



ECO  
TOURISM

# COUNTRY RESEARCH REPORT

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SUSTAINABLE DEVELOPMENT SERVICES



**STEFAN**

Sustainable Tourism: Eco-friendly Actions Network

# COUNTRY RESEARCH REPORT ON ECOTOURISM AND SUSTAINABLE TOURISM

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## INTRODUCTION

The STEFAN -Sustainable Tourism: Eco-friendly Actions Network- project is focus on developing sustainable tourism and ecotourism in the partner countries the Czech Republic, Hungary, Spain, Slovenia and North Macedonia by establishing an innovative e-learning platform and educational materials to increase the number of tourism professionals, raise entrepreneurial skills and local cooperation among educational companies, people working in the tourism sector and tourists themselves. Improving this knowledge on Ecotourism and Sustainable Tourism, the professional capability and quality of services offered will be will empowered achieving an European Tourism Industry more competitive.

In order to generate the training material, a desk research on tourism was developed in each partner country and stakeholders from 4 key tourism sectors were interviewed: agritourism companies, Destination Management (DMC), National Parks and Public institutions.

The **Country Research Report** that will be illustrated on the following pages collects the results of the activities carried out by STEFAN partners, namely:

- Institut Pro Regionalni Rozvoj, o. p. s. (CZ) (Leading Partner),
- Academia Postal (ES),
- ASK Development d.o.o. (SLO),
- Ecocenter Alapítvány (HU) and
- Green Institute (MK)

These institutions, according to the indications of the Application Form, have realized the present report which includes:

1 – Some theoretical consideration on the themes of ecotourism and sustainable tourism, which makes up the first part of this document. The topics discussed are:

- *Ecotourism*: History of the concept. Definition adopted by international institutions Variants proposed by the academy, Best practices.
- *Sustainable tourism*: History of the concept Definition adopted by international institutions Variants proposed by the academy Best practices.

- *Relationships between Ecotourism and Sustainable tourism.* Points of contact and differences Best practices.
- *Competitiveness of an Ecotourism Destination.* Key components of competitiveness Human factors and Environmental factors.
- *Tourism products that make up the class of eco-tourism products.* Comparison among the lists of tourist products proposed by tourism institutions. Comparison with the ecotourism products supplied by DMCs or TOs. Suggestion & motivations about the one that we should adopt.

2 – Desk survey on the tourism sector of each of the partner countries with particular attention to tourism products related to nature and sustainable tourism. Each national report has collected research, studies and statistics related to the tourism sector produced in each country by universities, research centers and public administrations. A critical reading of the material collected has resulted in the 5 reports which make up the Part 2 of this document. The themes analyzed in each of the 5 reports are:

- Domestic and international demand
- Tourist destinations (cities, regions, parks, etc.)
- Tourism players (Tour Operators, DMC, Service suppliers, etc.)
- Accommodation
- Tourist packages
- Tourist products
- Legislation about ecotourism (if any)

3 - Qualitative research through semi-structured questionnaires on the themes of:

- ecotourism products,
- the interest they receive from the tourist demand
- their approval by public administrations
- training on the job both in presence and online

Each partner country conducted direct personal interviews with destination management companies, farmhouses, nature parks and public institutions, discussing the above issues.



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The texts of the questionnaires which supported the interviews are in Appendix 1. The reports, summarizing the interviews collected, are annexed to each Country Report in this report.

# 1

## **1. GENERAL REVIEW OF THEORETICAL MODELS AND RECENT APPROACH ON ECOTOURISM AND SUSTAINABLE TOURISM**



## 1.1. Ecotourism

### Definition of Ecotourism

The term ecotourism does not have a uniform and clear definition, an inexhaustible number of definitions can be found in the literature and on the Internet. In 1991, ecotourism was defined by The International Ecotourism Society as follows: *"Ecotourism is a responsible journey to natural areas that saves the environment and improves the quality of life of local people."*

It currently covers the basic rules and principles of ecotourism and is defined by the United Nations Environment and Ecotourism as:

"A form of sustainable tourism that actively contributes to the protection of the natural and cultural heritage; involves local and indigenous communities in planning, development and operation, contributes to their prosperity, explains to the visitor the importance of natural and cultural wealth; it is suitable for independent travelers as well as for organized trips of small groups."

