub>	-	-
	S <sub>31</sub>	-	3
<b>III The grade of enhancement on sustainable approach to tourism in policies</b>	<b>W<sub>III</sub>=0.1</b>		
7. Linkage of tourism to other sectors (the grade of complementation of management documents of the following sectors with tourism development planning)	<p>S = 1 if there are tourism issues involved in documents                  S = 3 if there are targets within the documents which define how tourism will help to solve problems of other sector (e.g. agrotourism complements aims of rural development strategy)                  S = 5 if there are targets within the documents which define how tourism will help to solve problems of other sector involving the quality of live for host and visitor</p>		

	S = 6 if there are targets within the documents which define how tourism will help to solve problems of other sector involving the quality of live for host and visitor and there is a special chapter in tourism strategy describing the connections		
- environmental policy	S <sub>32</sub>	3	6
- agriculture and forestry	S <sub>33</sub>	3	3
- regional and rural development policy	S <sub>34</sub>	3	5
- transport strategy	S <sub>35</sub>	3	3
- health policy	S <sub>36</sub>	1	1
- employment policy	S <sub>37</sub>	5	5
8. Reference to sustainable tourism agreements, conventions, protocols, EU policy towards development of sustainable tourism and nature conservation:	S = 2 if there is a reference to at least 1 document S = 3 if there is a reference to 2 S = 4 if there is a reference to more than 2		
1) the Global Code of Ethics for Tourism (GCET) as a comprehensive set of principles designed to guide key-players in tourism development (WTO) 2) the United Nations Convention on Biological Diversity, especially Decision VII/14 Biological Diversity and Tourism and Decision V/25: Biodiversity and tourism, 2004 3) The Charter for Sustainable Tourism (developed in Lanzarote, Canary Islands) Spain, 1995 4) EU Sustainable Development Strategy (EU SDS) with indications for national policies on law foundation for sustainable development of tourism, implementation of principles for tourism in other sectors of state activity and enhancement on scientific research on relations between tourism development and environment protection 5) the Agenda for a Sustainable and Competitive European Tourism 6) European Charter for Sustainable Tourism in Protected Areas 7) Agenda 21 as a comprehensive plan of action to be taken by governments in every area in which human impacts on the environment, Rio de Janeiro, 1992 8) The Pan-European Biological and Landscape Diversity Strategy (PEBLDS) adopted at the 3rd Ministerial Conference "An Environment for Europe", Sofia, 1995 9) EU Strategy for the Danube Region, the Carpathian Convention (Tourism Protocol) 10) Other related to sustainable tourism development (fill with the name): .....	S <sub>38</sub>	3 S <sub>38</sub> There is no any reference to these documents; however, a range of positions from the points 1, 4 and 5 are included to the programme. Global Code of Ethics for Tourism was supported by Ukraine in Oktober 2010 at 65th session of UN.	-

9. Social benefits and community profits	S = 3 if there are outcomes defining how tourism will contribute to the evaluated issue S = 4 if there are outcomes defining how tourism will contribute to the evaluated issue and recommendations for regional level tourism development strategies are included		
<ul style="list-style-type: none"> <li>- tourism is valued as the contributor to country's economy (preferably in %)</li> <li>- preservation and development of the culture in the region</li> <li>- distribution of income and prospects for employment</li> <li>- support to cultural heritage and local identity</li> <li>- maintenance of community infrastructure</li> <li>- participation of indigenous and local communities (e.g. community based tourism)</li> </ul>	S <sub>39</sub>	-	3
	S <sub>40</sub>	3	4
	S <sub>41</sub>	3	3
	S <sub>42</sub>	3	3
	S <sub>43</sub>	-	3
	S <sub>44</sub>	3	4
	S <sub>41-42,44</sub> Priority directions of tourist development include creation of additional workplaces, preservation and development the regional cultures etc, but without outcomes, how it will contribute.		
<b>IV Participation of institutions in tourism management</b>	<b>W<sub>IV</sub>=0.1</b>		
10. Setting up and enabling a National Tourism Organization as:	S = 3 if yes		
<ul style="list-style-type: none"> <li>- a national body for tourism businesses and destinations</li> <li>- a source of best practice, offering tourism business advice</li> <li>- a custodian of the national product database</li> </ul>	S <sub>45</sub>	3	3
	S <sub>46</sub>	3	3
	S <sub>47</sub>	3	3
	S <sub>45-47</sub> Such unit is created by separate orders of the government. However, it is not mentioned in the Programme.		
11. Enhancement on bottom – up approach in destination management	S = 3 if yes		
<ul style="list-style-type: none"> <li>- local tourism bodies are responsible for a tourism destination which reflects the natural geography of an area's visitor economy (rather than local public sector or electoral boundaries)</li> <li>- the tourism policy gives the possibility for tourism bodies to band together into larger groups voluntarily</li> <li>- ensuring financial sustainability of the bodies with minimum reliance on public funds (can act as partners with local authorities or local business partnerships)</li> <li>- reduction of taxes to central level</li> </ul>	S <sub>48</sub>	3	3
	S <sub>49</sub>	3	3
	S <sub>50</sub>	3	3
	S <sub>51</sub>	-	-

