

WESTERN BALKANS TOURISM POLICY ASSESSMENT AND RECOMMENDATIONS



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Table of Contents

1. Executive summary	4
2. Introduction	5
3. Tourism in the WB6 economies.....	5
3.1 Analysis of global trends affecting tourism in the western balkans.....	5
3.2 Key tourism indicators in the wb6 economies	8
4. Cross-border tourism and tourism development in the wb6	11
4.1 Albania	16
4.2 Bosnia & Herzegovina	20
4.3 Kosovo*	25
4.4 Montenegro	29
4.5 The Republic of North Macedonia.....	34
4.6 Serbia	39
4.7 Shared issues	41
5 Recommendations	45
5.1 Border crossings and visa facilitation.....	46
5.2 Workforce development and mobility	55
5.3 Data collection and statistics in tourism	62
5.4 Additional recommendations	69
6 Overview of recommendations	70
7 References.....	72
8 Appendix 1 - The United Nations sustainability goals	

1. Executive Summary

This research was commissioned by the Regional Cooperation Council (RCC), through its Triple P Tourism project, in order to make an assessment of the tourism policy issues associated with the development and enhancement of cross-border tourism involving the 6 IPA II beneficiaries in the Western Balkans (WB6).

The research for this project had a number of stages. Firstly, background research was carried out using the websites and published documents from the relevant government departments, tourism agencies and other key bodies in the region, relating to tourism development. This was supplemented with reports from international organisations, previous research commissioned by the RCC and pertinent academic studies of tourism in the WB6.

A workshop was then held during the meeting of the RCC's Tourism Expert Group (TEG) in Sarajevo, where the members of the TEG were asked to consider issues affecting cross-border tourism development in the region, and to give their perspectives on possible solutions that had been adopted elsewhere.

Finally, a series of in-depth interviews were carried out with tourism stakeholders in the region including a balanced sample of public sector, private sector and NGO respondents, all of whom were selected due to their knowledge of, or involvement in, cross-border tourism projects. Some of the quotations from these interviews can be seen throughout the report, where they have been included to illustrate the key points reported by interviewees.

The following report analyses and synthesises the data collected through these stages and is split into 6 substantive sections. Section 2 gives a brief overview to the background of this project. Section 3 provides an overview of key international trends affecting tourism in the WB6, and includes summary data on key indicators for tourism in the region. Section 4 gives an analysis of the issues affecting tourism development in each economy, with an emphasis on the development of cross-border tourism. Section 5 is split into four sections and presents a series of recommendations, best practice case studies, and potential pilot projects for each thematic area of this research. Section 6 gives an overview of the recommendations, clearly showing which of them are vital, desirable or aspirational, indicating the priority that they should be given in the short, medium and long-term.

2. Introduction

This research was commissioned by the Regional Cooperation Council (RCC), through its Triple P Tourism project, in order to make an assessment of the tourism policy issues associated with the development and enhancement of cross-border tourism involving the 6 IPA II beneficiaries in the Western Balkans (WB6).

The RCC's Triple P Tourism project (Promotion, Policy and Pilots) is a €5m, European Union funded initiative, which aims to improve the quality of the tourism offer in the WB6 by: creating joint offer/product(s) to foster regional integration in the tourism sector and its joint global promotion; diversifying the tourism offer of the region; alleviating policy barriers to development of tourism industry and easing of administrative procedures; improving the level of services related to tourism; and supporting small-scale infrastructure projects to support the development of the regional tourism offer/product. It is aligned with the aims of the South East Europe 2020 Strategy which has four interlinked development pillars: integrated growth; smart growth; sustainable growth; inclusive growth and; governance for growth (RCC, 2013). The main themes in cross-border tourism in the WB6 identified by the RCC for analysis in this research were:

- Visa facilitation and border crossings
- Data Collection and Statistics on Tourism
- Workforce development and Mobility
- Sustainable and Responsible Tourism

This document is the final report of the project carried out by the Tourism Research Centre at the University of Greenwich. For this project, background research was carried out to establish the current policy situation for tourism in the WB6 economies, where this relates to cross-border tourism in the region. This included relevant academic, industry and governmental research and publications, as well as information from the national tourism ministries and departments and National Tourism Organisations (NTO).

The major stage of this research was carried out with a wide range of public sector, private sector and NGO stakeholders for tourism in the WB6, through in depth interviews. The first set of interviews were drawn from members of the RCC's Tourism Expert Group (TEG), a steering group for the Triple P Tourism project, drawn mainly from the public sector. In addition, other state and NTO representatives were interviewed to ensure parity of representation. Finally, tour operators and other tourism professionals involved in cross-border tourism in the region were also included in the research.

3. Tourism in the WB6 Economies

3.1 ANALYSIS OF GLOBAL TRENDS AFFECTING TOURISM IN THE WESTERN BALKANS

Tourism is one of the fastest growing global sectors, recording robust growth with new destinations emerging. Western Balkan destinations are gaining popularity. (UNWTO, 2018a; WTTC, 2019)

- Tourism creates 10.4% of the world's GDP and sustains a workforce of 319 million employees.
- In the last decade, the number of international tourist arrivals has increased from 936 million in 2008 to 1,326 million in 2017.
- Europe was the most visited destination, with over 51% of total international arrivals in 2017.
- The majority of Western Balkans destinations reported growth in arrivals of 10% or higher, and some destinations more than double this: Albania (+14.1%), Bosnia & Herzegovina (+18.7%), Kosovo* (+2%), Montenegro (+12.9%), The Republic of North Macedonia (+23.5%), and Serbia (+16.8%). This led to a total of over 12 million visits to the WB6 region in 2018.

Different modes of slow tourism are gaining more importance and reshaping the way people travel and experience destinations. (EC, 2014; UNWTO, 2018b, 2018c, 2019a)

- Walking tourism is becoming increasingly popular among tourists who are interested in nature and authentic local experiences. Walking allows them to engage more directly with local people, nature, and culture, and to meet their needs for physical activity during travel. Walking tourism is relatively easy to develop anywhere as a sustainable tourism offer, combined with other local authentic experiences.
- There is a growing demand for summer mountain tourism activities, due to global warming reshaping the climates in many regions and tourists looking for destinations to escape from the summer heat. Hence, many tourists have been engaging in mountaineering, hiking, and biking during the summer season, especially older people and families.
- More than 40% of international arrivals are considered to be 'cultural tourists,' that is, travellers who participate in a cultural visit or activity as part of their stay. Moreover, the proportion of European tourists having culture or religion as their main motivation has been growing from 6.8% in 2008 to 10% in 2014.

Air connectivity is very important as more than half of total travel is by air. (Poslovni.hr, 2019; UNWTO, 2019a)

- In 2017, 57% of all overnight visitors travelled to their destination by air, demonstrating a gradual increase of 3% compared to 2015.

This designation is without prejudice to positions on status, and is in line with UNSCR 1244 and the ICJ Opinion on the Kosovo Declaration of Independence

- Many destinations have been prioritizing international air connectivity, especially direct lines. Many saw an increase in the number of flights of the low-cost carriers, especially during summer months.
- All regional airports reported an increase in the number of passengers. Belgrade's Nikola Tesla airport is the fastest growing airport in the region with 5.3 million passengers in 2017, a 6% increase compared to the previous year.

Regional political issues impose a threat to the future of tourism. (Frontex, 2019)

- Political issues, illegal migration, and terrorism have already made an impact on the tourism industry worldwide, and especially in the WB6 region.
- The region is historically known for many unresolved political issues that have been the source of tensions between neighbouring economies. Moreover, since 2015, many WB6 economies have also attracted negative attention due to civil protests against governments.
- From 2015, the region became one of the main migratory paths into the European Union, known as the Western Balkan Route. However, the number of illegal border crossings on this route has been falling steadily.

Technological revolution and ICT are unstoppably changing at an increasingly fast rate how tourism industry operates. (Condé Nast Traveller, 2019)

- The technological revolution has created a new era in which travellers use multiple devices daily. With 87% of travellers already using smartphones during the trip, decreasing roaming costs, digital channels, real-time customization, and insights have and will become the norm for consumer interaction before, during and after their stay.
- Online Travel Agencies (OTAs) are enjoying a large share of the global market. In Europe, 70% of hotel bookings originate from OTA searches. However, in recent years, leading OTAs have been forced to delete their parity clauses, giving hotels back their freedom to set prices.
- Cryptocurrencies are promising a universal payment system with no associated fees. From 2019, using cryptocurrencies such as Ethereum, LiteCoin, and Bitcoin to book trips will begin to gain traction, as many tourists wish to avoid foreign exchange rates and commission. Today, 450,000 hotels around the world (including the Marina Bay Sands in Singapore and the Ritz-Carlton in Tokyo) already accept payment in Ethereum cryptocurrency.
- The social media platform Instagram plays an important role in the tourism industry, with the so-called 'Insta-tourism' becoming an important marketing tool. Travelers are beginning to formulate entire trip plans based on photogenic spots captured on this social media platform.

Sustainable tourism development has become an imperative and an industry standard practice. (Treksoft, 2019)

- It has become an imperative for tourism policymakers to ensure tourism's long term and sustainable development on the macro level of destinations, as well as at the micro level of each company that operates within the industry.
- Tourists' expect to see 'green', 'eco', and 'organic'. They also look for ecological tours that educate and share inside information on the area, and how to protect it for the future.
- Individual businesses already assess problems like CO2 emission, pollution, overcrowding, and littering. On an operational basis, modern technologies increase the efficiency of service delivery and facilitate the provision of enhanced consumer experiences.
- The majority of the WB6 economies have incorporated sustainability in their national tourism strategies.

3.2 KEY TOURISM INDICATORS IN THE WB6 ECONOMIES

In this section, we focus on a preliminary analysis of the key tourism indicators for each economy within the WB6 group. We look at international tourist arrivals and their overnight stays, the total number of overnight stays, accommodation facilities, and tourism and hospitality employees.

3.2.1 Key indicators of tourism in the WB6 economies

- In the period 2014-2018, all WB6 economies reported growth in international tourist arrivals and overnight stays by international tourists.
- For all economies, most visits occur during summer. However, Albania and Montenegro are exemplars of the so-called sun and beach tourism destinations, with high seasonality and the majority of arrivals and overnight stays recorded between June and September. These two economies also have the highest number of tourist arrivals and overnight stays in the region, which can be attributed to their status as summer destinations.
- The Republic of North Macedonia and Serbia are the only two economies reporting more of their overnight stays as being attributed to domestic tourists. In 2018, domestic tourists made 53% of all overnight stays in The Republic of North Macedonia, and 60.8% of all overnight stays in Serbia. In comparison, only 96.3% of all overnight stays in Montenegro were made by international tourists.
- Kosovo* and The Republic of North Macedonia are the only two economies yet to reach the threshold of one million tourist arrivals.
- According to WTTC, in the period 2014-2018, most economies have had an increase in employees in the tourism and hospitality industry. However, Serbia and Kosovo* have reported a decrease in tourism's contribution to employment.
- In 2017, tourism directly contributed more than 90 000 jobs in Albania, while its total contribution (including indirect employment) was estimated at 291 000. This accounts for almost 25% of total employment. WTTC forecasts that tourism will indirectly contribute to 316 000 jobs in Albania by 2029.

Key tourism indicators for all WB6 economies are presented below in Table 1.

Table 1 - Key tourism indicators by economy, 2014-2018

		2014	2015	2016	2017	2018
Albania	International tourist arrivals (in mio)	3.673	4.131	4.736	5.118	5.927
	International overnight stays (in mio)	19.467	20.796	28.958	NA	NA
	Total overnight stays (in mio)	NA	NA	NA	NA	NA
	Accommodation establishments					
	Units	836	905	1,242	NA	NA
	Rooms	15 081	12 986	17 692	17 041	NA
	Beds	32 879	29 903	41 376	52 925	NA
	Tourism/hospitality employees					
	Direct in '000	76.1	79.2	89.8	93.4	NA
Total (direct + indirect) in '000	234.7	246.0	277.2	291.6	286.7	
Bosnia and Herzegovina	International tourist arrivals (in mio)	0.536	0.678	0.739	0.923	1.052
	International overnight stays (in mio)	1.088	1.425	1.563	1.913	2.165
	Total overnight stays (in mio)	NA	NA	2.384	2.677	NA
	Accommodation establishments					
	Units	NA	NA	NA	NA	NA
	Rooms	NA	NA	NA	NA	NA
	Beds	NA	NA	NA	NA	NA
	Tourism/hospitality employees					
	Direct in '000	19.4	20.3	22.5	23.2	23.8
Total (direct + indirect) in '000	68.5	71.1	79.2	81.3	83.6	
Kosovo*	International tourist arrivals (in mio)	0.061	0.079	0.164	0.162	NA
	International overnight stays (in mio)	0.102	0.121	0.132	0.145	NA
	Total overnight stays (in mio)	0.157	0.202	0.194	0.193	NA
	Accommodation establishments					
	Units	NA	NA	495	NA	453
	Rooms	NA	NA	6 936	NA	6 806
	Beds	NA	NA	10 985	NA	10 710
	Tourism/hospitality employees					
	Direct in '000	10.5	13.0	11.9	NA	NA
Average monthly salary (gross) in €	265	252	251	NA	NA	
The Republic of North Macedonia	International tourist arrivals (in mio)	0.425	0.486	0.510	0.631	0.707
	International overnight stays (in mio)	0.923	1.036	1.054	1.295	1.492
	Total overnight stays (in mio)	2.196	2.394	2.461	2.775	3.177
	Accommodation establishments					
	Units	NA	NA	NA	NA	NA
	Rooms	27 422	27 812	28 305	28 759	29 702
	Beds	71 255	72 021	73 168	74 257	76 558
Tourism/hospitality employees						

	Direct in '000	10.4	11.2	11.0	11.8	12.3
	Total (direct + indirect) in '000	38.7	41.5	41.7	44.6	46.2
Montenegro	International tourist arrivals (in mio)	1.350	1.560	1.662	1.877	2.077
	International overnight stays (in mio)	8.597	10.307	10.528	11.470	12.444
	Total overnight stays (in mio)	9.554	11.055	11.250	11.953	12.930
	Accommodation establishments					
	Units	320	317	348	370	NA
	Rooms	66 071	67 066	68 558	19 112	NA
	Beds	159 347	164 004	166 842	45 733	NA
	Tourism/hospitality employees					
	Direct in '000	15.2	14.5	14.3	14.4	15.0
	Total (direct + indirect) in '000	31.2	32.6	33.8	36.4	39.2
Serbia	International tourist arrivals (in mio)	1.029	1.132	1.281	1.497	1.711
	International overnight stays (in mio)	2.161	2.410	2.739	3.175	3.658
	Total overnight stays (in mio)	6.086	6.652	7.534	8.325	9.336
	Accommodation establishments					
	Units	NA	NA	NA	919	NA
	Rooms	NA	NA	NA	44 813	NA
	Beds	NA	NA	NA	106 029	NA
	Tourism/hospitality employees					
	Direct in '000	35.5	37.8	38.1	36.8	35.7
	Total (direct + indirect) in '000	92.6	97.5	99.2	96.7	94.6

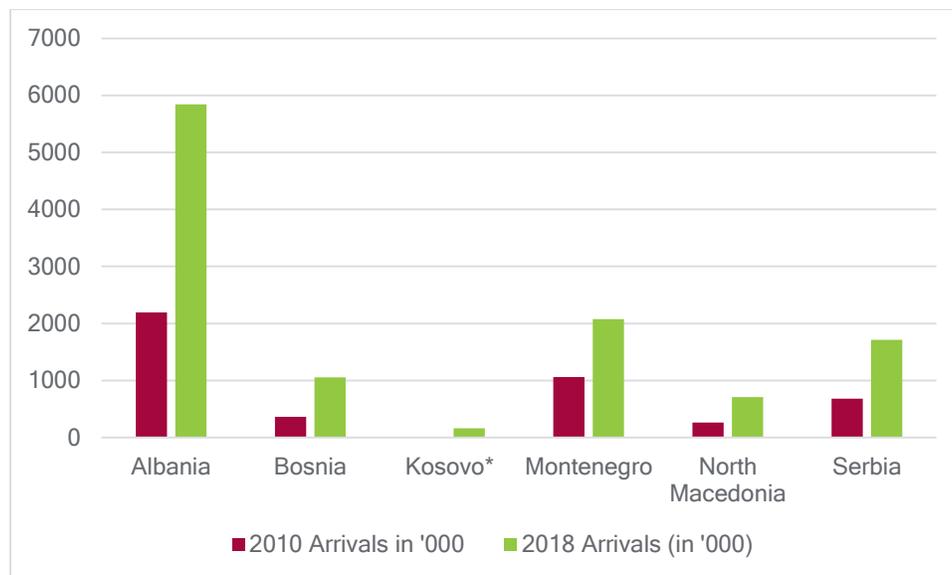
4. Cross-border tourism and tourism development in the WB6



Taken as a whole, tourism to the WB6 economies is showing steady growth year-on year, with significant growth over the decade, shown in figure 1, below.