In other professional publications, ecotourism is defined by for example:

"Ecotourism is a form of tourism that is run with the utmost respect for the environment and also aims to educate visitors on sustainable development."

"Ecotourism is travel with little impact on the site and to a small extent to vulnerable and intact areas (mostly protected). It helps to educate travelers, provide funding for the environment, directly contribute to the economic development and political empowerment of local communities with mutual respect for different cultures and with an emphasis on human rights."

"Ecotourism is a sustainable form of travel based on natural resources, which is primarily focused on the knowledge and study of nature, and which is ethically managed to have the least possible impact on the place of operation, is locally oriented (control, profits, scope) and is not consumerist. Ecotourism is most common in natural areas, which should contribute to their conservation and protection."

"Ecotourism is a form of tourism, whose participants are motivated by the use of protected nature, nature reserves, cultural monuments and events, national parks, other natural attractions, the biosphere and anthroposphere (human-modeled environment) so as not to be unduly disrupted by tourism."

## History of Ecotourism

The origins of the concept of ecotourism are not entirely clear, one of the first to use it seems to be Hetzer (1965), who identified four principles of responsible tourism: minimizing environmental impact, respecting host cultures, maximizing benefits for locals and maximum tourist satisfaction. The first of these principles was considered to be the most distinctive characteristic of ecotourism.

Other early references to ecotourism can be found in Miller's (1978) work on planning national eco-development parks in Latin America and in documentation produced by Environment Canada in connection with a set of road "ecotours" they developed from the mid-1979 to the early 1980s.

Ecotourism developed during the ecological movement in the 1970s and 1980s. Growing environmental concerns and emerging dissatisfaction with mass tourism have led to increased demand for alternative nature experiences.

At the same time, less developed countries have begun to realize that nature tourism offers the means to make money and provides less destructive use of resources than alternatives such as logging and agriculture.

In the mid-1980s, many such countries identified ecotourism as a means to achieve both conservation and development goals. The first formal definition of ecotourism is generally attributed to Ceballos Lascurain in 1987.

## Principles of Ecotourism

Ecotourism is about unifying the protection of nature, communities and sustainable travel. This means that those who want to participate in the ecotourism program should follow the following *rules* or *principles*:

- minimize the impact of tourism on the environment
- increase awareness and respect for the environment and culture
- provide a positive experience for both visitors and hosts
- provide direct financial benefits for nature conservation
- provide financial benefits to local people
- improve the understanding of the political, social and environmental background of people from different countries

## 1.2. Sustainable Tourism

### History of the concept

Sustainable tourism is a reactive concept to the classic mass tourism and seeks to eliminate its negative impacts (Bac, 2014:132), appeared with the growth of tourist industry from 25 million international tourism arrivals in 1950, to 1.235 million in 2016 (Lane, 2017:9).

The development of this idea started in 1970s amongst academics and thinkers from central Europe, Italy and France. The founding father of the concept of sustainable tourism is considered to be Jost Krippendorf from the University of Bern with his book "The landscape eaters" (1975), where he argues for an alternative – soft tourism, worried about negative impacts of the numerous tourists on the Alpine landscape. The concept became official with the start of the Journal of Sustainable Tourism (JOST) in 1993 (Bac, 2014:133) and their definition as "a positive approach intended to reduce the tensions and friction created by the complex interactions between the tourism industry, visitors, the environment and the communities which are host to holidaymakers."

The wider idea of sustainable development arises in the late 1960s and 1970s, from the concerns for the future of humanity, questioning the endless economic growth. The Club of Rome and their publication "Limits to Growth" in 1972 started a movement that led to the concept of sustainable development. This concept was internationally recognized by the UN body, World Commission on Environment and Development (The Brundtland Commission) in its report "Our Common Future" (1987): "Sustainable development is the development that meets the needs of the present without compromising the ability of future generations to meet their own needs."

The sustainable tourism was an important theme and a tool within the wider concept. The UN Conference on the Environment and Development (UNCED) in Rio de Janeiro (1992) brought crucial documents for international action on the environment and commitments to sustainable development, like "The Rio Declaration" and "Agenda 21", establishing also the Commission on Sustainable Development.