<ul style="list-style-type: none"> <li>- supporting creation of Destination Management Organization rather than Marketing Organizations</li> <li>- partnership between public sector and local authorities and local businesses and attractions</li> <li>- recognition of role of the bodies for Regional Development Strategies</li> </ul>	S <sub>52</sub>	-	-
	S <sub>53</sub>	3	3
	S <sub>54</sub>	3 S <sub>51</sub> Conversely, some privileges for tourism development were eliminated. S <sub>54</sub> It is mentioned in the Law of Ukraine "On Amendments to the Law of Ukraine" On Tourism "».	3
12. There are responsibilities determined for the strategy implementation for the following bodies:	S = 5 if yes		
<ul style="list-style-type: none"> <li>- ministries</li> <li>- the local and regional governments</li> <li>- tourism business associations, clusters, tourism entrepreneurs etc.</li> <li>- the non-governmental sector</li> <li>- protected area authorities, environmental institutions etc.</li> </ul>	S <sub>55</sub>	5	5
	S <sub>56</sub>	5	5
	S <sub>57</sub>	5	5
	S <sub>58</sub>	-	-
	S <sub>59</sub>	5	5
<b>V Sustainable development of tourism businesses, supply of services and special enhancement addressing nature protected areas</b>	<b>W<sub>V</sub>=0.2</b>		
13. Plans to increase the number of environmentally oriented tourism providers and offerings by:	S = 1 if recommendations of the following actions are listed S = 2 if there are operative actions described for the implementation S = 3 if there are operative actions described and indicated bodies responsible for the implementation of these actions		
<ul style="list-style-type: none"> <li>- support of certification and labelling schemes</li> <li>- strengthening cooperation between (organisation and financing) public and private entities as well as partnerships for sustainable tourism development</li> <li>- educational programs for tourist staff and their professionalization in the framework of tourism environmental impact and social responsibility</li> </ul>	S <sub>60</sub>	-	1
	S <sub>61</sub>	1	3
	S <sub>62</sub>	1	2
14. Grade of incentive and encouragement to sustainable practices in tourism companies:	S = 1 if country has sustainable policy for resources management with relevant legislation S = 2 if the legislation provides alternatives for resources' using S = 3 if state government stimulates sustainable practice with finance benefits (tax reducing, tariff reducing)		

