



WORKING GROUP ON TOURISM

Action Plan 2016-2018

I. INTRODUCTION

Tourism is a major economic activity in the Balkan and the Black Sea regions with wide-range impact on economic growth, employment and social development. It can be a powerful tool in fighting economic decline and unemployment. The catalyst for reviewing the strategic direction of regional tourism is the rapidly changing environment, which has fundamentally altered the way consumers think, behave and travel. Key challenges impacting regional tourism include:

1. Global financial crisis

The recent global financial crisis and destabilisation of the world economy presents a number of challenges for the Balkan and Black Sea (BBS) tourism industry. The slow-down in global economic and jobs growth has heightened consumer uncertainty. This is expected to slow spending in discretionary categories such as tourism and leisure, particularly from key inbound markets. The decline in confidence is also having flow-on effects in terms of investment, which could have a negative impact on the tourism sector.

2. Safety issues

The refugee and terrorism crisis that Europe has experienced in 2015, raise serious safety issues for the travelers. This is a crisis more severe than anything Europe has seen in decades. It will be very difficult for the European and for the BBS regions to regain travelers' confidence within the next few years.

3. Stagnant domestic tourism sector

Within the BBS regions, there has been a progressive decline in domestic leisure travel for virtually all travel categories since last decade. People have been taking fewer trips, spending fewer nights away and spending less per trip. This has been driven by a range of factors such as increased competition from other destinations, changing consumer expenditure patterns and growth in low cost airlines.

4. Changing consumption patterns

Domestic tourism's share of household consumption has declined, with a shift towards other categories (e.g. entertainment systems, renovations etc). Households are also servicing higher levels of debt, which is putting pressure on discretionary expenditure.



5. Growth in low cost carriers

The growth in low cost air carriers and route networks has increased capacity between tourism destinations and made air travel more accessible to a broader range of consumers. This shift presents a challenge for regional centres that are not in close proximity to major airports.

6. Rise of new technologies and media fragmentation

The emergence of new media and increased access to information has made consumers more savvy when selecting destinations and booking travel. The emergence of user generated sites and blogs has also enabled consumers to seek advice from a range of sources when making decisions about travel destinations, and made them harder to influence via traditional marketing. The increase in information has also increased consumer awareness of real value for money propositions.

7. Increasing competition

Balkan and Black Sea regions are facing intense competition from both neighboring destinations, which are becoming more innovative in aggressively marketing their offerings. Other destinations have been more aggressive in attracting new investment and developing new tourism experiences to better match the needs of today's more discerning consumers.

European Union's policy on Tourism

Tourism represents the third largest socioeconomic activity in the EU and is estimated to generate over 10% of the EU's GDP, providing approximately 12% of all jobs. It is therefore an important sector for both EU citizens and industry, with a positive effect on economic growth and employment within the EU.

The European Union's policy aims to maintain Europe's standing as a leading tourist destination while maximising the industry's contribution to growth and employment. It also promotes cooperation between EU countries, particularly through the exchange of good practice. The EU's competence in the tourism sector is one of support and coordination the actions of member countries. In June 2010, the European Commission adopted the Communication, '[Europe, the world's No. 1 tourist destination – a new political framework for tourism in Europe](#)'. This communication set out a new strategy and action plan for EU tourism.

Four priorities for action were identified:

- 1.To stimulate competitiveness in the European tourism sector;
- 2.To promote the development of sustainable, responsible, and high-quality tourism;
- 3.To consolidate Europe's image as a collection of sustainable, high-quality destinations;
- 4.To maximise the potential of EU financial policies for developing tourism.



The European Commission is focusing on the following priorities:

- increasing tourism demand, from within the EU and beyond;
- improving the range of tourism products and services on offer;
- enhancing tourism quality, sustainability, accessibility, skills, and ICT use;
- enhancing the socio-economic knowledge base of the sector;
- promoting Europe as a unique destination;
- mainstreaming tourism in other EU tourism policies.