In 2002, The World Tourism Organization (WTO) promoted the program "Sustainable Tourism - Eliminating Poverty", within the Millennium Development Goals, to work in tourism as an alternative in many developing countries. In 2006, the International Task Force on Sustainable Tourism Development, within the UN Environment Program was

established. In 2012, the RIO+20 UN Conference on Sustainable Development brought the final document “The future we want”, in which the importance of tourism for sustainable development is recognized, as well as the need of its funding (UN, 2012:25). Finally, 2017 was declared as the International Year of Sustainable Tourism for Development.

## Definitions adopted by international institutions

There are different definitions of *sustainable tourism development* and *sustainable tourism*. Most of the actors agree on the main goals, but there are different approaches to reach them.

According to the **World Tourism Organization (WTO)**, *sustainable tourism development* requires the informed participation of all relevant stakeholders, as well as strong political leadership to ensure wide participation and consensus building: “Sustainable tourism development meets the needs of present tourists and host regions while protecting and enhancing opportunities for the future. It is envisaged as leading to management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity, and life support systems.”

The World Tourism Organization defines *sustainable tourism* as “tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment, and host communities.” Furthermore, *sustainable tourism* should: 1) Make optimal use of environmental resources that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural heritage and biodiversity. 2) Respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance. 3) Ensure viable, long-term economic operations, providing socio-economic benefits to all stakeholders that are fairly distributed including stable employment and income-earning opportunities and social services to host communities, and contributing to poverty alleviation.

The concept of *sustainable tourism* is tightly linked to a concept of sustainable mobility. Two relevant considerations are tourism's reliance on fossil fuels and tourism's effect on climate change, because 72 % of tourism's CO<sub>2</sub> emissions come from transportation, 24 % from accommodations, and 4 % from local

activities. Aviation accounts for 55% of those transportation CO<sub>2</sub> emissions and up to 75% of tourism's climate impact.

In the **2030 Agenda for Sustainable Development** SDG target 8.9, aims to “by 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products”.

The **International Labour Organization (ILO)**'s definition of *sustainable tourism* is, that it is “composed of three pillars: social justice, economic development, and environmental integrity.

There are numerous forms identified as being “sustainable tourism”, focused on creating a tourism in harmony with environment and social-cultural aspects: **responsible tourism** which is about making “*better places for people to live in and better places for people to visit*”, **ecotourism** defined as: “*responsible travel to natural areas that conserves the environment, sustains the well-being of the local people, and involves interpretation and education,*” *rural tourism, agrotourism, green tourism* etc.

## Variants of definition proposed by the academics

Sustainable tourism raised a vivid debate among researchers, touching also ideological issues. The “father of sustainable tourism”, Jost Krippendorf (1987), sought a new form of tourism with a change in life style and behavior from all parties involved in tourism: better trained tourism personnel, better management by hosts and better-informed holidaymakers.

One of the most important researchers of sustainable tourism, David Weaver (1998:31), says that “the main difference between the old and the new form of tourism is moving the focus from the wellbeing of the tourist to the wellbeing of the host community”.

**According to Greg Richards (2000)**, sustainable tourism is “tourism which develops as quickly as possible, taking account of current accommodation capacity, the local population, and the environment.”

**Butler (2000) defines sustainable tourism as** “tourism which is developed and maintained in an area (community, environment) in such a manner and at such a scale that it remains viable over an infinite period and does not degrade or alter the environment in which it exists to such a degree that it prohibits the successful development and well-being of other activities and processes.”

The opposed voices, as Wheller (quoted by Miller and Twinning-Ward 2005:32), claimed: “we have the problems of mass tourism, which is recording steady and uncontrolled growth. And what is our response? Small scale, slow and controlled development. It is simply impossible!”

## **Best practices on Sustainable Tourism**

Sustainable tourism is gaining credibility within the European tourism industry, focused on management of protected areas across Europe. The protected area managers have to be provided with tools and success stories to improve environmental management capacities for the protection and sustainable use of natural heritage. In order to measure, monitor and disseminate the best practice examples, a set of indicators for measuring sustainability in tourism has been established, in each of the dimensions - economic, social and environmental. The model is common to all regions, allowing comparability and measuring progress in this regard.