Figure 1 - Growth in international arrivals to the WB6 economies.

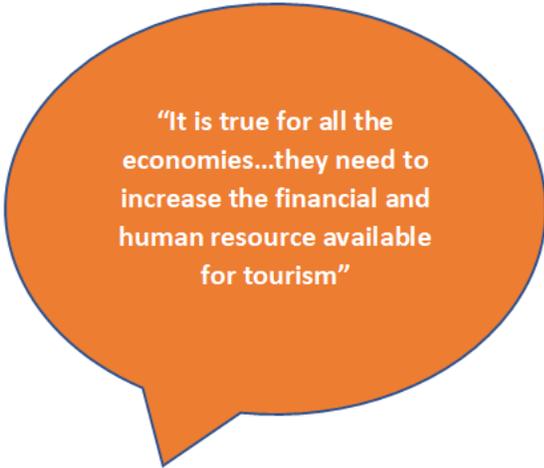
Source: UNWTO (2019b)*



comparable data is not available for Kosovo - this shows 2017 arrivals from national statistics

This growth has been the result of significant improvements in destination branding and marketing, as well as in product development, with a strong focus on specific tourism segments. Products are diverse across the region, although all destinations offer a wealth of cultural and natural resources to visitors, with most economies emphasising this in their tourism strategies and policies, and in their marketing. Products linked to the natural environment, food and culture in the Balkan region have been identified as both sustainable and as offering strong opportunities for growth (Smith, et al. 2016). Alongside this shared emphasis, Serbia is developing an emphasis on urban tourism through Belgrade as a regional hub and Novi Sad, which will be European Capital of Culture in 2021. Albania and Montenegro also both have a strong mass tourism offer, with a traditional sun, sea and sand (3S) product (Horwath HTL, 2018).

Tourism is one of most significant sectors for growth across the WB6 (Balkan Forum, 2017). However, the Organisation for Economic Competitiveness and Development (OECD) have

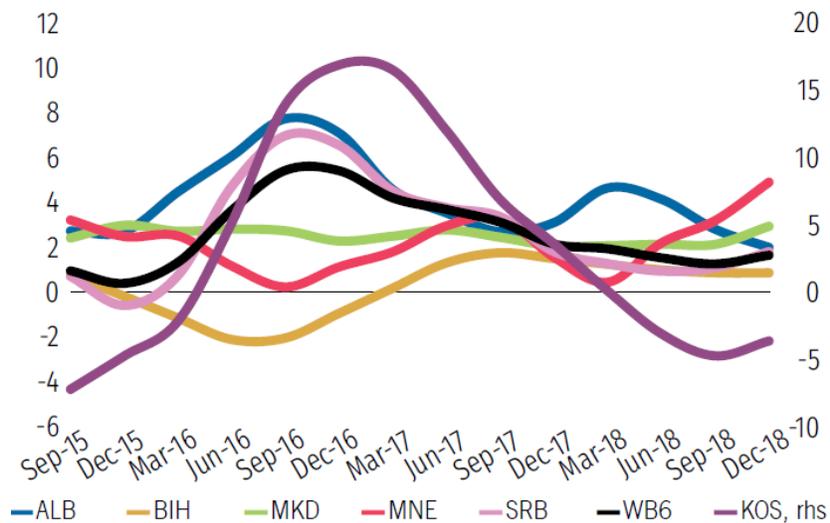


identified that further growth and enhanced competitiveness for tourism in the region is being held back by low levels of public sector funding for cultural and natural heritage tourism, which do not normally benefit from the inward investment of mass tourism operators, skills deficits in the sector and the need for more effective institutions for tourism, including new mechanisms for developing stronger links with the private sector (OECD, 2018). Tourism skills deficits in the region need to be seen in the context of broader human capital trends in the WB6, with slowing employment growth reflecting a lack of

private sector dynamism, exacerbated by significant emigration amongst the region’s younger population.

Tourism can make a contribution to improving employment growth, as services are the fastest growing sector in most of the WB6 economies and tourism can create jobs both directly and indirectly. For example, 11% of all new jobs created in Bosnia & Herzegovina in 2018 were related to tourism. Tourism also makes a significant contribution the balance of payments of in the region, as an export industry. For example, net exports rose 0.6 to 20.4% of GDP in 2018, due to a rise in tourism receipts (Word Bank, 2019). On average, tourism accounts for 24.1% of exports in the WB6 (RCC, 2018a).

Figure 2 - Year on Year Employment growth in the WB6, percent. Source: World Bank (2019)

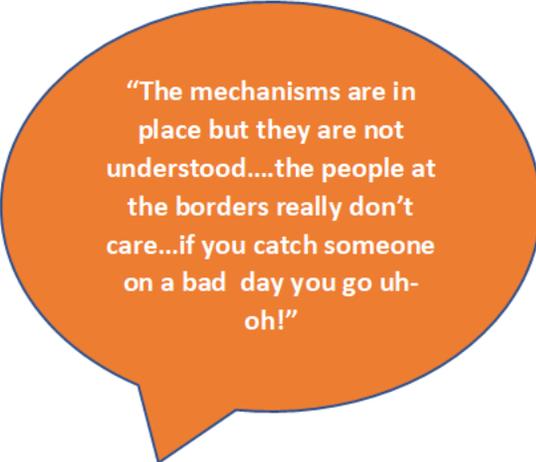


Tourism significantly contributes to the labour market in all the WB6 economies. However, the industry has been flagged as being highly sensitive to skills gaps. This remains one of the main challenges for tourism and hospitality businesses. This is due to: temporary engagement of employees with the industry; a lack of employees with sufficient knowledge in foreign languages and professional industry standards; a lack of interest of young students in

tourism-related education and; the negative image of the industry due to low wages, seasonality issues and unsustainable working conditions.

Most of the WB6 economies recognize sustainability as the prerequisite for tourism development. In most economies, the valorisation of cultural and natural heritage has been proposed as the main approach to tourism development. This suggests that the tourism industry has a valuable contribution to make to sustainability initiatives in the region. The exceptions to this are Montenegro and Albania, where the rapid growth of 3S tourism will not necessarily lead to long-term sustainability. Both of these economies are addressing this in their tourism strategies, which now place greater emphasis on developing inland tourism. Sustainability, in particular environmental sustainability, has been repeatedly identified as a significant brake on development in the region, including on its future prospects for future European integration (Ahn et al., 2009; Civil Society Forum, 2018).

All WB6 economies have reported growth in air passenger activity, which is evidenced by the increase in international tourist arrivals. Many economies have benefitted from the growth of low cost carriers (LCC) and have established good connections with the rest of Europe. However, connectivity in the region is still recognised a vital area for future tourism development, with tourists and operators being over-reliant on road transport and complex domestic flight arrangements. A lack of priority and investment in rail across the region (Okanao-Heijmans, 2018) is affecting the growth of cross-border tourism for both independent travellers and organised groups.



“The mechanisms are in place but they are not understood....the people at the borders really don’t care...if you catch someone on a bad day you go uh-oh!”

Visa facilitation and the ease of border crossings have been consistently identified in previous research as a key issue affecting cross-border tourism in the WB6. International tourism relies on the ability of individuals to travel freely from their own countries to the destinations that they choose to visit. In the WB6, issues of borders, border control and mobility are particularly prominent in discussions of regional tourism development due to the persistence of territorial disputes linked to conflicts and the existence of the so-called ‘Balkan route’ for international migration into the European

Union. As well as these high-level issues, it is important to note that the decision of whether or not to admit a tourist to a destination is ultimately in the hands of individual border officials at points of entry (UNWTO 2014). The importance of visa regimes is exemplified in the region by Serbia’s decision to allow visa-free travel for Chinese tourists, leading to a 254% growth in visits (ETC 2018). The World Economic Forum (2018) suggest that global trusted-traveller schemes, regional e-visa agreements and data-sharing between economies will increase in frequency over the coming decade as destinations seek to ease access for travellers, including leisure and business tourists, and the process of European integration for WB6 economies will also require greater cooperation on border and visa issues.

To address all of these areas in the context of future developments in the tourism industry through cross-border tourism initiatives, an increased level of regional cooperation is required. Although the RCC continues to promote and support regional cooperation, this is an area identified as a priority for economic growth and sustainable development in the region. Successful cross-border tourism initiatives such as the Via Danirica, Peaks of the Balkans and Balkan Hiking Adventure show the potential for tourism development around shared themes and routes. Improvements in this area will not only lead to reconciliation and stabilisation in a post-conflict region, but also to an enhanced business environment where networks, agreements and partnerships and a stable environment for foreign direct investment will lead to accelerated business growth, including in tourism (Civil Society Forum, 2018b). Recently, the mismatch between the growth of tourism arrivals and the development of the regional tourism industry in the WB6, has been analysed in terms of 'institutional voids' (Lehmann & Gronau, 2019), which lead to a lack of appropriate services and infrastructure

being provided for tourism. This institutional weakness are particularly key for small tourism businesses in the region, who can struggle to access targeted support and funding, and find it difficult to access decision makers and to join partnerships (Sanfey & Milatovic, 2018). These voids will also, in the long term, affect the tourist experience in the WB6 and lead to problems with its image as a destination as tourists return unsatisfied from a region which has yet to fulfil its potential as a tourism destination.



Government is always pushing the projects with the big companies, but the strengths in tourism in the region lie in the small companies



If most of your grants are going directly to NGOs...this keeps happening with EU money...you're not developing a sector at all

The following sections of this research analyse the context for the development of cross-border tourism in the WB6, with a focus on the key thematic areas of:

- Visa facilitation and border crossings
- Data Collection and Statistics on Tourism
- Workforce development and Mobility
- Sustainable and Responsible Tourism

4.1 ALBANIA

Albania has a very strategic position: it is situated between Montenegro and Greece, at the meeting place of the Adriatic and the Ionian Sea. It has established good transport connectivity with Europe; however, most international arrivals (64%) are from four neighbouring economies: Kosovo* (34%), The Republic of North Macedonia (13%), Greece (10%) and Montenegro (7%). This implies a strong dependency on regional visits made by land. Visitors from all neighboring economies were granted visa-free entry to Albania using either a valid passport or ID.

4.1.2. Ease of Border crossings

The following border crossing by land experience a significant number of foreign citizens visiting Albania:

- Morinë, between Albania and Kosovo*, accounts for 40 % of all border crossings. It is the biggest border crossing between the economies. There is also Orgjost, which is for pedestrian crossing only.
- Muriqan, between Albania and Montenegro, accounts for 12 % of all border crossings. This border connects Albania with Ulcin. There are three more planned border crossings between the economies.
- Qafë Thanë, between Albania and The Republic of North Macedonia, accounts for 7% of all border crossings.
- Kakavijë and Kapshticë, between Albania and Greece, together account for 8% of all international border crossings. Sopik and Rips are two smaller border crossings for pedestrians only.

Albania is less than 100 km from Italy and has good sea connectivity with the Italian cities, Ancona and Bari, using the Port of Durrës. Almost 7% of all international arrivals are from Italy, and the port of Durrës yearly accounts for more than 163000 international tourist arrivals that add 3% to the overall border crossings.

Table 2 - Arrival of foreign citizens in Albania by border crossing in 2017 Source: INSTAT (2018)

Border point	Arrivals of foreign citizens	Arrivals of foreign citizens (in %)
Bllatë (The Republic of N. Macedonia)	83 576	2%
Kakavijë (Greece)	235 900	5%
Qafë Botë (The Republic of N. Macedonia)	158 680	3%
Kapshticë (Greece)	177 685	3%
Qafë Thanë (The Republic of	342 543	7%

N. Macedonia)		
Morinë (Kosovo*)	2 051 970	40%
Hani i Hotit (Montenegro)	279 149	5%
Muriqan (Montenegro)	631 523	12%
Durrës (port)	163 575	3%
Sarandë (port)	201 411	4%
Rinas (airport)	589 592	12%
Other	202 098	4%
Total	5 117 700	100%

With 29 direct flight routes, the Albanian capital city of Tirana is less than 2-3 hours away from most European centers. Foreign citizens entering Albania through Rinas make up an average of 12 % of total arrivals (see Table 3).

Table 3 - Arrival of foreign citizens to Albania by mode of transport, 2014-2017. Source: INSTAT (2018)

Mode of transport/Year	2014 (in '000)	2015 (in '000)	2016 (in '000)	2017 (in '000)
By air	337	401	457	578
By sea	202	215	279	396
By land	3 134	3 515	3 999	4 144
Total	3 673	4 131	4 735	5 118

Since June 2014, Albania has been an official candidate for accession to the European Union. However, Albania and Kosovo* were in talks for an agreement that would see the elimination of official border crossings between the two economies on 2 April 2019. EU officials were opposing these talks with strong suggestions that such an agreement would decrease Albanian aspirations for accession to the EU. This made Albania withdraw from further talks.