The Balkan and Black Sea Commission's Working Group on Tourism has been focusing on assisting the tourism industry at a regional level to respond to and rise the aforementioned challenges. The *Action Plan 2016–2018* is expected to assist BBSC's regions to fulfil their opportunities to fully meet their tourism potential. In this highly competitive environment it is imperative that our regional offerings are distinct and tailored to meet the needs of the destination and visitors alike. The importance of tourism should not be underestimated. Tourism offerings highlight the value of local and natural attractions, generates economic activity, jobs and export revenues.

The Action Plan 2016–2018 addresses cross-regional issues and confirms the priorities for the BBSC's regions. To deliver positive outcomes for local communities, a coordinated and well supported effort is critical. The Action Plan has involved extensive consultation between BBSC members and sets out the future direction of tourism through various recommendations with a particular focus on improving regional tourism structures, improving the supply and quality of tourism experiences, increasing consumer demand for regional tourism and improving service standards.

Region of Central Macedonia, which is leading the Balkan and Black Sea Commission Tourism Working Group, will provide organization and coordination for the Balkan & Black Sea Commission Tourism Working Group within the general objective of harmonizing the interests of the BBSC regions, in order to reach to the technical objectives established through a mutual understanding and agreement between the members.

II. OBJECTIVES, PRIORITIES AND ACTIONS

An outline programme for implementation of the regional policy framework is summarised in Table 1. The table sets out the actions required to promote Thematic Tourism at the BBSC level. The range of actions cover several subsectors identified as priorities and are summarized under the following policy themes:



- Achieving institutional synergy
- Promote tourism networks and greater participation

Table 1: Outline Implementation Action Plan and Schedule

ISSUE	ACTION	ACTION BY
Achieving Institutional Synergy	Strengthen cooperation with other agencies Increase the efficiency of WG on Tourism Cooperation with BSEC, UNWTO Share learning	Regional Governments BBSC, CPMR BBSC, CPMR BBSC, Tourism Professionals
Promote Tourism Networks and Greater Participation	Involvement of local people Develop visitor facilities Creation of a network among professionals Promote multi-destination packages Launch of transnational projects Small group to check up on calls for proposals Develop open data indicators Promote thematic tourism initiatives	BBSC, Local Communities Local communities BBSC, regional stakeholders Travel agencies BBSC members BBSC members Regional stakeholders Local communities, regional stakeholders
Formulate and Implement Sustainable, Long-term Tourism Strategies	Integrated coastal zone management plan Integrate tourism development Tourism and Environmental Management Heritage tourism Local Craft	BBSC, Regional Authorities BBSC, Regional Authorities Local Communities, Regional Authorities, EU agencies, Academic and Scientific Community BBSC, Regional Authorities Regional Authorities, Local Communities

1. ACHIEVING INSTITUTIONAL SYNERGY

Tourism is now an important contributor to the economy of most of the countries in the Balkan and Black Sea areas. However, tourism tends to be isolated and driven by a limited agenda such as short-term income generation and visitor numbers. In view



of the multifaceted nature of the industry there is need to strengthen the linkages between tourism and the other sectors of the economy and the environment. This is particularly significant in a region where tourism relies on environmental resources and there is a critical link between tourism and the environment, and natural resources management and planning. There is therefore urgent need to strengthen links between resource development and tourism. Regional governments need to address and strengthen the role of Tourism Agencies (Directorates and Departments) as vehicles of intersectoral/interdepartmental coordination and cooperation with Environmental and Development Agencies. The lack of cooperational schemes with such agencies slows the tourism development processes and makes the tasks of the already overburdened and understaffed Tourism Departments extremely difficult.

Particular importance has to be given to the issue on how to increase the efficiency of the work of the BBSC Working Group on Tourism. In order to have an enhancing mutually beneficial cooperation between the members and a better coordination, there has to be an agreement on common actions, which will promote and position the Balkan and Black Sea regions as appealing leisure and business destinations and will increase the attractiveness for tourism investments and develop high value forms of thematic tourism.