### **Best Practice 1**

In Bosnia and Herzegovina’s Una National Park, establishment of a tourist cluster to create new tourist products and economic revitalization. The Park owns the valley of the river Una, canyon, slopes, and other natural landscapes. The Cluster consists of the local community, tourist services providers, civil society organizations, sports associations. It was established within the WWF's program "Protected Areas for Nature and People", funded by the Swedish Development Agency. Members work on building the identity of the destination, promoting nature conservation, branding, labelling and standardizing of their products and businesses. Specific activities: rafting and kayaking on the Una River with permits and concessions for local agencies, to minimize the impact on the river and tufa beds; new fishing regime on the principle of “catch and release” for a positive impact on the fish stock and preservation of autochthonous species; development and presentation of beekeeping and their products to visitors.

### **Best Practice 2**

In Austria’s Trieben Valley, there is a project for preserving biodiversity and the habitats of chamois and black grouse (wildlife refuges), as well as for protecting some areas with reforestation from being used by skiers. Trieben Valley is close to Graz in Styria, not a specially protected area, but one of the most visited for skiing tours in winter. A wildlife refuges are endangered and chamois stock decreased radically in the last twenty years.

The land owner (a big Christian monastery, “Stift Admont”) mobilized the Styrian department for animal protection. Later the other local stakeholders joined: tourism association, Alpine associations, hunting association, officials, hosts and tour operators. So, management of visitor flow and information dissemination have been done, by: lectures about the disturbance-biology of Alpine species, maps with the important areas, defined areas of attention, trips to the difficult “hot spot” areas, discussions how to separate skiers and wildlife. Wildlife refuge areas were selected collectively and the common routes and the refuge areas for wildlife were agreed upon.

### **Best Practice 3**

In Italy, the Egadi Islands on the western coast of Sicily, conservation of the beaches from erosion and proper management as a touristic destination. The GERIN project (Management of Natural Resources) was developed by the Italian National Agency for New Technologies, Energy and Sustainable Economic Development (ENEA). Based on scientific researches, with attention to marine sediments and stranded plant biomass, used for compost production. *Posidonia oceanica* is crucial as a native aquatic plant that protects the beach from erosion caused by waves. The objectives: preserving landscape and natural asset; innovative and sustainable landscape planning; reducing landslides, coastal erosion, and production of waste. The achievements: protection or restoration of the ecosystem, improvement of environmental management systems, sustainable use of natural resources. The tourists were informed about the importance of *Posidonia oceanica* for the seabed and the need to keep the balance of the ecosystem.

### **Best Practice 4**

In Italy, in the Tuscan-Emilian Apennine National Park, a mountain village Succiso regenerated the local community with the help of sustainable tourism. The “Valle dei Cavalieri” community-based cooperative was created in 1991 to cope with the depopulation from 1,000 inhabitants in the 1950s to 64 in the early 1990s. Innovative and authentic tourism attractions were developed, strengthening the cultural identity of the village: traditional sheep farming, cheese production, agritourism, environmental education for schools, hiking, ecotourism, horse-riding, management of information centre and alpine hut. Tourists are hosted in a safe and friendly village, tasting local products and enjoying the mountains from an altitude of 1’000m to 2’000m.

## 1.3. Relationships between Ecotourism and Sustainable tourism

### Theoretical contents

Ecotourism and sustainability are connecting each other. It is enough if we research the concept of them. There are several concept which describe sustainable tourism as a type of ecotourism and vice versa. Ecotourism and sustainable tourism have similar objectives to link conservation goals, economic and rural development. Sustainable tourism guarantee that the ecotourism attractions will be protected from the negative impacts of tourism and keep these unique areas protected for the future generations.

Without sustainable approach ecotourism can be harmful, so the main aim of sustainable ecotourism is to stop the harmful effect of tourism and support population viability and ecological sustainability.

Sustainable ecotourism – important features:

- maximise yearly visitors
- minimize natural and socio-cultural environment impact
- carrying capacity – balance between ecological damage and recovery capacity
- importance of local cooperation - provide alternative employment and income opportunities for local communities
- ecological footprint
- protection of the natural and cultural heritage
- the importance of natural and cultural wealth
- respecting local culture and traditional values
- education is important in this segment – developing environmental awareness
- responsibility and contiguous education of the visitors

As we can see ecotourism and sustainable tourism should belong together. It is important to see the connection not just sustainability and ecotourism, but between sustainability and tourism. Everybody knows, that tourism first priority is having profit and tourism is one of the largest quickly growing sector in the global economy. Sustainable tourism is important because it puts a priority on profit, namely sustainability. The interesting fact that sustainability and profit maximization are conflicting interests.