4.1.3 Visa regime for foreign visitors

The visa regime for foreign citizens is provided by Law No. 108/13 “On foreigners” and by the Decision of the Council of Ministers No. 569, dated 03.10.2018, on some additions and amendments to the Decision no. 513/13 of the Council of Ministers “On the definition of the criteria of procedures and documentation for entry, stay and treatment of foreigners in the Republic of Albania.”

According to the Albanian Ministry for Europe and Foreign Affairs, entry on a visa-free basis is granted to:

- Foreign citizens who have a valid, multiple-entry Schengen visa, which has been previously used in one of the Schengen states, or foreign citizens who have a valid permit of stay in one of the Schengen states, and

- Foreign citizens who have a valid, multiple-entry US or UK visa, which has been previously used in the respective country of issuance, or have valid permit of stay in the US or UK.

Some economies were identified as part of a group which benefits from the summer season visa waiver for tourism reasons. Hence, entry on a six months visa-free basis is granted to:

- Foreign citizens from Saudi Arabia, Belarus, Qatar, Oman, Russia, Thailand, and Bahrain, for a short term stay, with a passport document; and
- Foreign citizens from The Republic of China, for a short-term stay, with a passport document.

For foreign visitors from WB5 economies, the following regime applies:

- For Bosnia and Herzegovina, Kosovo*, The Republic of North Macedonia and Montenegro, visa-free entry with a valid passport or ID;
- For Serbia, visa-free entry with a valid passport only.

4.1.4 Data collection and statistics on tourism

Data collection and statistics on tourism are the responsibility of the Institute of Statistics of Albania (INSTAT), where work has begun for the construction of Tourism Satellite Accounts. In 2018, INSTAT, in cooperation with the Bank of Albania, drafted a special publication of the main indicators on tourism in Albania. This publication is first of its kind, and it refers to the period from 2013-2017. Data was provided from various ministries, e.g., Ministry of Tourism and Environment, Ministry of Internal Affairs, the Bank of Albania and National Accounts.

At the moment, there is no data available on the length of waiting time at the border crossings, and the availability of special border crossing requirements for specific tourism groups such as outdoor adventure travellers are not available.

4.1.5 Workforce strengthening and mobility

According to Horwath HTL (2018), at 19% of the total population, Albania has the highest percentage of 15-24-year olds in Europe. This favourable demographic structure, paired with significantly lower wage levels than those in Western Europe, create a significant upside potential for labour-intensive investments.

However, the hospitality industry has been flagged as one of the most sensitive sectors regarding skills gaps (European Training Foundation, 2014). According to the ETF's (2014) report 'Skills for Albania 2020', 16 out of every 25 vacancies in the hospitality industry are assessed to belong to very difficult or relatively difficult vacancies to be filled.

One of the main challenges for tourism and hospitality businesses, which constitute 46% of SMEs, is the only temporary engagement of employees with the industry, with many being university students that aim to finish their studies in economics or business

management/administration and only look for temporary summer jobs. Also, the majority of those looking to work in tourism widely lack the knowledge of the UNWTO's Code of Ethics and other behavioural skills that are very important for their relation with clients.

To address the skills gap, the Government has committed to transform the economy to become more competitive, innovative, and flexible. Measures for addressing workforce issues in the hospitality industry were acknowledged in the National Employment and Skills Strategy 2014-2020.

4.1.6 Sustainable tourism

Sustainability has been recognized by the Albanian Government as one of the main prerequisites for tourism development.

Moreover, with the economy as a strong contender for the accession to the EU since June 2014, the Government has developed and accepted ten different strategies: the National Strategy for Development and Integration 2015-2020, National General Plan 2015-2030, Integrated Coastal Zone Inter-Sectoral Plan, Strategies for Biodiversity Protection, Inter-Sectoral Strategy Albania's Digital Agenda 2015-2020, Inter-Sectoral Strategy for Rural and Agricultural Development 2014-2020, Transport Strategy, Culture and Cultural Tourism Strategy, Business and Investment Development Strategy 2014-2020, and Strategy for Integrated Border Management (Ministry of Tourism and Environment, 2018). All these strategies address different aspects of sustainable tourism development but focus on those elements most relevant for their specialty area.

The main document is the National Strategy for Development and Integration 2015-2020, in which the Government set the following goals:

- The need for greater integration of tourism planning and tourist destinations,
- Address weaknesses related to the range and quality of tourism products,
- Develop a more favourable legal and institutional environment for the absorption of domestic and foreign private investors,
- The need for a more comprehensive and strategic approach to tourism development in Albania, ensuring sustainability and providing income and employment opportunities, and
- The need for the adoption and implementation of the National Cross-Sectoral Tourism Strategy.

The National Strategy for Development and Integration 2015-2020 provides with the vision for tourism in Albania as "*an attractive, authentic, hospitable tourism destination in Europe based on the sustainable use of natural, cultural and historical resources, easily accessible from international markets.*"

Two strategic objectives for tourism are foreseen in this Strategy:

- Developing sustainable tourism to contribute to economic development and employment through improved attitudes towards international visitors and modest growth of immigrants and ethnic Albanians; increasing the direct tourism contribution to GDP; and increasing the direct contribution of tourism to employment, and
- Creating an integrated, cultural, natural and coastal tourism model through the development of a "Branding Albania" strategy with a unified logo and slogan for investment in tourism; adoption and implementation of the "National Strategy for Tourism Development"; development and implementation of a National Tourism Development Plan, integrated with the National Territorial Plan; and the creation of new cultural, natural and coastal tourism products.

Fiscal incentives in place: The Government has started to implement active policy measures to stimulate the tourism industry. The most recent being the changes to tourism law as of December 2017 (Law No. 114/2017) enabling a set of fiscal incentives that would enable implementation for strategic investments in the tourism sector as of 1 January 2018. With this fiscal incentive, all newly constructed four and five-star hotels will benefit from exemptions to tax on profits for ten years and will not pay infrastructure tax while the Value Added Tax (VAT) will be reduced to six percent (Horwath HTL, 2018).

Promoting culture through tourism: In the 2017-2021 mandate, the Government set the priority to maintain and improve quality standards in cultural products, intensify investment in this sector, independence of the cultural scene from public structures (including funding sources and public-private partnerships) and the use of culture as a source of economy and tourism.

Priority will be given to the combination of cultural tourism with agrotourism through the Rural Renaissance program that will aim at the restoration of villages with historical potential such as QH Rehovo, QH Theth, QH Dhërmi, QH Vuno, QH Përmet.

New tourist routes of cultural character such as 'Roads of Trust', old historical and commercial corridors such as Via Egnatia will be promoted, combining cultural heritage, culinary and craftsmanship. 'Memory Streets' are also a unique route of Albania that will continue to highlight the historical and educational aspect of the sites of former dictatorships such as Spaci or Tepelena, following the already well-known museum memorial projects.

4.2 BOSNIA & HERZEGOVINA

4.2.1 Ease of border crossing

Bosnia and Herzegovina is situated between Croatia, Montenegro, and Serbia. It has limited access to the Adriatic Sea, with Neum as its only coastal town. It has established good transport connectivity with Europe as many strategic transportation routes pass through the territory.

According to the Ministry of Security of Bosnia and Herzegovina (2018), there are 83 border crossings, of which 55 are classified as international and 28 for cross-border mobility. The latter are the result of a special agreement between Croatia and Bosnia and Herzegovina, established to ease the border crossing for economic, social or family related reasons, and are opened for a limited time of the day (from 6 am to 10 pm).

An interactive map of all border crossings and their characteristics can be found at <http://www.granpol.gov.ba/interactivemap/>.

In 2017, 48.3% of international overnight stays were from Croatia (11.8%), Serbia (8.1%), Turkey (7.3%), Italy (7%), Slovenia (5.3%), UAE (5.3%) and Poland (4.8%). Having almost 20% of all overnight stays made by two neighbouring economies, implies strong transit by land.

There are four airports in Bosnia and Herzegovina: in Sarajevo, Banja Luka, Tuzla and Mostar, which together accounted for 769 347 arrivals in 2017. In general, air transport in Bosnia and Herzegovina has been increasing, almost doubling its growth in arrivals from 2013 to 2017. However, more passengers use airlines to exit the economy than to enter it (see Table 4). Additionally, direct flights to more than 20 destinations can be made from the airports, with Sarajevo's airport offering direct flight connections to 13 destinations: Zagreb (Croatia), Vienna (Austria), Ljubljana (Slovenia), Belgrade (Serbia), Istanbul (Turkey), Dubai and Sharjah (UAE), Oslo (Norway), Munich and Cologne (Germany), Zurich (Switzerland), Copenhagen (Denmark) Stockholm (Sweden).

Table 4 - Arrivals of air passengers, 2013-2017. Source: Mujić (2018)

Activity/Year	2013	2014	2015	2016	2017
Arrivals	399 473	474 605	556 491	605 338	769 347
Exits	403 457	481 722	572 904	618 206	785 516
Total	802 903	956 327	1 129 395	1 223 544	1 554 863

4.2.3 Visa regime for foreign visitors

The visa regime for foreign citizens is provided by the Law of Border Control.

According to the Ministry of Security of Bosnia and Herzegovina, 90 days entry on a visa-free basis, using a valid passport or ID card, is granted to:

- Foreign citizens of the member states of the European Union and the economies signatories to the Schengen Agreement, and
- Foreign citizens of Andorra, Montenegro, Liechtenstein, Monaco, San Marino, Serbia, Vatican, and the Swiss Confederation.

For foreign visitors from WB5 economies, the following applies:

- For Albania, Montenegro, The Republic of North Macedonia, and Serbia, a 90 days visa-free entry is granted with a valid passport or ID,
- For Kosovo*, all citizens need to apply for a visa. In 2017, 754 visas were issued to citizens of Kosovo*, which is an increase of 2.72% from 2016.

Among all visas issues in 2017 (28 751 visas in total), 50.6% were for citizens from Saudi Arabia and 17.7% for Lebanon. A very significant increase of 15.1% in issued visas can be observed for Chinese citizens in 2017 compared to the previous year, despite them accounting for less than 2% of all visas issued in 2017.

4.2.4 Data collection and statistics on tourism

Data collection and statistics on tourism are the responsibility of three statistical institutes within Bosnia and Herzegovina. These are the Agency for Statistics of Bosnia and Herzegovina at the level of the state, the Federal Office of Statistics for the Entity of Federation of Bosnia Herzegovina and the Republika Srpska Institute of Statistics for the Entity of Republika Srpska.

In addition to the three statistical institutions, the Central Bank of BiH compiles monetary and balance of payments and financial statistics.

At the moment, tourism statistics are published as short reports on a monthly or yearly basis, focusing on either monthly or cumulative data for a specific period.

At the moment, there is no data available on the length of waiting time at the border crossings, and the availability of special border crossing requirements for specific tourism groups such as outdoor adventure travellers are not available.

4.2.5 Workforce strengthening and mobility

In Bosnia and Herzegovina, tourism is the sector that has recorded the largest increase in new employment in recent years. In 2017, it accounted for 37612 employees, of which 45% were women.

However, the hospitality industry has been flagged for employees lacking in training and education for the industry-specific skills (Mlinarević, Perić, et al., 2008).

In 2017, only 6% of all working permits issued to foreign citizens were for jobs in the hospitality industry (Ministry of Security of Bosnia and Herzegovina, 2018).

4.2.6 Sustainable tourism

Sustainability has been recognized in the Strategy of tourism development for the Federation of Bosnia and Herzegovina 2008-2018. Two main goals were set:

- For tourism development to be significantly informed by sustainability principles, to respect the interest and needs of residents; and
- To build a positive international image and tourism destination image of Bosnia and Herzegovina.

In a more recent document, Strategic Framework for BiH, the Council of Ministers, Directorate for Economic Planning (2015), has identified four development areas within the targets adopted for the South East Europe 2020 Strategy. These areas are interlinked and set the objectives for BiH to develop as follows:

- Integrated growth through the promotion of regional trade and mutual investments and development of non-discriminatory and transparent trade policies;
- Smart growth represents innovations, digitalization, and youth mobility, as well as the Government's commitment to competitiveness based on quality rather than based on low labour price;
- Sustainable growth is focused on balanced regional development and improved resource efficiency and sustainability as support to enhancing social and economic self-sustainability and creating better conditions for local growth and employment;
- Inclusive growth aims to enhance employment through skills development, inclusive participation in the labour market, inclusive and improved quality of health services and reduction of poverty;
- Governance for growth means administration capacity building to apply the principle of good governance at all levels, strengthen the rule of law and combat corruption to create such business environment and public services that are needed to boost economic and social development.

The Framework places great emphasis on culture. It sees culture in the role of identity building through the reconstruction of cultural heritage, which is very important and specific for BiH. Hence, the suggestion for public policies that regulate economic development is to aim at stimulating the development of culture and cultural industries, establishing a system to facilitate the creation of cultural districts, developing cultural tourism and subsidizing companies producing cultural goods and providing cultural services, i.e., subsidizing the cultural industry.

With regards to rural regions' development, culture can concretely support local, sustainable development through cultural tourism. Tourism is often mentioned as a rescue strategy for the BiH economy. Diverse investments in tourism in BiH implies support for different forms of tourism:

- Cultural tourism based on history, tangible heritage (crafts, tradition) and tourism-based on ethnic gastronomy products;

- Outdoor/adventure tourism, ecotourism, interest for folklore, crafts, spa and wellness tourism - these are only some of the types of cultural tourism which can be developed in BiH;
- Tangible cultural heritage is highlighted as a good starting base and an instrument of local development in BiH due to the rich heritage that can be found everywhere and due to compatibility with the development of cultural tourism;
- SME driven promotion of tangible cultural heritage is enabling development based on local specificities and characteristics of the region.

Hence, the following priorities were set:

- Strengthen the sector of cultural industries
- Strengthen the role of culture in the economic development of BiH; and
- Create a map activities for cultural tourism development.

4.3 KOSOVO*

4.3.1 Ease of border crossing

Kosovo* is situated between Albania, Bulgaria, Montenegro, The Republic of North Macedonia, and Serbia. Kosovo* unilaterally declared independence from Serbia in 2008, and since gained diplomatic recognition as a sovereign state by 102 United Nations member states. Serbia (with Republika Srpska in BiH) does not recognize Kosovo* as a sovereign state, although with the Brussels Agreement of 2013, it has accepted its institutions.

In 2017, 48.3% of international overnight stays was from Albania (15.2%), Germany (10.5%), Turkey (8%), and Switzerland (8.2%). Five WB economies account for 27% of all international overnight stays, with most originating from Albania, followed by The Republic of North Macedonia and Serbia.

Moreover, in 2018, more than 3.7 million international arrivals are made through four neighbouring economies, with most arrivals made from Serbia. However, among entries made by citizens of neighbouring economies, most were made by citizens of The Republic of North Macedonia (37%), Albanians (35%) and Serbians (22%) (Kosovo* Agency of Statistics, 2019). This implies strong transit by land.