Capitalization of the output of previous projects and elaboration on ideas for the promotion and development of the Balkan and Black Sea Area.

There is the background, there is the potential product, so we have to create the "idea" that will highlight the originality and uniqueness of the area and will assist the design and implementation of its promotional programs.

Establishing common actions and activities is considered crucial to improving our tourism product. It is recommended to set up an inventory and to exchange best practices and initiatives on how to improve the attractiveness of the tourism destinations of our regions, how to provide incentives for businesses to upgrade their facilities.

As a long term goal in order to strengthen our institutional capacity, there has to be an establishment of cooperation with the Organization of the Balkan Sea Economic Cooperation (BSEC) and the World Tourism Organization (UNWTO). The main objective will be to enhance cooperation with them and to identify areas of mutual interest with a view to enhancing of the cooperation in the field of tourism, particularly by creating and implementing common regional projects aiming at raising awareness of the Black Sea Region as tourism destination worldwide.



2. PROMOTE TOURISM NETWORKS AND GREATER PARTICIPATION

It is essential to involve a wide range of stakeholders including local communities in the development of all aspects of the sector, from the initial stages of developing strategy through planning and delivery initiatives. By strengthening linkages between tourism and other sectors of the economy, and between regional governments and the private sector a greater level of participation would be assured. Greater community involvement in the sector would be made possible by allowing greater community ownership of assets and resources. Promoting greater participation may be achieved through the following actions:

- Promote and share learning within the tourism industry. Raise awareness amongst stakeholders of the public and private economic sector with knowledge exchange and public interaction for using new technologies to the benefit of their areas/countries/regions development.
- Develop the involvement of local people and communities in tourism initiatives
- Develop visitor facilities to benefit the local community and their visitors, e.g., local heritage centres.
- Consider initiating the creation of a network among existing regional public/private organisations, professional associations and educational institutions from the BBS member regions, which are involved actively in promoting thematic tourism in their regions.
- Explore ways to encourage the national/regional associations of tour operators and travel agencies from the BBS member regions to promote thematic tourism multi-destination packages outside the BBS area.
- Stimulate the launch of transnational projects in the BBS area in the field of sustainable thematic tour itineraries (e.g. gastronomic, religious, etc) and consider their possible funding. These projects could involve stakeholders from different destinations throughout the BBS area, which offer a mixture of products, services and activities with a view to increase their visibility.
- Set up a group to continuously search for open calls for proposals and to share them with all BBS members
- Develop a number of open data indicators for measuring and evaluating offered tourism services and products and encourage researches and results



- Promote events specifically promoting thematic tourism initiatives and teaming with festivals, open laboratories and citizens communities.

3. FORMULATE AND IMPLEMENT SUSTAINABLE, LONG-TERM TOURISM

STRATEGIES

An integrated approach to examining physical, socio-economic and institutional aspects of tourism, is one method of achieving strategic planning for sustainable tourism. In order to ensure sustainability with growth these tourism strategies or sustainable tourism master plan should address the following issues:

- Optimizing tourism's contribution to economic growth at local levels
- Enhancing and contributing to cultural heritage preservation at the local level
- Developing a diversity of destinations, products/attractions and markets to minimize exposure to major internal and external threats to tourism activity

However the preparation of a sustainable tourism master plan will not by itself ensure sustainable tourism development. Because of the multi-faceted effects and potentials of tourism there is need for planning for tourism to become more closely integrated into the overall policy and planning framework of the regions in the BBS area. In this process, cross departmental collaboration is important to ensure a more coherent, integrated and comprehensive approach. Reliable measuring instruments must be established for a destination or locality as a check against any over exploitation of resources.