Tourism growth was outstanding and the destinations starts to recognize the increasing pressure and the negative effects of tourism, so paradigm shift was necessarily despite the conflict interest between sustainability and tourism.

Table 1. Core Indicators of Sustainable Tourism

No.	Core Indicator	Specific Measures	Indicator Groupings
1.	Site protection	Category of site protection according to the International Union for the Conservation of Nature and Natural Resources (IUCN) index	Ecological
2.	Stress	Tourist numbers visiting site (per annum/peak month)	Ecological
3.	Use intensity	Intensity of use in peak period (persons/hectare)	Ecological
4.	Social impact	Ratio of tourists to locals (peak period and over time)	Social
5.	Development control	Existence of environmental review procedure or formal controls over development of site and use densities	Planning
6.	Waste Management	Percentage of sewage from site receiving treatment (additional indicators may include structural limits of other infrastructural capacity on site, such as water supply)	Ecological
7.	Planning process	Existence of organized regional plan for tourist destination region (including tourism component)	Planning
8.	Critical ecosystem	Number of rare/endangered species	Ecological
9.	Consumer satisfaction	Level of satisfaction by visitors (questionnaire-based)	Economic
10.	Local satisfaction	Level of satisfaction by locals (questionnaire-based)	Social
11.	Tourism contribution to local economy	Proportion of total economic activity generated by tourism only	Economic

Source:

<https://www.researchgate.net/publication/265661830> The Practice of Sustainable Tourism in Ecotourism Sites among Ecotourism Providers

The desired objective is a future where tourism ‘success’, is not measured in visitor numbers alone, but rather one that focuses on the positive impacts that tourism can provide at the destination level and the benefits delivered to local economies and communities. The tourism sector needs to be judged not by demand but by its effectiveness in providing livelihoods, contributing to the local economy and the net benefits to destinations, communities and indigenous peoples (Goodwin, 2016).

Sustainable tourism is important and the needed changes started, policies of tourism started to involve sustainability, but as every change it is a slow process. Sustainable tourism types are exits in the world, but not on the same level and as we do not have a

worldwide standardized regulation it is hard to measure and compare them in different countries.

## **Best practices**

The regulations of sustainable ecotourism are not the same in the world or even in Europe, but there are some best practices or good initiatives.

### ***Best Practice 1: Spain - How a new ecotourism model is transforming Spain's most rural areas<sup>1</sup>***

A new study by the Observatorio de Ecoturismo en España (Spanish Ecotourism Observatory) has revealed how ecotourism in Spain is transforming its economic landscape, especially in its most rural areas.

In 2019, 289 ecotourism accommodation business received an estimated total of 781,654 guests producing an economic impact of over €230 million. Meanwhile, 208 sustainable tourism activity companies received over 1.3 million clients, generating an economic impact of over €160 million and directly creating 1,414 jobs.

A new study from the Observatorio de Ecoturismo en España (Spanish Ecotourism Observatory) has shown the overwhelmingly positive impacts that ecotourism is having on Spain's most rural areas. The Spanish Ecotourism Observatory is an initiative created by the Secretary of State for Tourism and the Association of Ecotourism in Spain in 2017 with the goal of identifying and tracking the success of ecotourism in 2019 and the corresponding impact ecotourism has had in Spain's most rural areas.

### ***Best Practice 2: Slovenia - Sustainable Tourism Strategies<sup>2</sup>***

A good understanding of the modern-day traveler's desire for a healthy, sustainable lifestyle and visitor experience helped Slovenia to promote responsible travel practices early on in its tourism strategies. Slovenia's positioning as a green, boutique destination for 5-star experiences is not just aimed at increasing revenue from inbound tourism but

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<sup>1</sup>Source: <https://ecotouristinspain.com/how-a-new-ecotourism-model-is-transforming-spains-most-rural-areas/>

<sup>2</sup>Source: <https://sustainability-leaders.com/slovenia-sustainable-tourism-strategies-stories-examples/>

also seeks to distribute travelers more evenly across seasons and its regions. Slovenia has devoted itself to tackling sustainability issues systematically and strategically, uniting destinations and tourism providers through the Green Scheme of Slovenian Tourism tool and certification programme. There is a concerted effort at the national and local levels to make sustainable tourism one of the basic economic pillars in Slovenia, actively involving destinations, suppliers, and local stakeholders. Sought-after alpine destination, the Soča Valley works towards sustainability by attracting the right investors, as well as investing in product and brand development, destination management, improvement in transport infrastructure, and the quality of services to be enjoyed in the valley. Responsible accommodation provider Urška Tourist Farm is Slovenia's first certified organic farm stay, with 80% of the food served being grown on the farm.