Kosovo* has two airports: the Gjakova Airport and the International Airport Adem Jashari of Pristina. The Gjakova Airport was built by the Kosovo* Force (KFOR) and was used mainly for military and humanitarian flights. The Government plans to offer the airport for operation under a public-private partnership that would gradually turn it into a civilian and commercial airport.

On the other hand, the Pristina International Airport is an international airport offering the only point of entry for air travellers to Kosovo*. In 2017, it accounted for almost a million inbound passengers and it was tipped to exceed two million total passengers in the next two years. However, more passengers still use airlines to exit Kosovo* than to enter it (see Table 5).

Table 5 - Activities by air passengers, Pristina International Airport, 2013-2017. Source: Kosovo Agency of Statistics (2018, p. 195)*

Activity/Year	2013	2014	2015	2016	2017
Arrivals	794 179	697 268	767 475	855 459	923 006
Exits	834 499	707 507	781 723	891 743	926 130
Total	1 628 78	1 404 775	1 549 198	1 747 202	1 885 136

4.3.2 Visa regime for foreign visitors

According to the Ministry of Foreign Affairs of Kosovo*, a 90 days visa-free entry is granted with a valid passport or ID to:

- Foreign citizens of the European Union and Schengen Zone Member States, and
- Foreign citizens from the Vatican, Andorra, Monaco, and San Marino.

Entry to Kosovo* for up to 15 days is granted without the required visa for the following:

- Foreign citizens of the economies which are required to obtain a visa for Kosovo* but hold a biometric valid residence permit issued by one of the Schengen member states or a valid multi-entry Schengen Visa,
- Foreign citizens holding travel documents issued by the EU Member States, Schengen zone States, USA, Canada, Australia and Japan based on the 1951 Convention on Refugee Status or the 1954 Convention on the Status of Stateless Persons.

Entry without obtaining a visa is granted to:

- Holders of valid travel documents issued by Special Administrative Regions of the People's Republic of China: Hong Kong and Macao,
- Holders of travel documents issued by Taiwan provided that they preliminarily notify the Diplomatic or Consular Mission of the Republic of Kosovo* of their arrival, at least two weeks in advance.

For foreign visitors from WB5 economies, the following applies:

- For Albania, Montenegro, The Republic of North Macedonia, and Serbia, a 90 days visa-free entry is granted with a valid passport or ID;
- For Bosnia and Herzegovina, all citizens need to apply for a visa.

4.3.3 Data collection and statistics on tourism

Data collection and statistics on tourism are the responsibility of the Kosovo* Agency for Statistics. In 2017, the Agency began cooperating with the Kosovo* Police to collect data on border crossing points with the purpose to develop the baseline for collecting the data in future. These data include number of visitors by the purpose of travel, age and length of stay, number of individual and repeated visits by the purpose of travel, and entries from neighbouring economies by citizens of the neighbouring economies and other international travellers.

At the moment, tourism statistics are published in the Statistical Yearbook. Moreover, the Kosovo* Agency of Statistics almost completely covers the territory of Kosovo* and offers an interactive database of tourism data and statistics. However, depending on the presentation of data, complex analysis is often limited. Moreover, the Government identifies printed and electronic information about tourist sites, attractions, and products and services available as very limited or almost non-existent. Moreover, there is no information available to the

community and tour operators about potential tourism products in rural and mountain areas that can be offered to tourists.

At the moment, there is no data available on the length of waiting time at the border crossings, and the availability of special border crossing requirements for specific tourism groups such as outdoor adventure travellers are not available.

4.3.4 Workforce strengthening and mobility

According to the World Bank, Kosovo* has the highest unemployment rate in the region, at 28%. Most people have been unemployed for a long period, aged between 25 and 54 years, and with a technical or vocational degree.

In Kosovo*, the hotel and restaurant activity accounted for 74.4 million EUR in 2017, which represents 18.7% of exports in services. However, the sector adds 1.2% to the GDP and employs only 6% of the total workforce in the economy (Kosovo* Agency of Statistics, 2018). Moreover, the occupancy rate of hotels in 2018 was only 13%.

All this testifies to the increasing struggles of the tourism and hospitality industry in Kosovo*. In general, tourism is not perceived as a priority sector in Kosovo*, with most tourism activities supported by donors and without adequate institutional coordination. According to the Kosovo* Government (2016), despite positive trends in recent years, available tourism products and services remain limited. There are still very few tourist offers with mountain and rural tourism or cross-border tourism. However, with the natural and cultural heritage of Kosovo*, cultural tourism, mountain and alpine tourism, rural tourism, ecological and alternative tourism, active tourism, cross-border trips, and meetings and conferences were identified as the main pillars for the development of Kosovo*'s tourism products.

4.3.5 Sustainable tourism

Sustainable tourism does not have a strategic platform/document *per se*. However, it was recognized by the Ministry of Culture, Youth and Sport in the National Strategy for Cultural Heritage 2017-2027.

Strategic goals informed by sustainability are (Kosovo* Ministry of Culture, Youth and Sport, 2016):

- An integrated approach to protection according to the principles of sustainable urban, economic, social and cultural development planning,
- Effective and inclusive preservation and management of cultural heritage assets as a precondition for sustainable development,
- Inclusion of cultural heritage into the sustainable development agenda, and
- Creation and association on the platforms of cooperation.

The Strategy places great emphasis on culture and cultural tourism. It supports the continuous working process of the Kosovo* Government for promotion of cultural heritage

and cultural tourism in the economy and abroad. Measures are mainly focused on the creation of mechanisms for systematic and thematic cooperation at the national: inter-ministerial, inter-municipal and inter-institutional level, as well as at the regional level, with a focus on cross-border cooperation. Furthermore, the Strategy posits that the development of cultural tourism needs to be based on sustainable development principles:

- Attain strategic approaches for sustainable tourism development,
- Improvement of tourist infrastructure, standardization, and spatial distribution in strategic points/sites throughout the territory of Kosovo*;
- Creating the representative symbolism for assets and major locations of cultural heritage;
- Promotion of traditional local gastronomy as a tourism product; and
- Marketing and branding of significant cultural and socio-economic values of cultural heritage and their promotion under the global principles of sustainable economic development.

4.4 MONTENEGRO

4.4.1 Ease of border crossing

Montenegro is bounded by four WB6 economies, and enjoys the access to the Adriatic Sea. It has established good transport connectivity with Europe; through land, sea, and air.

Border crossings by land with the neighbouring economies may result in long waiting hours during summer. The NTO CG recommends the following border crossings:

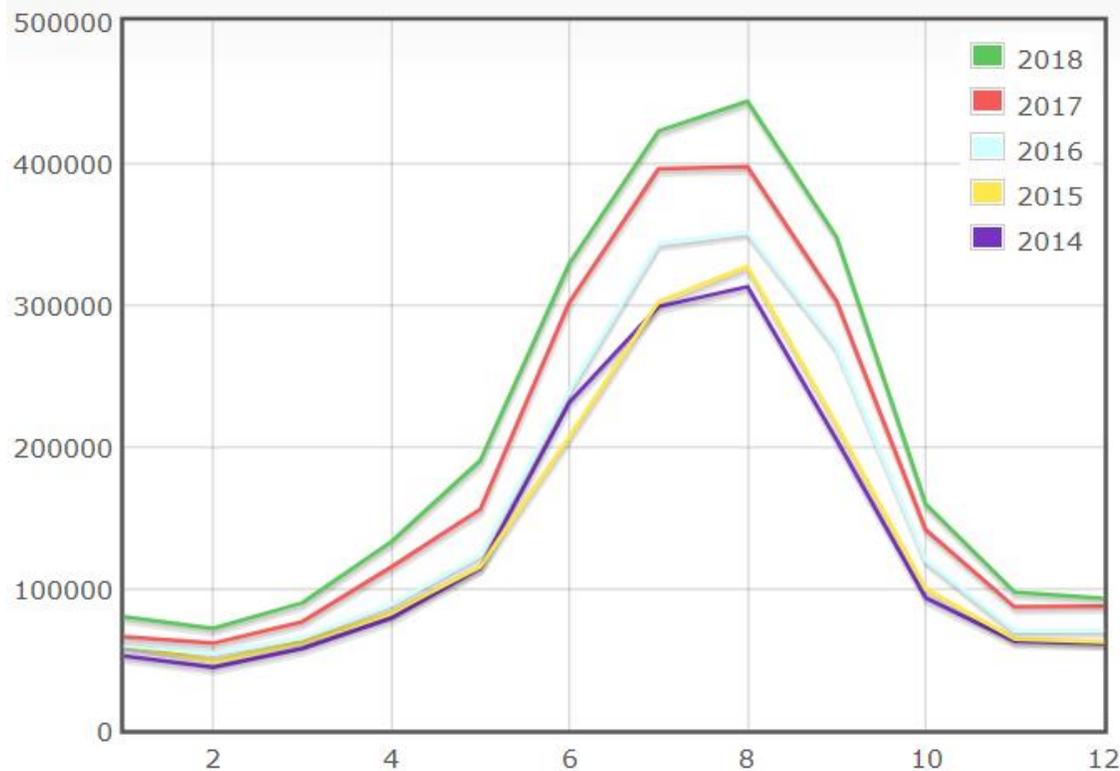
- With Serbia by road at six different points (Ranče, Čemerno, Dobrakovo, Kula, Draženovac, Vuče),
- With Albania by road at three points (Božaj, Sukobin, Grnčar) and by railway at Tuzi,
- With Bosnia and Herzegovina by road at eight points (Sitnica, Ilino brdo, Vračenovići, Krstac, Nudo, Šćepan Polje, Metaljka, Šula), and
- With Croatia at two points, Debeli brijeg and Kobila.

There are also five ports, namely the ports of Bar, Budva, Kotor, Zelenika, and Risan.

Montenegro has two airports: Airport Podgorica and Airport Tivat. In 2017, both accounted for two million passengers, which is an increase of 320 thousand passengers from 2016 (see Figure 1). Since its opening, Airport Tivat reached one million passengers within one year.

According to the NTO CG (2018), low-cost carriers play an important role in Montenegro's air transport. With this in mind, in 2018, Ryanair continued to offer regular bi-weekly flights to London (UK), Brussels (Belgium), Berlin (Germany) and Stockholm (Sweden). Similarly, Wizz Air continued to offer bi-weekly regular flights from Podgorica to Milano Bergamo (Italy), Munchen Memmingen (Germany) and Budapest (Hungary) and introduced two new flights to Warsaw and Katowice (Poland) during the summer season. On the contrary, EasyJet only offered direct flights to London and Manchester (UK) during summer.

Figure 3 - Visual representation of the number of passengers, both airports, 2014-2018. Source: Airports of Montenegro (2019)



4.4.2 Visa regime for foreign visitors

The Government of Montenegro has adopted the visa regime at the proposal of the Ministry of Foreign Affairs and European Integration, and by the Law on Foreigners.

According to the Government, 90 days visa-free entry is granted with a valid passport or a 30 days visa-free entry with a valid ID to:

- Foreign citizens of the European Union,
- Foreign citizens from the Vatican, Andorra, Monaco, Norway, and San Marino, and
- All foreign citizens from WB economies (Albania, Bosnia and Herzegovina, Kosovo*, The Republic of North Macedonia, and Serbia).

Foreign citizens from many different economies can enter Montenegro for 90 days without obtaining a visa if they hold a valid passport (a full list is available on the official website of the Ministry of Foreign Affairs and European Integration).

Entry to Montenegro for up to 30 days is granted without the required visa for the following:

- Foreign citizens holding travel documents issued by EU Member States, USA, Norway, Switzerland, Iceland, Canada, Australia, New Zealand and Japan based on the 1951 Convention on Refugee Status or the 1954 Convention on the Status of Stateless Persons.

Special regime for border crossing for hiking purposes

The Government has placed a special regime for border crossing for those planning to take a hiking tour which includes the crossing of the state border outside the official state border crossing points. These points include the following crossings: Prokletije, Hajla, Ljubisnja, Kamena Gora, Maglic, and Orjen mountains.

All group or individual border crossings outside the official state borders should be lodged with the competent institution, namely state border police of the economy from which the passenger exits. The application forms and guidelines could be found in the Rulebook - Crossing outside the state border crossing points (available from the NTO CG official website).

4.4.3 Data collection and statistics on tourism

Data collection and statistics on tourism are the responsibility of the National Tourism Organisation of Montenegro. According to the latest published NTO's Work Program for 2018, the organization was planning to develop a system for the visualization of data and research analyses with data collected from different sources. The System or the so-called Dashboard would offer data on tourist arrivals and overnight stays, tourist perception and expenditures, latest tourism trends, booking trends, and other information. The Dashboard was meant to represent a hub for all research and data available to NTO CG. At the moment of this analysis, the Dashboard was not yet available.

The Statistical Office of Montenegro conducts a statistical survey on tourist arrivals and overnight stays. It provides basic information on the scope of tourist traffic (arrivals and overnight stays) of domestic and foreign tourists. The survey covers all collective and individual accommodation establishments. The data source of collective accommodation (i.e., hotels, holiday accommodation, and camps) is the guestbook which all entities engaged in the provision of accommodation for tourists are obliged to keep. Similarly, the data source for individual accommodation is administrative databases (Local Tourism Organizations, Ministry of Interior, Ministry of Sustainable Development and Tourism, National Tourism Organization, Secretariats of Municipalities) and statistical sources and records. Obtained results are published in aggregate form, which prevents the display of individual data of reporting units. The Office also conducts surveys for Tourism Satellite Accounts.

At the moment, there is no data available on the length of waiting time at the border crossings, and the availability of special border crossing requirements for specific tourism groups such as outdoor adventure travellers are not available.

4.4.4 Workforce strengthening and mobility

With a population of just over 600,000, Montenegro is the smallest nation among middle-sized economies in Europe. Tourism directly contributed approximately 11% of GDP in 2017 and is forecasted to rise by around 6% to reach 15% of GDP by 2027.

According to WTTC (2018a), the industry directly employs 15 000 people, with a total contribution of almost 40 000 jobs or 20% of total employment. Tourism is the economy's 3rd largest industry and consumed 34% of total investment in 2017. Tourism arrivals in Montenegro increased steadily since the mass tourism boom from 2009, reaching 2 million tourists in 2017. Most arrivals (70%) are made in summer months, between April to October, making Montenegro a so-called sun-sea-sand (3S) destination. This puts great pressure on the industry employees, which are predominately employed as seasonal workers.

In 2007, a survey on the experience of tourists in Northern and Southern Montenegro was conducted by the Centre for Sustainable Tourism Initiatives (CSTI) and the Centre for Entrepreneurship and Economic Development (CEED). The main recommendations for the improvement of the workforce strength, and consequently increase visitor satisfaction are to employ a professional, well-managed workforce that is eager to constantly improve service quality. Moreover, room for improvement was noted for foreign language skills (such as English and Russian). A recommendation was also for the Government to improve access to quality training for Montenegrins (CSTI & CEED, 2007).