- energy efficiency - efficient water management solutions - waste management	S <sub>63</sub> S <sub>64</sub> S <sub>65</sub>	1 1 1	1 1 1
15. Support for financial contribution from the tourism industry to nature protection services:	S = 3 if there are: a system or instruments with relevant legislation and rules S = 4 if there is evidence (data) that stakeholders use these instruments		
- enhancing regional marketing as the foundation for sustainable tourism development, particularly in UNESCO biosphere reserves and national parks - areas close to or in populated regions are protected for nature-based recreation - incorporating the European Union network of Natura 2000 sites in tourism territorial development and marketing	S <sub>66</sub> S <sub>67</sub> S <sub>68</sub>	4 4 -	4 4 -
<b>VI Tourism strategy measures</b>			
<b>W<sub>VI</sub>=0.1</b>			
16. Indicators and targets comprise important part of the strategy	S = 4 if yes If no go to indicator no. 22		
- strategy includes targets to be fulfilled - strategy recommends indicators for monitoring - targets are combined with indicators in order to measure impacts	S <sub>69</sub> S <sub>70</sub> S <sub>71</sub>	4 - -	4 4 4
17. Indicators for monitoring are described in 8 groups as headline indicators (not only complementary indicators):	S=0 if the indicator is not included in the strategy S= 1 if the indicator is included in the strategy		
(a) political - value of micro-loan program for local businesses respecting sustainability criteria and number of SMEs (Small and Medium Enterprises) supported by the programme - measures for evaluating tourist information policy (grade of including sustainability criteria in tourism promotion e.g. communicating access code for tourists, evaluation of tourist behaviour, knowledge and attitudes) - measures to policy for disabled people and equal access to tourism - the map of regional supply chains through the establishment of local or regional cooperation (e.g. territorial communes tourist associations, clusters) - measures of participation and local control (measures of accessibility to information about the strategy, number of people and stakeholders that participated in decision-making process and the quality of their participation)	S <sub>72</sub> S <sub>73</sub> S <sub>74</sub> S <sub>75</sub> S <sub>76</sub>	0 0 0 0 0	0 1 1 1 0

- existence and quality of management plans, visitor regulations and monitoring measures	S <sub>77</sub>	0	1
<b>(b) economic</b>			
- value of tourism expenditure in tourism destination by target groups of tourist (annual growth) or change in visitor spending	S <sub>78</sub>	0	1
- percentage of GDP coming from tourism	S <sub>79</sub>	0	1
- measures taken to reduce the dependency on tourism and seasonality (percentage of income coming from tourism in the time-scale of the year, percentage of fulltime, part time and seasonal jobs in tourism, local unemployment rate off-season, local unemployment rate off-season)	S <sub>80</sub>	0	1
- length of average tourist stay (in days)	S <sub>81</sub>	0	0
- percentage of people employed in tourism or tourism related jobs	S <sub>82</sub>	0	1
- percentage of change in the total number of tourists	S <sub>83</sub>	0	1
- growth in % of the surface of the areas which are used for tourism	S <sub>84</sub>	0	0
<b>(c) socio-cultural</b>			
- increase/decrease in cultural activities or traditional events and level of participation	S <sub>85</sub>	0	1
- level of awareness of local values and cultural heritage	S <sub>86</sub>	0	0
- number of local businesses related to the local culture (handicrafts, music, food)	S <sub>87</sub>	0	1
- extent of traditional land use	S <sub>88</sub>	0	0
- number and quality of infrastructure development stimulated by tourism	S <sub>89</sub>	0	1
- percentage of locals using tourism related infrastructure	S <sub>90</sub>	0	1
- proportion of tourism revenues reinvested by administration in public responsibilities	S <sub>91</sub>	0	1
- tourism's contribution to the preservation of cultural goods	S <sub>92</sub>	0	1
- evaluation of the local inhabitants' experiences with and attitudes towards tourism (percentage of locals who are satisfied with tourism development)	S <sub>93</sub>	0	0
- evaluation of the tourists' experience	S <sub>94</sub>	0	0
<b>(d) service and product quality</b>			
- number of Green Tourism Business Awards	S <sub>95</sub>	0	0
- number and type of tourism attractions, tourism products and visitor infrastructure	S <sub>96</sub>	0	1