In 2016, Slovenia became the world's first "Green destination" with an impressive 96 out of 100 sustainability indicator. Almost 60% of Slovenia is covered in forests and 32% of the country is covered by agricultural land. No surprise that eco-friendly accommodations (especially tourist farms) are so successful around the whole country.

### ***Best Practice 3: Sustainable ecotourism outside Europe<sup>3</sup>***

Matin Abad Desert Camp & Organic Farm was established in 2008 in Iran. The group of experts in tourism and naturalists want to provide the tourists with an opportunity for an experience and adventures close to the nature. In the company of seasoned naturalists, tourists will experience treks with camel ride or walk; they can ride bikes through waves of sand and mountain valleys, and can even enjoy desert walks in the beautiful star-lit nights. Located between the sand dunes and vast semiarid grass-covered plain is the camp with modern facilities. It is about 45 Km away from Kashan, one of the popular tourist places in central Iran. The essential purposes of building Matin Abad EcoCamp were to demonstrate, educate and to help promote the ideas of "Consider, respect and conduct the ethic codes" and guidelines by the international organizations of Tourism and Ecotourism, so as to practice the CSR (Corporate Social

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<sup>3</sup>Source: <https://sustainabledevelopment.un.org/content/documents/3322Compendium%20of%20Best%20Practices%20in%20Sustainable%20Tourism%20-%20Fen%20Wei%2001032014.pdf>

Responsibility) and SRB (Socially Responsible Business) models and to build sustainable Tourism in Iran.

## **Actuality – WWF Updates – COVID-19: How tourism affects sustainability namely local wildlife conservation<sup>4</sup>**

Many communities rely on tourism to generate income and other benefits from local wildlife conservation. However, the wholesale shutdown of tourism around the world due to the COVID-19 pandemic has shown how unsustainable this source of income can be – and how any disruption can lead to harmful impacts for people and nature. We have therefore launched a global innovation challenge with the Luc Hoffmann Institute and the African Leadership University’s School of Wildlife Conservation to develop new revenue models that do not depend on tourism for local communities in Africa. Any proposal must enable them to obtain their livelihoods from wildlife, manage their natural resources sustainably, and improve their well-being. Applicants have the chance to win a place on the African Leadership University’s incubation programme and gain access to seed money.

### **1.4. Competitiveness of a tourist destination**

#### **Evolution of the criteria to measure competitiveness**

“The first definitions of competitiveness have been used primarily to focus the attention to the cost position of firms or countries. It is still often used today when an economy (or a firm or industry) is challenged by new low-cost competitors. It is this narrow focus on costs that was criticised by Krugman<sup>5</sup> as "elusive and meaningless" at the conceptual level and as "misleading or even dangerous" at the policy level, since this narrow

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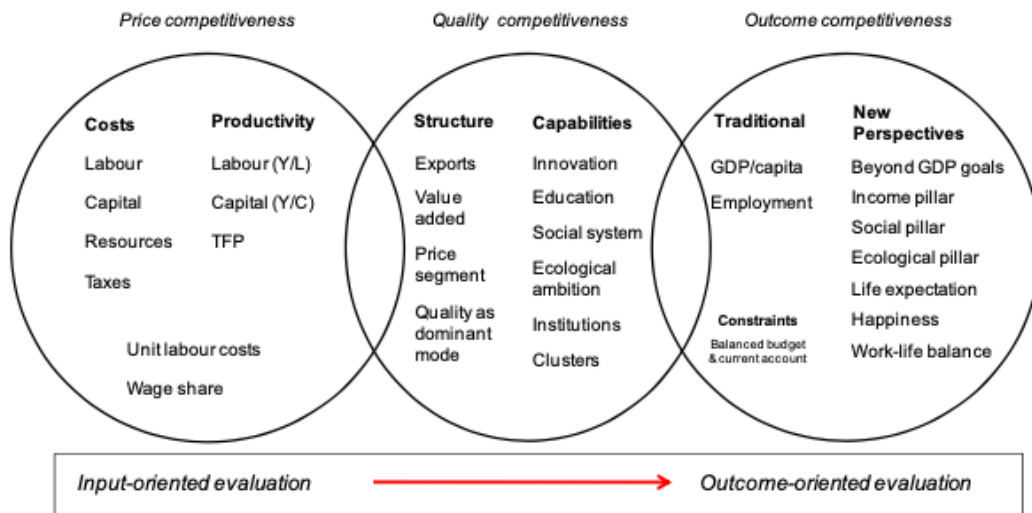
<sup>4</sup>Source: <https://updates.panda.org/global-innovation-challenge-to-support-community-conservation>