4.4.5 Sustainable tourism

Montenegro has three strategic documents in place, which address sustainable tourism development.

First, Montenegro is one of the first economies in the world that has started the process of integration of the 2030 Agenda goals into the national frameworks. This is done through the National Sustainable Development Strategy until 2030 (NSDS), the Proposal of which was finalized in June 2016. In preparing the NSDS, global strategic development goals have been considered in detail and transposed into the national sustainable goals in line with national priorities. Two localized goals are important for tourism: 1) enhance gender equality and improve the position of women, which is related to workforce strength, and 2) ensure environmental sustainability of protected areas valorised for tourism purposes. The NSDS has informed the other two strategic documents.

Second, the Policy and Strategy for Tourism Development of Montenegro by 2020 was developed in 2001. The document posits that tourism in Montenegro should aim at, among others:

- Mitigating summer seasonality in the coastal region by reducing the number of visitors,
- Improve the service quality, and increase RevPar,
- Develop tourism products outside of the main season as well as those in rural areas.

However, intentionally or not, Montenegro fell into the unsustainable laissez-faire tourism spiral. It has historically focused on 3S tourism for development purposes. Local economies became dependent on this type of mass tourism for a large proportion of their income. This type of tourism has forced local communities to neglect historical, cultural, and environmental impacts.

However, the third strategic document has recognized the need for the development of sustainable tourism. Hence, the Strategy for Development of Cultural Tourism in Montenegro by 2023 was developed in 2018. This document defines and unites existing cultural tourism products for the first time. The strategic goals informed by sustainability are (Ministry of Sustainable Development and Tourism, 2018):

- Sustainable tourism development in line with the protection of cultural heritage,
- Increasing recognition of Montenegro as a destination for cultural tourism;
- Enriching the tourism value chain with cultural heritage, especially in the central and northern areas, as well as the development of infrastructure for cultural tourism, the development of public tourism infrastructure and development traffic infrastructure,
- Improvement of destination management in general and management of cultural tourism in particular, through human resource development, quality management, and investment policy.

4.5 THE REPUBLIC OF NORTH MACEDONIA

4.51 Ease of border crossing

The Republic of North Macedonia borders with Albania, Serbia, Kosovo*, Greece, and Bulgaria. With strong ambitions for becoming a candidate for the accession to the EU, in 2018, The Republic of Macedonia and Greece resolved the dispute over the name 'Macedonia,' which resulted in the economy renaming itself as the Republic of North Macedonia. This renaming came into effect in February 2019, with a several-months-long transition for passports, license plates, currency, customs, border signs, and government websites, among others.

According to the State Statistical Office, from 2014 to 2018, The Republic of North Macedonian tourism has seen an increase in the number of arrivals and overnight stays from international tourists, which is a very positive change compared to Kohl & Partner's (2016) suggestions that the tourism industry was predominately relying on the activities of domestic tourists.

According to the State Statistical Office (2019a), most foreign passenger traffic could be observed at the following border crossings: Bogoroditsa (Greece), Blatse (Kosovo*) and Tabanovtse (Serbia). These three border crossings have a significantly high activity by both domestic and international citizens, with the latter two suggesting high entry activity by foreign citizens (see Table 6). Border crossings Delchevo (Bulgaria) and Jazhintse (Kosovo*) showed to be more popular among domestic citizens when traveling or returning from the two neighbouring economies.

Table 6 - Activities of domestic and foreign citizens by border crossing in 2017. Source: State Statistical Office (2019a)

Border point	Entries of domestic citizens	Exits of domestic citizens	Entries of foreign citizens	Exits of foreign citizens
Deve Bair (Bulgaria)	291 714	306 724	320 805	314 773
Delchevo (Bulgaria)	196 969	195 970	92 175	91 344
Novo Selo (Bulgaria)	173 165	179 940	193 340	191 790
Bogoroditsa (Greece)	437 138	696 869	1 088 900	807 917
Medjitlija (Greece)	135 058	250 499	383 271	204 856
Dojran (Greece)	85 603	125 514	190 587	170 116
Kjafasan (Albania)	160 836	289 800	593 541	445 531
Sveti Naum (Albania)	39 898	35 675	141 987	143 400
Blato (Albania)	33 447	50 365	262 812	188 690
Blatse (Kosovo*)	239 985	612 803	1 522 126	355 994
Jazhintse (Kosovo*)	112 524	203 795	185 064	93 204
Tabanovtse (Serbia)	522 818	955 455	1 454 118	554 437

In 2008, the Government signed twenty-year long contracts with the Turkish company TAV for concessions for the two airports: the Skopje International Airport and the St. Paul the Apostle airport in Ohrid.

Skopje Airport is an international airport which accounted for 1 861 282 passengers in 2017. It had had the highest growth rate in the region in recent years, with good operations also being recorded in 2018. The Hungarian low-cost carrier Wizz Air is using the airport as one of their 20 bases and currently offers 19 destinations by operating direct flights to 10 economies. According to Kohl & Partner (2016), in the absence of a national airline, the Government offered subsidies to European LCCs in 2012 to cover air transport services. Wizz Air responded to the offer and launched new routes and used the Skopje Airport one of its bases since. The offer also included launching new routes to Ohrid. In total, the financial support for the new flights included a lump sum of 40 000 EUR for each new destination launched and an additional 11-13 EUR for each departing passenger in the first three years of operations.

On the other hand, the St. Paul the Apostle airport accounted for 155 860 passengers in 2017. The airport has been designed to accommodate up to 400 000 passengers annually, and in 2016 it reached a threshold of 100 000 passengers for the first time. Again, the Hungarian LCC Wizz Air started to operate bi-weekly direct flights to Basel (Switzerland) and London (UK) in summer months since 2015 and introduced summer charter flights for different European economies.

Overall, both airports together recorded positive growth in passenger activity from 2014-2017, with a total of 13% increase than in 2016 (see Table 7).

Table 7 - Passenger traffic of international airline companies at the airports, 2014-2017. Source: State Statistical Office (2019b)

Airport/Year	2014	2015	2016	2017
Skopje International Airport	1 208 379	1 452 373	1 649 374	1 861 282
St. Paul the Apostle	66 457	99 764	138 859	155 860
Total	1 274 836	1 552 137	1 788 233	2 017 142

4.5.2 Visa Regime for Foreign Visitors

According to the Ministry of Foreign Affairs of The Republic of North Macedonia, 90 days visa-free entry is granted with a valid passport or ID to:

- Foreign citizens of the European Union and Schengen Zone Member States, and
- Foreign citizens from Switzerland, Bulgaria, Romania, Cyprus, Iceland, USA, Liechtenstein, and Norway.

For foreign visitors from WB5 economies, the following applies:

- For Albania, Bosnia and Herzegovina, Montenegro and Serbia, visa-free entry is granted with a valid passport or ID;
- For Kosovo*, visa-free entry is granted with a valid passport.

4.5.3 Data collection and statistics on tourism

Data collection and statistics on tourism are the responsibility of the Republic of North Macedonia State Statistical Office. Tourism-related data are covered under the Tourism and Catering area.

According to the Office, tourism data is covered with a monthly statistical survey, as well as with five-year sample surveys on the traveling of the domestic population and sample surveys on foreign tourists in accommodation facilities and foreign visitors at border crossings. These surveys are used to produce monthly and annual data on tourists and nights spent by types and categories of accommodation facilities, country of origin of tourists, types of resorts, capacities, and similar. Also obtained are data on the socio-economic structure of domestic and foreign tourists, type and purpose of traveling, as well as data about the size and structure of the costs and other data related to the traveling.

On the other hand, the catering service is covered with a quarterly, annual, three-year, and five-year statistical survey. These surveys provide data about the size of the turnover and its structure by kind of services and selected products, quarterly and annually, data on the consumption of raw materials used for production of food in catering service-input, technical equipment and employees in the catering trade by occupation and education, as well as data on the accommodation capacities about the size, technical and other characteristics, used to express the level of comfort and content of the tourism offer.

However, depending on the presentation of data, the catering service statistics are often dispersed among different topics, such as labour market, business enterprises, foreign trade, etc. Moreover, the information about tourist sites, attractions, and products and services available as very limited or almost non-existent. According to Kohl & Partner (2016), The Republic of North Macedonia has not yet implemented the Tourism Satellite Account and regular tourist satisfaction survey.

At the moment, there is no data available on the length of waiting time at the border crossings, and the availability of special border crossing requirements for specific tourism groups such as outdoor adventure travellers are not available.

6.5.3 Workforce strengthening and mobility

According to WTTC (2018b), tourism in The Republic of North Macedonia directly contributes 12 300 jobs, with a total contribution of almost 46 200 jobs in 2018. On the other hand, according to the State Statistical Office, in 2018, more than 30 000 people were employed in accommodation facilities and restaurants (see Table 7).

Table 8 - Employment in tourism and hospitality in The Republic of North Macedonia, 2014-2018. WTTC (2018b), the State Statistical Office of The Republic of North Macedonia (2019c)

Source/Data/Year	2014	2015	2016	2017	2018
WTTC (tourism direct contribution to employment)	10 400	11 200	11 000	11 800	12 300
WTTC (tourism total contribution to employment)	38 700	41 500	41 700	44 600	46 200
SSONM* (employed in accommodation facilities and restaurants)	24 722	26 944	25 446	28 569	30 964
SSONM* (total employment)	690 188	705 991	723 550	740 648	759 054

*Note: SSONM=State Statistical Office of The Republic of North Macedonia

Throughout 2014-2018, it is possible to observe a positive trend in tourism's contribution to employment in The Republic of North Macedonia. The number of employees in the accommodation facilities and restaurants makes up 4% of all employees.

According to Kohl & Partner (2016), the tourism workforce has benefited from the development of higher tourism education. The developments that took place over the last couple of years saw five universities (private and public ones) in The Republic of North Macedonia offering higher education programs in the field of tourism. However, the middle education, which offers training and vocational programs for several occupations like waiters, chefs, chambermaids or bartenders did not produce the necessary output of young professionals willing to work in the tourism and hospitality industry. This is because the industry has a negative image about low wages and unsustainable working conditions, which puts off young people to enrol in tourism-related middle education programs. Consequently, the industry is facing lower service quality, as it heavily relies on employing unskilled workers without proper training or education.

4.5.4 Sustainable tourism

For The Republic of North Macedonia, tourism development has not been properly informed by sustainability principles. There are two strategic documents; however, none has presented with strategic development goals that would resemble sustainability in tourism.

First, Kohl & Partner (2016) developed the National Tourism Strategy of The Republic Of North Macedonia 2016-2020, which was seen as a continuation of the National Tourism Strategy 2009 - 2013 prepared by The Republic of North Macedonia's government in 2009. The strategy reads as a Masterplan where the focus is on the development of city, culture, and lake tourism. Moreover, it was recommended that there should be more development and promotion of natural tourism routes, besides the already existing Tikvesh Wine Route, which showed to be well accepted among domestic and international tourists.

Second, the Tourism Development Plans for Ten Destinations across The Republic of North Macedonia was developed in 2016 by CIIP. The Plans have been drafted to guide responsible market-led tourism growth across several high potential market segments in The

Republic of North Macedonia from 2016 to 2020 (CIIP, 2016a, 2016b). The main objective of the Plan is to increase the economic impact of tourism. The Plans come in two Volumes; Volume I provides background, context, the methodology applied, market research and the detailed evidence base for Volume II, which provides targeted development plans for each of ten destinations, with vision, targets, phased actions and expected impacts. It also provides a chapter outlining common issues and recommendations that span across multiple destinations.

4.6 SERBIA

4.6.2 Ease of border crossing

Serbia shares borders with Hungary, Croatia, Bosnia and Herzegovina, Montenegro, Kosovo*, The Republic of North Macedonia, Bulgaria, and Romania. Therefore, Serbia has numerous border crossings with each neighbouring economy. At the moment of analysis, the average waiting time at the border for car passengers was 30 minutes. Moreover, the border crossing data and waiting times are published via online portal Autozona.rs, offering live data on waiting times for all major border crossings in Serbia (including borders with Bosnia and Herzegovina, Montenegro and The Republic of North Macedonia). Additionally, the Auto-moto Association of Serbia offers live video feeds on border crossings for eight points, two for each with Croatia, Hungary, The Republic of North Macedonia, and Bulgaria.

Serbia has numerous airports, which could be classified as international, domestic, or military. However, the most important airports for tourism in Serbia are the following: Belgrade's Nikola Tesla Airport and Niš Constantine the Great Airport. These two airports handle all air passengers' activities in Serbia, with Belgrade Airport recording more than 95% of all activity. Domestically and regionally, Belgrade Airport was reported as the convincing leader by number of passengers in 2017. Poslovni.hr (2018) reports that the Nikola Tesla Airport recorded more than 5 million passengers in 2017, making it a new regional record and an increase of 9% compared to the previous year. The record numbers could be attributed to new direct flight offers by Air Serbia (national airline), Hainan Airlines, Wiz Air, AtlasGlobal and Transavia. Poslovni.hr (2018) concludes that the greatest credit for the success of the Belgrade's Airport can be attributed to numerous low-cost and attractive flights.

4.6.2 Visa regime for foreign visitors

According to the Ministry of Foreign Affairs of the Republic of Serbia, since 2014, a 90 days visa-free entry is granted with a valid passport or residence permit to:

- Foreign citizens of the European Union, Schengen Zone Member States, and the USA.

It was reported that a 90-days visa-free entry had been recently granted to foreign citizens from China, Russia, India, and Indonesia.

For foreign visitors from WB5 economies, the following applies:

- For Bosnia and Herzegovina, Montenegro, The Republic of North Macedonia, a 90 days visa-free entry is granted with a valid passport or ID;
- For Albania, a 90 days visa-free entry is granted with a valid passport;
- Kosovo* was not mentioned in the visa regime guidelines.

6.6.4 Data collection and statistics on tourism

Data collection and statistics on tourism are the responsibility of the Statistical Office of the Republic of Serbia. Data on tourist turnover and capacities are collected by a regular monthly survey on tourist arrivals and overnight stays in accommodation facilities (using the form TU-11). The data collected using the abovementioned form are the number of arrivals and overnight stays of domestic and foreign tourists in accommodation establishments, the number of establishments, rooms (offered and used) and a number of beds (permanent and extra). Moreover, the monthly report on tourist arrivals and overnight stays in commercial accommodation facilities is submitted by all business entities (companies, institutions, cooperatives, unincorporated enterprises, etc.) that offer the accommodation services. Similarly, data on catering is collected quarterly, focusing on the turnover in the observed quarter by months; turnover generated by catering activities by statistical territorial units, and the structure of turnover generated from catering activity by types of catering services. All data are disseminated online in the database Catering and tourism.

One problem with statistics on tourism in Serbia is that there is no data on a total number of accommodation establishments. The Office only collects data from hotels, while hostels are under the jurisdiction of local governments. With this in mind, data on tourist overnight stays do not include that of hostels, which makes tourism analyses very limited. Moreover, data on transport is sometimes limited, with no recent numbers. For example, data on air passenger activities were last collected in 2011 (observation from the Statistical Office website available data in English and Serbian-latinica language).