<ul style="list-style-type: none"> <li>- quality measures of accommodation, food, transport and other services</li> <li>- evaluation of safety</li> <li>- tourists' satisfaction evaluation (percentage of return visitors, visitor expectations versus experience measure, satisfaction rating for those visitors whose experience exceeded their expectations (in 1-5 scale, 1 (much worse than expected) to 5 (much better than expected))</li> <li>- length of the tourism season</li> <li>- existence and quality of visitor/information centers, interpretative materials (e.g. brochures, panels), guided tours, trails, cycling routes, signage (length of trails, number and language of signs)</li> <li>- level of training (guards, guides, information, catering, management, etc.)</li> </ul>	<p>S<sub>97</sub> S<sub>98</sub> S<sub>99</sub>  S<sub>100</sub> S<sub>101</sub>  S<sub>102</sub></p>	<p>0 0 0  0 0  0</p>	<p>1 1 0  0 1  1</p>
<p><b>(e) general environmental impacts</b></p> <ul style="list-style-type: none"> <li>- intensity of use (tourist/hectare or km of trails, carrying capacity indicators, level of use of protected areas and natural environment)</li> <li>- percentage of tourism businesses with appropriate resource management</li> <li>- behavior and attitudes of tourists and locals towards environmental protection</li> <li>- type and extension of protected areas, percentage of extended surface of protected areas and creation of new ones</li> </ul>	<p>S<sub>103</sub> S<sub>104</sub> S<sub>105</sub> S<sub>106</sub></p>	<p>0 0 0 0</p>	<p>1 1 1 0</p>
<p><b>(f) ecosystem quality</b></p> <ul style="list-style-type: none"> <li>- revenue from tourism allowed to environment protection activity</li> <li>- number and quality of direct engagement of tourism business in projects and programmes for the improvement of environment</li> <li>- effectiveness of resource management measured e. g. by amount of waste and water consumed per tourist per day</li> <li>- scale of impacts due to tourism infrastructure (e. g. erosion caused by trails, consumption of territory)</li> <li>- type and percentage of transport facilities used (tourists arriving by car, train, etc., number of tourists using public transport)</li> </ul>	<p>S<sub>107</sub> S<sub>108</sub> S<sub>109</sub> S<sub>110</sub> S<sub>111</sub></p>	<p>0 0 0 0 0</p>	<p>1 0 0 0 1</p>
<p><b>(g) biodiversity</b></p> <ul style="list-style-type: none"> <li>- percentage of endangered species</li> <li>- habitat status changes measures</li> <li>- monitoring of tourist flow is mentioned</li> <li>- tools for tourist flow mitigation are previewed</li> </ul>	<p>S<sub>112</sub> S<sub>113</sub> S<sub>114</sub> S<sub>115</sub></p>	<p>0 0 0 0</p>	<p>0 0 1 0</p>

<p><b>(h) environmental policy and management</b></p> <ul style="list-style-type: none"> <li>- amount of financial contribution of tourism to funding of conservation</li> <li>- number and type of measures to engage locals in protection activities (meetings, programs, expenditure)</li> <li>- percentage of locals actively involved in conservation activities</li> <li>- percentage of tourism managers with environmental training</li> <li>- percentage of tour operators and hotels with an environmental strategy or policy</li> <li>- existence of a land use or development planning process including tourism</li> <li>- existence of the environmental impact assessment legal procedure</li> </ul>	<p>S<sub>116</sub> S<sub>117</sub>  S<sub>118</sub> S<sub>119</sub> S<sub>120</sub>  S<sub>121</sub>  S<sub>122</sub></p>	<p>0 0  0 0 0  0  0</p>	<p>0 1  0 0 0  1  0</p>
		<p>S<sub>72</sub>-S<sub>122</sub> The issue of biodiversity, environmental protection has very little attention. Focus – on the development of tourism, including including its development in protected sites. Also there are no ecological indicators on the programme.</p>	
<p><b>VII Financing and Implementation of the National Tourism Strategy</b></p>		<p><b>W<sub>VII</sub>=0.2</b></p>	
<p>18. Financing</p>		<p>S = 1 if there are indicated concrete institutions who are responsible for financing                  S = 2 if there is indicated concrete amount for each measure implementation</p>	
<ul style="list-style-type: none"> <li>- financing is secured through governmental and voluntary resources for the entire period of the strategy</li> <li>- the strategy implementation is accompanied by a micro-loan program for local businesses respecting sustainability criteria</li> </ul>	<p>S<sub>123</sub>  S<sub>124</sub></p>	<p>1  0</p>	<p>2  1</p>
<p>19. Monitoring and Evaluation</p>		<p>S = 0 if no                  S = 3 if yes</p>	
<ul style="list-style-type: none"> <li>- M&amp;E is a substantial part of the strategy</li> <li>- the strategy has clearly described ways and means of monitoring, including the responsible body and intervals of monitoring</li> <li>- the periodical monitoring is made public</li> <li>- there are simple qualitative along with quantitative data gathering means</li> </ul>	<p>S<sub>125</sub> S<sub>126</sub>  S<sub>127</sub> S<sub>128</sub></p>	<p>0 0  0 0</p>	<p>3 3  3 0</p>