Suggested actions:

a. Set up and carry out integrated coastal zone management plan

Coastal and marine resources in the BBS area have suffered impacts brought about by the fact that the majority of tourism development in the region has been in the coastal zone. Good tourism planning and policy management require a framework of effective coastal zone management. The preparation and implementation of this plan should:

- be a progressive process;
- involve all relevant regional bodies, research institutions, NGOs and the local population; and



- establish management strategies that rely on a systems approach recognizing connections among coastal and marine activities.

As part of an integrated coastal zone management plan, zoning of activities is an important element. Not only should activities or land use be zoned according to general categories, but also, within these general categories, there should be further “sub-zoning”. Noisy hotels in tourist developments, for example, should be relegated to areas separate from quiet zones. Another important aspect of the zoning exercise is the allocation of public parks, public paths and public access to beaches. These should be safeguarded and reclaimed where they have been displaced by developments. This type of zoning should be carried out in relation to future development, as well as existing situations.

The Region of Central Macedonia together with other partners, has submitted a project proposal during last year on Integrated Coastal Zone Management, to the Framework Programme “Interreg MED” for funding. The main target of this project proposal is to define common strategies, policies and action plans, as well as to develop tools and procedures for a sustainable and responsible coastal and maritime tourism in the MED area. The main objectives of the project proposal are the following:

- Data gathering, in order to build a comprehensive profile of each participating region (Mediterranean coasts). In each region equipment could be installed to monitor and analyze the land uses and the consequences on tourism sustainability.
- Creation and maintenance of a Mediterranean IT platform that integrate environmental data, climate information and different strategies and policies for sustainable and responsible tourism management. This is in order to promote sustainable and responsible coastal and maritime tourism.
- Development of a Regional Adaptation Action Plan for the integration of Integrated Coastal Zone Management (ICZM) and/or Maritime Spatial Planning (MSP) principles, objectives and actions related to tourism into national or regional policy frameworks and instruments

b. Integrate tourism development into improving and upgrading the destinations

- Developing tourism on an environmentally sustainable basis limited to carrying capacity of the environment and encouraging environmental conservation



In many BBS destinations the location of tourism development is also a crucial element in sustainable tourism. Development is often concentrated in enclaves along the coastline that has not only resulted in the displacement of traditional uses and users but also has excluded many from the benefits of such developments. For example, the rapid transformation of a fishing village into a major resort in Chalkidiki (RCM) has resulted in inadequate development of social and physical infrastructure. The lack of social infrastructure detracts from the visitor experience and provides a poor image for the destination. Destination planning for sustainable tourism development should not be carried out in isolation but should be integrated into overall land use planning and infrastructure development for the destination.

c. Strengthening Linkages between Tourism and Environmental Management

Strong linkages between tourism and environmental management are important. Because of its economic importance and extensive use of the landscape, tourism has the potential to affect, and be affected by, virtually all other economic, environmental and socio-cultural activities in some way. With respect to the environment, many linkages exist, but in almost all cases these linkages are weak, with little formal communication or inter-sectoral activity occurring. Institutional arrangements need to be devised that facilitate inter-sectoral integration through inter-agency partnerships. By expanding outreach efforts to stakeholders and community organizations, proactively pursuing net-working arrangements among pertinent regional and EU agencies, focusing budgetary resources on priority programmes and projects, and engaging the expertise of the academic and scientific community, there is real opportunity to forge an important link between tourism and integrated resource management.

d. Heritage tourism is an important vehicle for promoting local culture

Heritage tourism provides opportunities for diversification of the tourism product in the BBS region. While natural attractions are the main drawing cards, the region's strong and distinctive history has nevertheless left a varied cultural legacy that still remains relatively untapped in many of the territories in the region. In this regard, heritage tourism is an important vehicle for conserving and enhancing the cultural assets of the region. In addition to providing employment opportunities, a prime motivation to developing the historical resources in a responsible manner should be the economic regeneration it offers to many communities. Regional authorities can offer financing incentives to attract investment or submit project proposals to EU funding programmes in restoring or recreating historic buildings and landmarks, or entire historic zones.