4.6.4 Workforce strengthening and mobility

According to the Statistical Office of the Republic of Serbia, 3.5% of all employees in Serbia have been employed in accommodation facilities and catering sector. Moreover, 35% of those employed in the sector work in Belgrade. The latter could be attributed to more than one-third of all hotels in Serbia located in Belgrade, with many more predicted to be built in the next couple of years.

Overall, the hospitality industry in Serbia has witnessed a positive growth in the last five years, with more than 107 new hotels built (of which 40 in Belgrade), which represents an increase of almost 30%.

This recent development, coupled with those predicted for future, will most likely result in an increased number of new employment. The workforce will need to be skilled in foreign languages and industry-specific professional services. Regardless of domestic tourism still being dominant in Serbia (both in terms of arrivals and overnight stays), with the recent opening of the borders to visitors from Russia, China, and other economies, the workforce will need to learn how to accommodate tourists with different needs.

In Serbia, the offer of middle and university tourism-related education is abundant. Many schools are offering specialized programs in middle education for chefs, bartenders, and tourism and hospitality technicians etc., dispersed all over the economy. At the moment, little is known of the quality of the programs and the offer of foreign languages courses.

4.6.6. Sustainable tourism

In 2008, the Government developed the National Sustainable Development Strategy. Sustainability has been relied on heavily for the development of tourism in Serbia. Moreover, the NSDS Strategy identified city tourism, spa tourism, cultural and natural heritage tourism, hunting, fishing, village tourism, and river tourism as main tourism activities in Serbia.

Strategic tourism goals informed by sustainability are (Government of the Republic of Serbia, 2008, p. 109):

- Improving accommodation capacities; develop the quality assurance system in tourism and consumer protection systems,
- Develop an IT system for tourism (tourist information centres, leaflets, image, positioning, etc.),
- Develop additional tourism supply with cost-effective operation and potential for local development (trade, gastronomy, hospitality services, travel agencies, etc.), generating new employment accompanied by maximum preservation of cultural heritage and natural diversity, and
- Identify and remove current and potential conflicts between tourism and other activities related to the use of resources.

In 2016, a new Strategy of tourism development in Serbia had been recognized by the Government. The document titled The Strategy of Tourism Development in the Republic of Serbia 2016-2025 posits that the main goals are (Government of the Republic of Serbia, 2016):

- Sustainable economic, ecological and social development of tourism,
- Strengthening the competitiveness of the tourism industry and its related activities in the domestic and international markets,
- Increase the direct and total participation of the tourism sector in the economy's GDP, and increase the direct and total number of employees in the tourism sector and its participation in the structure of the total number of employees, and
- Improving the overall image of Serbia in the region, Europe, and the world.

4.7 SHARED ISSUES

During the course of the research, a number of shared issues also arose, which were experienced either in multiple economies, or by operators who organise tours across multiple economies. Summaries of these issues are given below, in table 9. Although not all of these issues can be addressed within the scope of this report, they provide useful indications of the wide range of areas that need to be addressed to ensure the long-term competitiveness of the tourism industry in the WB6. The two main areas in which these additional issues fall is in the governance of tourism and in transport connectivity in the region.

Table 9 - Shared issues in tourism development across WB6 economies

Issue	Thematic Area	Impact	Addressed in recommendations
Lack of high-level political attention given to tourism	Governance	<ul style="list-style-type: none"> • Difficult to secure funding or policy attention 	No - this is a longer term issue for the attention of the RCC and its partners
Frequent ministerial and senior civil servant changes for tourism	Governance	<ul style="list-style-type: none"> • Lack of consistent prioritisation in tourism policy. • Difficulties in developing long-term strategies. • Difficulties in committing to long-term projects 	No - this is a longer term issue for the attention of the RCC and its partners
Competition between economies at the political level	Governance	<ul style="list-style-type: none"> • Makes joint-working difficult, at all levels 	No - this is a longer term issue for the attention of the RCC and its partners
Perception from the private sector that many cooperation projects are dominated by the public sector and NGOs	Governance	<ul style="list-style-type: none"> • Lack of private sector buy-in for partnership initiatives • Inefficiency and lack of impact from partnerships 	Yes
Problems with external border crossings	Border crossings and visa facilitation	<ul style="list-style-type: none"> • Makes it difficult for tourist to enter the WB6 from some countries, reducing accessibility and leading to poor destination image 	Yes
Emigration, especially of young people	Workforce development and mobility	<ul style="list-style-type: none"> • This is leading to a lack of availability of a suitably skilled workforce 	No - this is a longer term issue for the attention of the RCC and its partners
Lack of wider community support for tourism development in some areas	Social context for tourism	<ul style="list-style-type: none"> • Can cause problem with the quality of the welcome for international tourists and the level of services 	Yes

			provided in destinations	
Variability of the amount and quality of services provided to tourists by operators, and in destination	Workforce development and mobility	<ul style="list-style-type: none"> Difficulties for operators in developing consistent packages between destinations. 	Yes	
Complex visa and border crossing regimes for WB6 citizens in the region	Workforce development and mobility	<ul style="list-style-type: none"> Causes difficulties for operators working across multiple economies 	Yes	
Poor train services and lack of connections	Connectivity	<ul style="list-style-type: none"> Makes it difficult for independent travellers to move around the region 	No - this is a longer term issue for the attention of the RCC and its partners	
Poor internal flight connections and extreme seasonality of international connections	Connectivity	<ul style="list-style-type: none"> Makes it difficult for independent travellers to move around the region. Makes accessing the region complex out of season, for some destinations. 	No - this is a longer term issue for the attention of the RCC and its partners	
Poor tourism infrastructure, especially related to signage, accessibility and transport	Connectivity	<ul style="list-style-type: none"> Can make it difficult for tourist to move around within the destinations Makes it difficult for operators to develop cross-border routes and packages 	Yes	
Lack of consistent approach to collection, sharing and publication of tourism statistics, including a general lack of a single point of access for tourism data.	Data Collection and Statistics on Tourism	<ul style="list-style-type: none"> Difficult for tourism businesses to plan and to develop strategies. Difficult for public sector agencies to plan and to 	Yes	

cooperate
across borders

5 Recommendations

In this section, recommendations are given that relate to issues outlined in the previous section. These recommendations are structured into four sections. The first three cover the thematic areas of:

- Visa facilitation and border crossings
- Data Collection and Statistics on Tourism
- Workforce development and Mobility

We have also proposed an additional short set of recommendations that fall outside the general scope of this report, but which have been developed to address specific issues raised during the research. The theme of sustainable and responsible tourism has been dealt with in a different way. Because the background research for this report revealed that each economy is seeking to develop and promote sustainable tourism, and that where other forms of tourism predominate there is an active move to diversify the industry in a more sustainable direction, we have instead indicated for each of the recommendations, how they contribute to sustainable development, using the logos for the United Nations Sustainable Development Goals (SDG) to indicate clearly how they can be related to wider sustainable development strategies in the region. The full list of SDGs and their description is available in appendix 2 of this report.

Each theme is broken into three sections: vital, desirable and aspirational. This has been designed to suggest a prioritisation of future actions under each theme.

In each section there are short case studies of best practice, chosen to provide examples of practical solutions that have been applied in similar contexts, or to solve similar problems. These case studies are not exhaustive, but can be referred to as a starting point for future developments. Each section also includes a short proposal for a pilot project, which can be used as a pathbreaking project to support the longer term developmental process for each theme.



5.1 BORDER CROSSINGS AND VISA FACILITATION

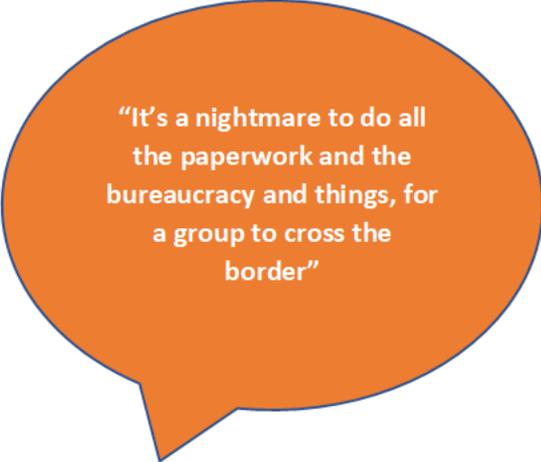
5.1.1 Vital

One of the most pressing issues affecting cross-border tourism in the WB6 economies is the poor experience of many tourists and tour guides and operators at border crossings. This can involve a range of problems that impact on the quality of the tourists' first impressions of the destination.

Frequent responses during the research for this report covered areas such as extremely long waits at crossings with no explanation being provided; unexpected closures of crossings, again with no warning or information available; language barriers involving tourist-facing staff; refusals to let suitably credentialed tourists or guides cross, with no clear explanation available, or avenues for recourse and; in some cases a perception of corruption or other non-transparent procedures taking place at border crossings. It is important to note that these issues were not seen as unique to the WB6, but endemic across the wider Balkan region

To address this issue in a way that does not require a systematic review of border arrangements and resourcing, and is achievable in the short term, we propose a tourism

ambassador programme for key tourist border crossing points. Tourism ambassadors have been used frequently in temporary situations such as alongside the hosting of large special events, where an increase in visitor numbers is identified as a potential danger to the quality of the tourism experience. Often, these are specially trained volunteers, or student on placement programmes, who can be brought in and out of the workforce to mitigate for spikes in tourist arrivals. A second approach is to create a paid service of tourism ambassadors on a more permanent basis, often through the creation of specialist team within the



"It's a nightmare to do all the paperwork and the bureaucracy and things, for a group to cross the border"

police or a local authority. This is particularly effective where it is likely that tourists will be unfamiliar with the destination and / or suffer significant accessibility barriers due to language or culture. In Korea and Thailand, where international tourist arrivals have risen dramatically over the last decade as in the WB6, the decision was taken to create specialist tourist police, and in a more local case, the Serbian and Chinese police forces have partnered to deploy Chinese police in Belgrade to support their growing numbers of Chinese tourists.

These tourism ambassadors should be trained by the local DMO or NTO and deployed in highly visible ways at key tourist border crossings during peak periods. They would work solely on one side of the border crossing, and would provide information and assistance to tourists, as well as being able to mediate in local languages in the case of disputes.

CASE STUDY: KOREA'S TOURISM POLICE

In the city of Seoul, Korea, a specialist tourism police service has been set up to provide advice to tourists, mediate in disputes and provide a first point-of-contact for international tourists. The force was heavily marketed to tourists in 2017, when it was relaunched with uniforms designed by international Korean pop star, Psy, to increase their visibility.



This approach was taken because of the difficulties that tourists face when entering the country, moving around inside the city of Seoul, and finding assistance when issues arose. As in the WB6, the vast majority of their international visitors did not have any familiarity with the local language and this initiative was taken in order to improve the word of mouth reputation of the destination in key markets. Each officer must be able to speak Korean, English and one other language, usually Chinese.

Early evaluations of the project suggest that it has been very successful in helping tourists to adapt to the 'culture shock' involving visiting a new destination and improved the tendency to recommend the destination from international visitors.

5.1.2 Desirable

A further issue that should be addressed in the context of border crossings is the sense of ‘welcome’ at the crossings, leading to tourists not feeling comfortable in the destination on arrival. Respondents identified that this sense of not feeling welcome persisted with tourists during their visits to a destination, and often coloured their perception of the entire trip.

The ‘welcome’ offered by a destination is a key feature of the tourism development activities of many NTOs, with numerous international rankings of tourism destinations available that include this as a key element of their metrics. It is also a vital component of the image of a destination formed by tourists and shared via word-of-mouth recommendations (WOM) and, increasingly, online reviews (eWOM).

Destinations that have successfully addressed problems with their welcome have viewed tourist experiences at border holistically, building partnerships between the multiple stakeholders involved, including border agencies, DMOs / NTOs, transport providers, security staff and police forces.

To address the issues associated with the sometimes poor welcome offered at border crossings, we propose a partnership between NTOs/DMOs and relevant border agencies in each economy, which would also involve selected key travel providers and tour operators. This partnership would involve, in the first instance, an agreement on the principles of the welcome, balancing the respective tourism and security functions of border crossing activity in a mutually agreed way. This should then be developed to include shared training, joint-working, and shared approaches to, for example, signage and other information at border crossings. Where successful, these unilateral initiatives can be further developed to create bilateral, and then multilateral, partnerships at key border crossings in an incremental process leading to a shared regional approach.

CASE STUDY: IMPROVING THE WELCOME TO THE UK

The United Kingdom has historically scored badly for the 'welcome' offered to tourists when they arrive in the country. In particular, tourists rated the experience at the borders particularly poorly. To address this, Visit Britain worked in partnership with British Airways, the UK's Border Agency and key visitor attractions, to deliver a programme of training workshops, information material and a shared brand for the destination, with marketing in multiple languages. The aim of the programme was to develop a stronger 'welcome' to the destination, beginning with the journey to the UK and including all key entry points and locations that the tourists were likely to visit.

This programme was part of the Visit Britain 'Great' campaign, which was funded 50% by the government and 50% by businesses.



As a result of this initiative, tourists to the UK developed a more positive perception of the destination when they arrived at border points, and the UK significantly improved across a number of categories in the Anholt-Ipsos Brand Index, a key ranking of international tourism destinations.



5.1.3 Aspirational

A significant issue affecting the future growth of cross-border tourism in the region is the occasional incidence of significant border crossing problems such as closures and refusals, coupled with an often complex set of visa systems across the WB6 affecting not only tourists, but also tourism workers, guides, operators and transport providers. This reinforces external negative perceptions of the destination that involve border disputes and conflicts and leads to significant destination image problems. In addition, some operators and guides spoken to during the course of this research say that they avoid particular destinations due to the frequency of border crossing problems including corruption, closures and logistical problems including, for example, the need to change to local vehicles, or use local services in preference to those of the operator.

The OECD (2016) set out 7 ways in which government can seek to improve the facilitation of travel:

1. Streamlining and enhancing visa processing, including simplified procedures, shorter and/or translated application forms, consistent implementation of regulations, online application, automated and/or faster processing, improved customer service and capacity at consulates, outsourcing, mobile biometric capture.
2. Changes to visa requirements, including reduced documentation, cost, personal presence at consulate requirement.
3. Changes to visa conditions, including multiple entry visas, extended validity, eligible categories of persons.
4. Changes to the method of visa issuance, including visa on arrival, immigration on board, electronic visa.
5. Removal of visa requirement, including visa exemption, visa waiver programmes.
6. Introduction of other forms of travel authorisation, including acceptance of trusted documents from other countries, electronic travel authorisation.
7. Improvements in the border entry/exit process, including automated passenger processing, pre-arrival/departure security screening.