employed (household survey of local residents and visitor questionnaire, Delphi technique or in-depth interviews or focus group interviews of environmental expert groups) - tourism research on tourism market (product quality, visitor satisfaction with products and marketing) as well as relation tourism-environment (contribution of tourism to community economies, impact on nature and support for nature protection) in academic and expert institutions will assist and complement the strategy monitoring analysis - there is a specification of data sources for strategies' evaluation (according to what data is available at national level and where the new research is required)	S <sub>129</sub>	1	3
	S <sub>130</sub>	0	0
20. Execution	S = 1 if there are roles and responsibilities for private and public sector (governmental institutions, NGO, etc.) S = 2 if there is given time scale for each strategy measurement S = 3 if there is a financing for implementation		
- the strategy identifies clear roles and responsibilities of various stakeholders for the implementation of the strategy - the strategy has an integrated adaption tool, which allows for the review of the strategy after a given period of max. 10 years	S <sub>131</sub>	1	3
	S <sub>132</sub>	0	0
<b>Total Score (TS) = W<sub>I</sub> ΣS<sub>1-21</sub> + W<sub>II</sub> ΣS<sub>22-31</sub> + W<sub>III</sub> ΣS<sub>32-44</sub> + W<sub>IV</sub> ΣS<sub>45-59</sub> + W<sub>V</sub> ΣS<sub>60-68</sub> + W<sub>VI</sub> ΣS<sub>69-122</sub> + W<sub>VII</sub> ΣS<sub>123-132</sub></b>	<b>TS = 15,6</b>		<b>TS=29,1</b>
<b>Maximum Score (MS) = 45</b> <b>Percentage in which a strategy fulfills given indicators (P)</b> <b>P = (TS / MS) x 100%</b>	<b>P = 34,7</b>		<b>P=64,5</b>

## **Recommendations**

The situation in most regions of Ukraine in the sphere of tourism today requires state intervention and implementation of appropriate measures for adjustment. Binding 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.

According to international experience, a regional management organizational structure plays an important role in the regulation of tourism sector enterprises in the region. Improving the mechanisms of regulation of economic activity on the experience of countries with developed tourism industry, create 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 directions of the mechanism of regional management, tourism development. Regional agency or unit for marketing and promotion of tourism is necessary.

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 in the state register of tourist activities and associations, state control on the activity of non-government tourist associations by state authority on tourism, etc.

95% Ukrainian tourist objects are oriented on the outbound tourism. Therefore for the reaching of goals of tourism development programme would be very important to 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.

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.

There seems to be three basic directions of state support. First of all – creation of favourable investment climate for attraction of capital to the tourism industry, which may include some tax incentives.

The second one – development of transport infrastructure. For example, air service in Ukraine is practically in the hands of monopolists. They define the price of tickets, which are actually rather non-competitive. Therefore, it is necessary to create favourable conditions for the arrival of domestic and foreign air carriers and opening new routes. The third direction aims to create a clear and consistently funded program to promote tourism and recreation potential of Ukraine, both within the country and abroad. However, the action image program is unaddressed and therefore ineffective.

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 don't 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.

### **Concerning the evaluation table**

Probably, evaluation table should include rural (green) tourism development as one of criteria.