e. Develop and promote local craft

An integrated approach is needed to develop and promote craft in many areas of the BBS region, particularly in many of the small developing areas. In these areas there has been less of a tradition of craft compared with other. As a result there is very little support for the industry and craft items and souvenirs made exclusively for tourism lack imagination and charm. In many instances souvenirs and craft items are not made locally, but are imported. Yet, the tradition for some local craft in some areas date back to the previous centuries. Recognition of this work by tourists has resulted in some acceptance by craft workers of this important part of their cultural heritage. The craft industry is in urgent need of support as it has the potential of reducing leakage of tourism generated spending and strengthen linkages between tourism and economic sectors. Programmes need to be developed for the upgrading of the traditional skills and methods of craft producers to promote quality production. Training is also required for promotion and marketing, and technical assistance needed to encourage collaboration and cooperation among artisans in production and marketing. There is also need to develop and promote local branding of craft, and festivals that encourage local initiatives in craft. Such festivals could promote the diversity of the countryside through an integrated programme of activities to include guided walks, wildlife watching opportunities, local markets, craft makers, historical re-enactments, themed weekends and holidays etc. Regional authorities and non-governmental organizations need to work with craft producers to develop public education programmes about the economic and cultural importance of the craft in industry to the tourism sector and also its export potential.

II. ORGANIZATION AND SCHEDULE

The Region of Central Macedonia, as leader region of the BBSC Tourism Working Group, propose the following in order to achieve our targets:

- preparation and activation of periodic working meetings;
- monitoring of policies and regulations, recommendations, etc. adopted by the European Institutions, analysis and decision-making agreements within the BBSC;
- participation in the CPMR Intercommission Tourism Group;
- submitting proposals to the BBSC Political Bureau and General Assembly;
- representation of the Group in the fora organized at European and Black Sea level on tourism issues, considered of interest;
- Synergies with the NECSTouR network.

Participants:



- a coordinator from the Region of Central Macedonia;
- one member from each participating region of the BBSC, in charge of tourism;
- a representative of the BBSC Secretariat;
- a representative of the CPMR Intercommission Tourism Working Group;
- external technical and institutional partners, as necessary.

The group should assign its main tasks in a coherent way to its members in order to value its expertise and interests in the frame of the achievement of the above mentioned priority action lines.

Once the tasks and the working packages are defined, the involved members should coordinate the specific actions **using especially internet and videoconferences**.

Moreover, each member of the group should try to establish and develop useful contacts with external experts, lobbyists and representatives of the EU Institutions or other Organizations (i.e. BSEC) relevant to tourism issues.

A special relation should be followed with the EU Commission's DGs (Regio, Mare, Grow).

Synergies with the CPMR General Secretariat, its working group on Tourism, as well as with the BBSC working group on Business Cooperation, the CPMR Geographical Commissions and external institutions, organizations and institutes are also needed.

SCHEDULE

The Tourism Working Group shall meet regularly, according to current demands imposed by EU and the Balkan & Black Sea agenda.

The group will try to match, as far as possible, with BBSC/CPMR meetings and other tourism specific fora (organizing at least two regular meetings per year, subject to special meetings that may be proposed by the leading Region and the partners of the group).

The working language is **English**.

As a general rule each member of the group will assume the travel and accommodation expenses arising from the attendance to the scheduled meetings. Exception will be made in case of the synergies made with European running projects. In the future, the group should try to find other financial resources to help the regions co-fund their travel costs.



NEXT MEETINGS

1. June 2016 (Kirkklareli, Turkey)
2. November 2016 (Azores, Portugal)

III. ANNEXES

- I. ***Calls for proposals and programmes interesting for the Group***
 - [ENI CBC Black Sea Basin Programme 2014-2020](#)
 - [Balkan-Mediterranean Programme 2014-2020](#)
 - [Danube Transnational Programme 2014-2020](#)
 - [Interreg Europe 2014-2020](#)
 - [Interreg ADRION 2014-2020](#)
 - [HORIZON 2020](#)