<sup>5</sup> Krugman, P. (1994A), “Competitiveness: A Dangerous Obsession”, Foreign Affairs; (1994B), “The fight over competitiveness: A zero sum debate: Response: proving my point”, Foreign Affairs.

interpretation implies that cost reduction is the only effective policy response. (See Fig. 1)<sup>2</sup>

Later, competitiveness evaluates the sources of competitiveness of firms and countries as well as their future prospects. Competitiveness in this sense is about processes and abilities. In the literature, terms like "quality competitiveness" or "technological competitiveness" are used to describe this broader interpretation. Competitiveness in this definition depends by "the structure of an economy, and the second are its capabilities, for instance in terms of the innovation and education system"

*Fig. 1 Towards a concept of competitiveness under new perspective*



Source: Own conceptualisation for WWWforEurope.

Competitiveness should not be assessed by looking at inputs proper (costs and productivity) or inputs more broadly (structure and capabilities) alone. Rather, it ought to be complemented by assessing outcomes ("the proof of the pudding is the eating").

According to this point of view, the ultimate proof of the competitiveness of an economic system lies in its ability to provide the population with high living standards, good employment prospects in a sustainable context that corresponds to the definition of the EU. This definition was generalized by the authors of a European Commission's working paper on competitiveness. The competitiveness is the "ability of a country (region, location) to deliver the beyond-GDP goals for its citizens today and tomorrow".<sup>6</sup>

<sup>6</sup> Aiginger K., Barenthaler – Sieberg S., Vogel J., (2013) WWW FOR EUROPE Competitiveness under new Perspectives", European Commission, European Research Area.

However, in this definition, the reasons for competitiveness and the variables that govern it remain obscure.

A turning point in the long debate on the topic of competitiveness is linked to the studies of Michael Porter who in his *The Competitive Advantage of Nations*<sup>7</sup> (1990) identifies the key factors leading to a particular nation's success in a specific industry sector. Porter suggests 4 elements that generate competitive advantages and the relationships that bind them:

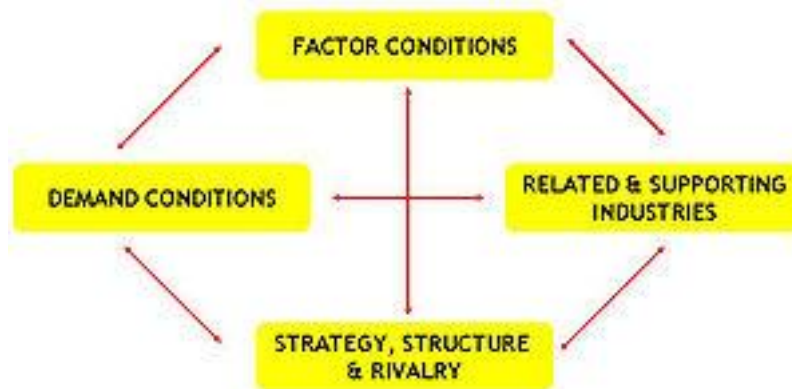
- **The conditions of the factors**, the set of human resources (previous skills, quality of the workforce), local resources (raw materials, communication routes, etc.) and infrastructures present in the chosen region or state.
  - **The conditions of demand**, a strong and demanding (in terms of quality, finishes, innovation, etc.) internal demand for products and services drives rapid innovation and the periodic introduction of new products.
  - **The related and support industrial sectors**, innovative suppliers in terms of machines, equipment and materials, but also financial solutions, contribute to maintaining a high propensity for innovation by stimulating growth.
  - **The strategy, structure and rivalry of the companies**, a heated and healthy competition between companies active in the same market and product contributes to maintaining high the competitiveness of the sector.