We propose that, as a long-term aspiration, WB6 economies should work towards the development of an approach that combines elements of (4) and (6) above, so that multiple entry visas allowing tourist to cross borders between economies can be made available on arrival in a WB6 destination. This requires the development of shared approaches to the recognition and harmonisation of visa processes and documentation across economies. The logical consequence of this process would be a more streamlined process for tourists, guides and operators involved in cross-border tourism in the region, which could then be facilitated in line with (7) above.

Given that the multiple border crossing points explained in section 4 of this report are mostly land crossings, and often remote, it will not be possible in most cases to provide expedited border access for holders of the multiple destination visa. In this case, it may be possible to dedicate specific crossing points as for tourist visa holders only, during peak periods, separating domestic and international travellers and allowing for more targeted support and assistance to be given to tourists in line with the vital and desirable actions for this theme.

CASE STUDY: A THREE COUNTRY VISA FOR TOURISTS

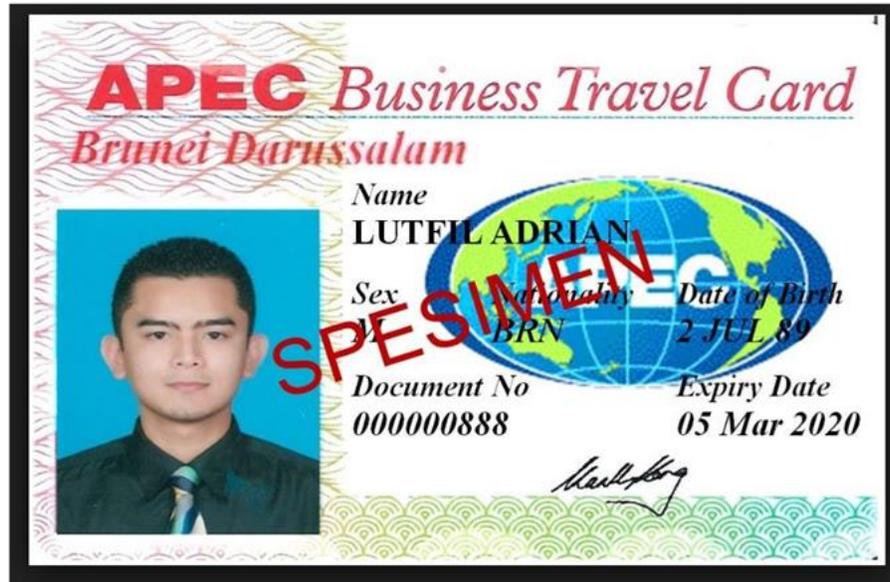
The Kavango-Zambesi UNIVISA was launched in 2017. Because of the fact the countries of Zambia, Zimbabwe and Botswana share a single natural heritage resource for tourism, the Victoria Falls, the three countries cooperated to create a single purchase visa for all three destinations, for international tourists. The UNIVISA scheme was promoted by the South African Development Community, a multi-state NGO for the region. It was originally designed to cover 15 states, but the final roll-out of the project included just three due to logistical and operational problems in its development. The three countries that successfully implemented the project were united by their common resource and fund the operation of the scheme jointly.

The UNIVISA is purchased by tourists for \$50 in arrival at any of the three countries and allows for unlimited movement and stays in Zambia and Zimbabwe over a 30 day period, as well as day visits into Botswana through a specific border crossing.



CASE STUDY: APEC BUSINESS TRAVEL CARD

The Asia Pacific Economic Cooperation (APEC) Business Travel Card (ABTC) facilitates short-term business travel within the APEC region by providing fast track entry through airport border crossings and replacing standard visa or ESTA processes for business travellers within the region.



The 'apply once, information used for multiple purposes' approach is used which means that applicants are only required to make one application for permission to enter participating economies. Successful applicants from fully participating economies are issued with a five-year card that serves as the entry authority to other fully participating economies which have granted pre-clearance for short-term business travel of up to 60 or 90 days. The card also enables holders to fast track immigration processing at each economy's major international airports. Note that Canada and the United States of America (the United States) are transitional members of the ABTC scheme and do not offer reciprocal entry arrangements, but do provide fast track immigration processing at major international airports.

CASE STUDY: FOZ DO IGUACO

Argentina and Brazil share a border at the stunning natural feature of Foz do Iguaco, a complex of seven waterfalls that also border the country of Paraguay. Regarded as one of the natural wonders of the world, the falls attract tourists who want to cross between the countries, in order to gain better viewpoints and to experience the three different national cultures.



The borders between these three countries are, like many borders in the WB6, the focus of intensive security efforts related to smuggling, people trafficking and conflict. Cooperation between the three countries on border issues began during the construction of a large hydroelectric dam, from which all three countries draw power. The area around the dam is jointly managed by the three states, who cooperate in multi-national teams in its governance and day to day management.

Tourists visiting the falls can cross between the Argentinian town of Puerto Iguazu, and the Brazilian town of Foz do Iguacu, with a valid passport, so long as they return within the same day. It is also possible for tourists to cross from the Paraguayan town of Villaron, to either country, on production of a valid passport, also for no longer than 24 hours. This is an example of where a managed zone of cooperation between states with shared interests can open possibilities for tourist visa facilitation.

5.1.4 Pilot Scheme

Because of the political, legal and operation complexities of developing joint projects associated with borders, a pilot scheme should be introduced which aims to implement the 'vital' aspects of this theme, on a unilateral basis, in one or more of the WB6 economies. This would involve the recruitment and training of ambassadors for the destination who would work on one side of a popular tourist border crossing. Costs for this pilot scheme could be significantly reduced by adopting the models used for temporary tourism ambassadors associated with temporary special events, which make use of trained volunteers who are deployed in peak tourism periods only.

These staff would receive specialist tourism training from the local DMO or NTO and would assist independent traveller tourists on an informal basis at border crossings. These staff should be easily identifiable, fluent in the local language and (at least) English, and equipped with relevant tourist information about the destination.

The scheme could be evaluated through a short survey with tourists, carried out by these specialist staff and incentivised with discount vouchers for their destination, as well by border officials who are able to comment on their impact on the speed and process at border crossings.

5.2 WORKFORCE DEVELOPMENT AND MOBILITY



5.2.1 Vital

A key issue in the future development of a cross-border tourism in the WB6 is the persistence of skills gaps in the tourism industry. These skills gaps are felt across the sector, but the major way in which it impacts on the tourist experience in the region is at the level of basic vocation skills in areas such as food and beverage provision, transport and logistics, and customer service. This is a problem is widely recognised by respondents to the research for this report and is symptomatic of wider issues with skills and education in the region. In addition to technical and vocational skills, the World Bank (2019) have also identified that schools, colleges and other education providers do not concentrate sufficiently on the socio-emotional ‘soft’ skills that are necessary to develop a career within services industries, such as communication, leadership and people skills.

“We’re dealing with a lack of education in the workforce. We need to teach people how to actually *do* tourism”

There are multiple reasons for these skills gaps. The impacts of the emigration of young people removes a natural resource base for the development of a suitable workforce for the tourism industry, especially in customer-facing roles. However, this is exacerbated by the perceived low status of the industry, which is dominated by micro and SME businesses in the private sector, with young people in the WB6 clearly expressing preferences to work in the public sector because of perceptions of higher wages and job stability (RCC 2018).

To address these skills gaps, we propose the creation of standardised tourism training to be made available to employees of tourism businesses in the region, which should be delivered at the local level by for example, Chambers of Commerce or Vocational Education and Training providers to ensure that is contextualised for local situations whilst maintain a focus on the application of regional standards. This will have the benefit of creating a more unified tourism product across the WB6, from the bottom up, in a way that impacts directly on the experiences of tourists in the destinations.

Expertise to create training materials already exists in the region, with a number of highly active NGOs and Universities participating in EU-funded projects using these methodologies. The major impediment to the successful implementation of such schemes is the delivery network, although the RCC should be able to leverage its extensive contacts in the region to support this. The project could be delivered mostly online, with face-to-face sessions organised by local trainers using open-source materials. The ERASMUS+ or Leonardo Da Vinci funding programmes would be ideal for this proposal, which would have the added benefit of bringing in partners from framework countries across the EU to support the project and disseminate good practice from outside of the region.

CASE STUDY: ROOTS PROJECT

The ROOTS project is a transnational EU funded project which used ERASMUS+ funding to bring together education and training providers, a university and business support agencies to create an online learning platform for SMEs to develop their skills in engaging with cultural heritage tourism across Europe.



The project was developed to address skills gaps in product development, networking and marketing that were impacting on the potential growth of cultural heritage tourism in rural and peripheral areas of Europe. Over the course of 18 months, experts from five countries collaborated to produce and translate training manuals, information packs and an online learning course aimed at employees and owners of small tourism businesses, all of which can viewed at www.rootsproject.eu

The evaluation of the projects materials by SMEs and training intermediaries was extremely positive, with SMEs reporting that that they found the online modules useful to help them to develop their businesses and training intermediaries said that they found the learning materials valuable for delivering face to face training sessions in their regions.



5.2.2 Desirable

Following on from the issue identified above, a second area to be addressed in the medium term is the high level of variability between economies in terms of skills and service levels. Although this is felt keenly in customer-facing functions, respondents also identified high levels of variability in higher level skills such as in the planning, development and marketing of tourism, making the creation of cross-border tourism products problematic, especially where this involves high levels of public-private cooperation.

In general, high education and VET for tourism in the region does not sufficiently focus on the needs of business and the employability of students. Meaningful engagement of businesses in the creation and development of curricula through, for example, advisory boards, is rare. Quality assurance processes for qualification development do not mandate the involvement of businesses. Students contemplating their future career in tourism are often faced with the choice between gastronomy focused hospitality programmes which lack the application of high level management skills, or tourism programmes with a strong emphasis on geography and/or economics, but impart lots of sector-specific knowledge but also do not emphasise management or soft skills.

To address this issue, we propose the development of a regionally accepted vocational qualification framework for the tourism industry. The framework should cover a range of functional areas connected to tourism and should be aligned with the European Quality Assurance in Vocational Education and Training framework (EQAVET 2019) to ensure both quality assurance and the potential European mobility of a qualified workforce, leading to increased knowledge transfer. Within the WB6 region, this framework would also enhance the mobility of workers in the tourism industries, helping to address seasonal skills gaps in particular destinations who struggle to recruit suitably qualified staff in peak periods.

This is a medium term project which although it involves complex conversations around content, quality assurance, certification and recognition, can build on the strong cooperation that already exists between many higher education providers in the region. More challenging will be the network development process to include further education and vocational training, but the KA2 stream of the ERASMUS+ funding programme which supports life-long-learning (LLL) projects could be used to secure resources to aid with this.

Cultur WB is a project that has been delivered using ERASMUS+ funding to support the development of tourism in the WB6, using the KA2 funding stream - support for capacity building in Higher Education. The project involves partners from inside and outside of the region: Serbia, Bosnia & Herzegovina, Montenegro, The Netherlands, Austria and Germany. The project has a focus on the development of cultural tourism products and services across the WB.



Strengthening Capacities for Tourism Changes in WB
Building Competences for Quality Management of Heritage and Cultural Tourism - CULTURWB
ERASMUS+ | Capacity Building in Higher Education KA2 | Social and behavioural science

Two relevant outcomes from this project are the creation of a lifelong learning (LLL) programme aimed at professionals in the tourism industry and the development of an interdisciplinary postgraduate qualification in cultural tourism that can be delivered by partners across the WB region. These new, region-wide, study programmes have the aim of enhancing and standardising the cultural tourism experience for tourists and increasing the professionalization of the sector.

The LLL courses have been delivered at the Universities of Novi Sad (Serbia), Dzemal Bijedic (Bosnia & Herzegovina) and Montenegro, with very positive feedback from industry participants and from those looking to begin new careers in the tourism sector. The new MA programme, for which quality assurance development has been provided by the University of Breda in the Netherlands to ensure that it meets EU standards for higher education, is now being delivered for the first time at the University of Banja Luka.



5.2.3 Aspirational

Building on the first two recommendations for this theme, which propose training and education projects for those beginning or developing their careers, this proposal relates to the mobility and further professionalization of tour guides in the WB6 region.

Multiple respondents referred to the difficulties that guides and operators can have in working across all the WB6 economies, including with not being able to lead visits to specific destinations or attractions, not being able to operate specialist equipment or offer specialist experiences, especially in the adventure sector, or being required to use local staff to deliver their products, without being able to exercise sufficient quality control over the tourist experience.

In response to this issue, we propose the creation of a regional professional body for tour guides, led by the private sector, which lobbies for cross-economy recognition for its members. The presence of a large number of qualified and experienced tour guides, often with international experience, suggests that the private sector has the skills and capacity to develop such an initiative, although pump-priming support from the RCC or its partners may be valuable to help to kick-start the initiative. Workforce development is also concerned with strengthening the institutions of civil society, in order to protect and enhance the opportunities and rights of workers and this proposal would help to create new, stable stakeholder for tourism development in the region.

Montenegro and Kosovo* are already associate members of the Federation of European Tour Guides (see case study below), meaning that WB6 partners already have access to world leading practice in this area. Additionally, TEG members and partners are active in the wider tour guiding community, particularly in an adventure tourism context. A new association within the WB6 would be able to provide a private sector-led institutional platform for supporting many of the proposals in this report, and could also provide a network of experienced mentors for a growing industry in the region.

The Federation of European Tour Guides (FEG) was formed in 1986 to bring together and strengthen the tour guiding profession across Europe. It is regularly consulted by tourism organisations and international bodies and is recognised as an advocate of high standards and quality in tourism. Montenegro and Kosovo are already associate members of the FEG.



As well providing a voice for this important sector of the tourism industry, the FEG has played a leading role in the development of European-wide quality standards. It now provides training for area-specific certification which certify that national training courses comply with CEN standard EN15565:2008 Tourism Services - Requirements for the provision of professional tourist guide training and qualification programmes.

The activities of FEG include advocacy for the sector, tourist guide training and certification, networking and professional development. A key innovation of the FEG is their quality charter, which all members must sign up to, and which helps clients and tourist to know what to expect from tourist guides all over Europe. The Quality Charter has been adopted by the World Federation of Tourist Guide Associations (WFTGA).

5.2.4 Pilot Scheme

Both the vital and desirable actions for this theme are highly achievable given the extent of regional cooperation between higher education institutions in the region, and the availability of targeted and accessible funding from the EU to support projects of this nature. However, the aspirational action is more ambitious as it involves a private sector-led initiative and the development of partnerships between this initiative and the public sector. For this reason, the pilot proposed relates to the aspirational action.

We propose that a pilot for the regional tour guide association is supported by the RCC and its partners, through the creation of an association of adventure tour guides for the WB6. The adventure tour guides appear to be the most networked and experienced sub-sector in the field of cross-border tourism in the region, and specific individuals have high levels of skills and specialist knowledge of the operations of similar associations in other parts of the world.

The establishment of the pilot would require a small amount of pump-priming funds, primarily for transport, accommodation and meeting space, in order to physically bring together a group of invited individuals who, by the nature of their profession, are likely to be based some distance apart. However, it is important that the new association is private-sector led and free to independently determine its agenda and membership criteria. This is key for the future credibility of the organisation and its ability to participate in future tourism development projects as an independent partner.

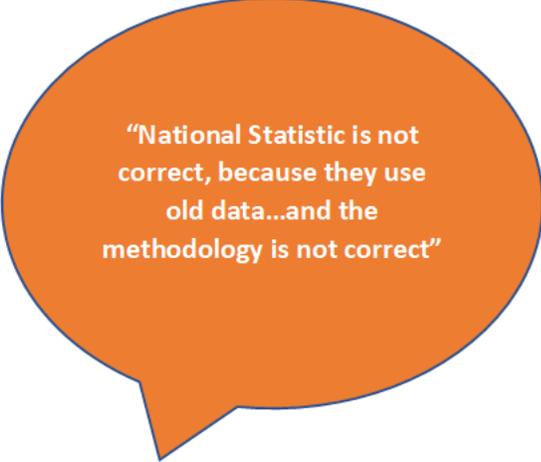
Starting with the creation of shared principles and practices for adventure tourism based on reciprocal recognition and alignment with international best practices, the association should build its internal capacity and then seek to expand to other tour guide sub sectors in order to work towards the aspirational action above.

5.3 DATA COLLECTION AND STATISTICS IN TOURISM

5.3.1 Vital

A clear finding of this research has been that there is a lack of easily accessible data on tourism and tourists across the WB6 economies. Where data is collected, it is then held in multiple locations, and is based on a multitude of methodological approaches. Some of this data is publically available, but much is held within departments and ministries, or by local government, and is not open-access.

This lack of data means that it is not straightforward for local businesses or communities to see trends in the market that suggest business development opportunities, or to plan for investment. This hinders the possibility for tourism to create economic activity and jobs, and makes it difficult to spread the benefits of tourism towards smaller businesses and communities who lack the capacity and the funding to carry out their own market research activity.



“National Statistic is not correct, because they use old data...and the methodology is not correct”

We propose the creation of local level projects involving partnerships between communities, universities and tourism businesses to collect, analyse and publish data that supports the development of tourism in rural and peripheral areas. There is a perception amongst many respondents to this research that collecting and distributing data is the preserve of government and state agencies, but this is only the case for the collection of national statistics and data involving privileged access to areas such as airports and

border crossings. All three partner groups in these projects have an interest in collecting data on tourism: communities who want to know more about who visits them, why, and what they do; universities who want to collect data for research and publication, including postgraduate students and; tourism businesses such as the owners of accommodation or excursion services, or tour guides, who need up to date market information.

The data collected from these small projects should be collected using methodologies developed by regional universities to ensure its credibility and reliability, shared between projects to develop standardised approaches and, ultimately, made publically available. These small projects could be funded through the EU LEADER programme, which aims to support rural diversification and development, including using tourism. Over time, this network of connected data projects will grow, as the evidence of enhanced tourism development through data collection and sharing grows and new partners join the network.

CASE STUDY: DOLHESTI, ROMANIA

In order to develop tourism in the North-East region of Romania, a partnership was developed between the small town of Dolhesti, the North-East Regional Development Agency, regional tour guides and the Alexandru Ioan Cuza University.



The aims of this project were to increase the capacity of the local community to benefit from the growth in tourism to this predominantly rural region, to increase awareness of the local product among regional tour guides, and to collect new data and statistics on local tourism development.

The activities of the project included cultural events hosted by local community groups to which researchers and tourist guides were invited, to familiarize themselves with the product, as well as training activities for local people and businesses. Academics from the university designed small-scale research projects to collect data on tourism activity, the nature and quality of products and the characteristics of visitors. Data was collected by postgraduate students from the university who used this in their own research. The data was then made available publically, so that local business, tour guides and operators could use it to plan their activities with greater knowledge of the local tourism market and areas for growth and investment.

9 INDUSTRY, INNOVATION
AND INFRASTRUCTURE



11 SUSTAINABLE CITIES
AND COMMUNITIES



5.3.2 Desirable

Further to the vital issue identified above, which relates to tourism in specific destinations, a development of this is the lack of cross-border data collection and sharing that can support

regional tourism development. Businesses operating in cross-border areas that share natural and cultural heritage resources are not able to easily access comparable information on the extent and nature of tourism services on opposite sides of the border, or on the volume and characteristics of the tourism market on either side.

The impact of this is that tour guides and operators tend to work within quite narrow networks of trusted collaborators in cross-border tourism, missing opportunities to create new products for tourists. In addition, tourists miss opportunities to experience destinations and attractions that are not on established routes, due to the additional risk to the operators in developing routes in the 'unknown' (to them) areas of destinations. Currently, there are no institutional mechanisms in place to collect and share data on tourism between bordering economies, with a focus on cross-border areas.

To address this, we propose the creation of regional tourism observatories, based in universities and with strong links to both the private sector and state agencies. Many universities in the WB6 have strong research capacities in the fields of tourism and regional development, as well as in specialist areas of tourism research. The RCC and its partners should seek to influence Universities to take a more active role in regional tourism development through the establishment of observatories which will increase the depth and breadth of data available to university-based researchers, and help them to develop stronger business links, with benefits for both publication achievements and long term curriculum development.

An observatory for tourism defines a geographical area as a focus and then treats it as a living laboratory for tourism research, developing data collection methodologies, implementing research projects, and carrying out analysis and evaluation. For this to be successful in the WB6 however, it is important that universities from across borders work in bilateral partnerships, at the departmental level, so that the collection of data across borders does not become problematic, or subject to the difficulties in border crossings outlined above. It is also important that the data collected is not only useful to academics, but it collected, analysed and published in a way that is useful to tourism businesses, including potential inward investors. For that reason, tourism businesses must also be included within the governance and consultation structures for the observatories.

CASE STUDY: FEDERAL DISTRICT TOURISM OBSERVATORY, BRAZIL

The Federal District of Brazil is a Western administrative region of Brazil, which shares borders with Bolivia and Paraguay. It has a mixture of urban and rural locations, including the country's administrative capital, and is rich in natural and cultural heritage. In order to both develop tourism in the region, and monitor the impacts of this development, a Tourism Observatory (TO) was set up in 2010 as a public-private partnership between the state, tourism businesses and Higher Education. One of the key actions for the TO was the creation of a Tourism Statistical System to support the planning, management, evaluation, and monitoring of regional tourism activity, as this was not provided under the current state-led tourism planning system.



The TO now delivers an annual inventory of tourism resources in the region and a tourist profile and satisfaction survey, and has done so from a zero base model using an entirely new data collection model, developed by the Centre for Excellence in Tourism at the University of Brasilia, so that over time a consistent set of new data has become available to support the tourism development activities of all stakeholders. A web portal has been developed for the TO to allow for the remote interaction of participants and the general public:

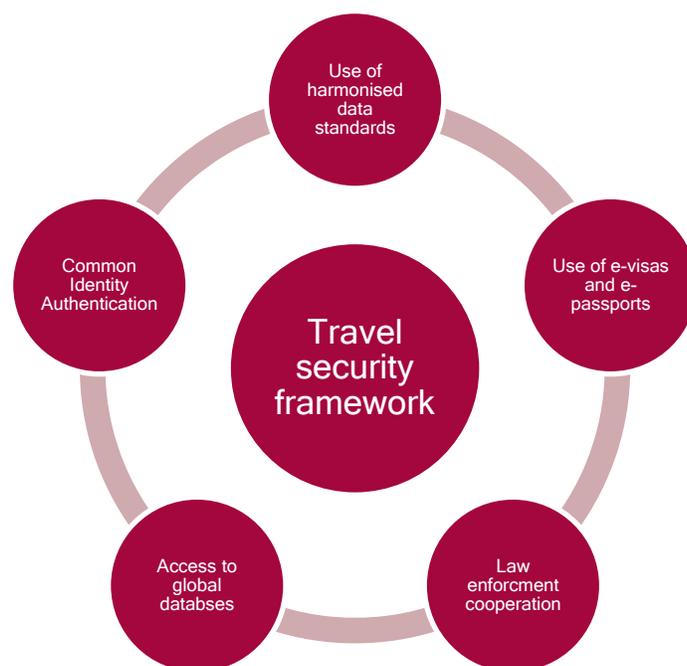
A key element in the successful implementation of the TO was the development of new partnerships, and the sharing of resources, between the state, civil society, universities and businesses. This was achieved through a combination of high-level and grassroots network development.

5.3.3 Aspirational

The final issue to be addressed in this theme, after the local and cross-border issues outlined above, is the lack of comparable, shared and available data at the national level across the economies of the WB6.

Any proposal to address this issue in the WB6 would be aspirational as it requires inter-governmental cooperation on a topic that involves security, borders and economic competition. However, given the long-term ambition of the economies to join the EU, where data standardisation and sharing is commonplace across a range of fields and the single market implies a shared approach to services industries, it is important for the RCC and its partners to engage with this issue over the medium-term, to ensure that tourism is part of these more broad discussions between governments.

We propose that the RCC and its partners actively seek to influence the governments of the WB6 economies to consider tourism as a significant aspect of their discussions on regional partnerships, and future steps towards European integration. The World Economic Forum (2018) indicates 5 ways in which tourism can be developed in a way that aligns with the need for governments to give due regard to internal and external security concerns, and we provide an adaptation of these to form the basis of future research and lobbying activity.



Tourism data sharing in post-conflict and developing economy contexts is not common, but models such as that being used in the West African Community to facilitate regional mobility and the Asia Pacific Economic Community Business Travel card, which allows visa free travel for trusted business travellers within many ASEAN countries give an indication of practical ways in which this can be developed.

CASE STUDY: ASSOCIATION OF SOUTHEAST ASIAN NATIONS

The Association of Southeast Asian Nations (ASEAN) is a partnership of 10 countries who cooperate in a number of areas to promote economic growth including: logistics and transport; agriculture and fisheries; digital; manufacturing and; tourism.



In the field of tourism, ASEAN countries collaborate on a wide variety of issues including destination marketing infrastructure development and data sharing. For example, the ongoing development of a single market for air travel across ASEAN countries has led to significant new foreign direct investment in the region in infrastructure and the growth of regional, domestic low cost carriers such as Air Asia.

Data on tourism for each country is shared to create regional statistical reports which allow investors and businesses to develop appropriate investment plans and which enhance the collaboration potential in the region in areas such as destination marketing and infrastructure planning. Data in areas including arrivals, source markets, travel methods are standardised and shared and country-specific data is shared between NTOs through thematic working groups.

5.3.4 Pilot Scheme

In order to create new data, quickly, that is of benefit to the tourism industry, and to local communities seeking to benefit from tourism, we propose that a pilot scheme of small projects is supported by the RCC and its partners, potentially using funding from the EU LEADER programme.

These projects, one in each of the WB6 economies, should follow the outline given as the vital action for this theme, as local partnerships for the collection and dissemination of new data relating to tourism in rural and peripheral areas.

The aim of the pilot scheme would be to provide a proof-of-concept for this partnership approach to data collection and would give time for benefits to emerge and an evaluation to be carried out before consideration is given as to whether to invite a greater number of partnerships to join the scheme. In the medium term, these project will demonstrate the possibilities offered by the independent collection of tourism data, and create upward pressure on government departments and tourism agencies to open up and extend their data collection and sharing practices.

5.4 ADDITIONAL RECOMMENDATIONS

These final recommendations fall outside of the scope of this report and can be further developed on request, but are included for the consideration of the RCC and its partners.

Issue to be addressed: Operators are suggesting that the approach of developing common products and shared narratives may be counter-productive for motivating international visitors to cross borders, who do not understand regional nuances, and who tire quickly of eating similar cuisine in multiple destinations and visiting similar natural and cultural heritage products.

Proposal: We suggest the emphasis in regional product development to shift towards uniqueness and complementarity, but not competition between economies, which seems counter-productive. A strategy of smart specialisation within cross-border tourism regions could prove very productive in this context.

Issue to be addressed: Many private sector respondents have the impression that regional tourism development projects are very top-down, even when these involve NGOs, and that these do not offer sufficient space or resources for businesses to get involved.

Proposal: Create a completely private sector TEG equivalent to feed into the TEG with the aim of developing longer-term PPPs for tourism in the region - this should probably meet virtually in the first instance, to reflect the lack of resources available to businesses, and with the aim of it becoming completely independent from the TEG in the long term. Going forward, new tourism products and marketing should be co-created with businesses, to a greater extent than is currently happening.

Issue to be addressed: Lack of public understanding of, and support for tourism development

Proposal: An area that may be worth considering is the development of cross-border 'domestic' and social tourism, in order to build capacity in destinations, create additional economic impact from routes and encourage collaboration at grassroots levels. This will also help operators to get to know each other 'on the ground' as currently they find this partnership making challenging.

Issue to be addressed: Lack of shared accessibility standards and signage in the region, especially for tourist signage outside of major cities

Proposal: Creation of regional standards for signage related to tourism, especially with regard to accessibility, an area for which funding is frequently available at the European level.

6 Overview of recommendations

Priority	Issues and Actions	Visas and border crossings	Workforce Development	Data Collection and Statistics
Vital	<i>Issue</i>	Tourists experiencing poor service at border crossings - long waits, lack of transparency, unexpected closures.	Low tourism skills base in many functional areas including logistics, customer service, marketing etc.	Lack of available data at the local level to guide business decisions.
	<i>Action</i>	Tourism Ambassador programme for key border crossing points - DMO / NTO trained staff working at the borders to give information to tourists, and to mediate in local languages in the case of disputes.	Standardised tourism training available for employees of tourism business in the region, delivered at the local level by (for example) chambers of commerce.	Small scale local projects involving partnerships between communities, universities and businesses to collect, analyse and publish data that helps localities to develop tourism
Desirable	<i>Issue</i>	Lack of 'welcome' at border crossings - tourists not feeling welcome in the destination.	High levels of variability between destinations in skills and service levels.	Lack of data sharing in cross-border regions
	<i>Action</i>	Tourism service training for border staff implemented in partnership between NTOs/DMOs and border agencies.	Development of regionally accepted vocational qualification framework - which also enables regional workforce mobility.	Collaborations between projects and businesses in cross-border regions, to collect and share data on tourism
Aspirational	<i>Issue</i>	Significant border crossing issues leading to negative international perceptions of the destination, aided by poor word of mouth and negative operator reports.	Operators and guides lacking regional employment rights.	Lack of comparable data on tourism, between economies

	<i>Action</i>	Specialist, time-limited, tourist visas to allow for dedicated border crossing points and expedited crossing arrangements.	Creation of a regional professional body for tour guides, with cross-economy recognition for members.	New data sharing protocols for tourism and high-level discussions about data convergence
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8 Appendix 1 - The United Nations Sustainability Goals



A full set of information about each SDG can be found at:

<https://sustainabledevelopment.un.org/>