This model is commonly named as the "Porter's diamond".

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<sup>7</sup> Porter M., (1990) *The Competitive Advantage of Nations*, The Free Press

*Fig. 2 The Diamond of Porter*



Although M. Porter's analysis focuses exclusively on classic industrial sectors, his model of competitiveness has instead had important impact also in the tourism sector.

## The competitiveness of a tourist destination

The issue of the competitiveness of a tourist destination since the late 90s of the last century has been at the center of both academic and business community debate. “Regions that had, only until recently, severely under-developed tourism industry are increasingly investing in tourism in an effort to boost their economies. As a result, the number of tourism destinations worldwide is constantly growing.

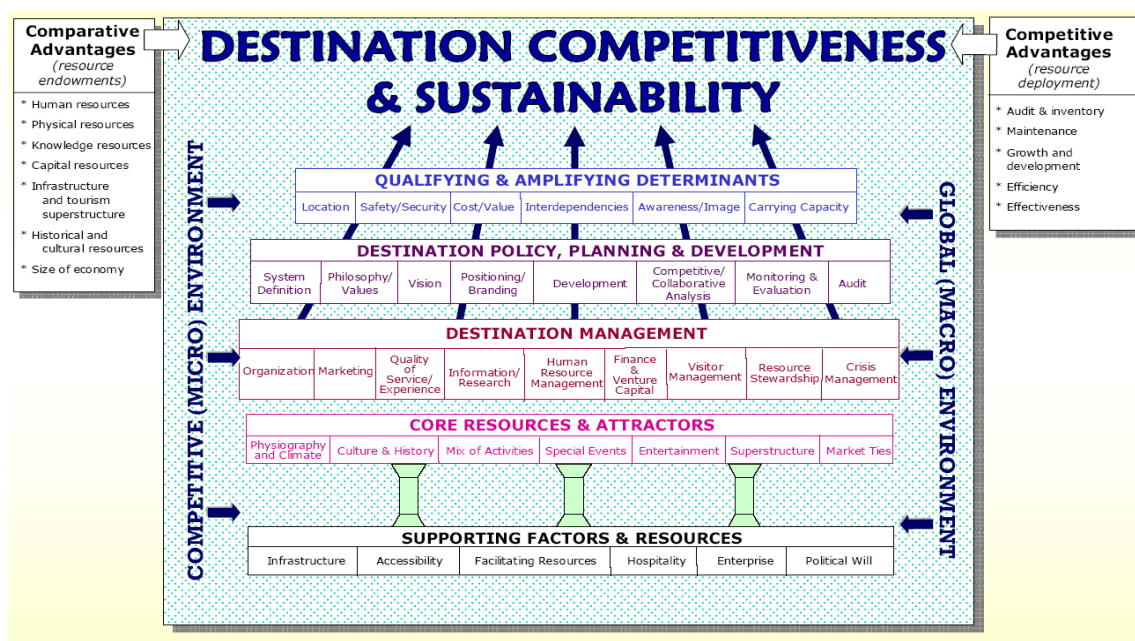
At the same time, the number of originating markets has remained effectively unchanged” and the figures of growth of demand are remained smaller that the ones of the supply. **“This asymmetry has led to fierce competition on the international tourism market, which is constantly on the rise”<sup>8</sup>. Competitiveness has been identified in the tourism literature as a critical factor for the success of tourism destinations** and many studies and researches have been conducted on the destination competitiveness and on the factors influencing it.

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<sup>8</sup> Nataša Drakulić Kovačevića, Lazar Kovačevićb, Uglješa Stankovc, Vanja Dragičevićc, Aleksandar Miletić “Applying destination competitiveness model to strategic tourism development of small destinations: The case of South Banat district” Journal of Destination Marketing & Management

“Tourism destination competitiveness 'has tremendous ramifications for the tourism industry, and is therefore of considerable interest to practitioners and policy makers' (Ritchie & Crouch, 2000, p. 6)<sup>9</sup>. The two authors have left an important mark in studies on the competitiveness of tourist destinations and, although their most important articles were written between 1999 and 2003, it is still impossible to ignore them. The model they propose explicitly takes Porter's as a reference, adapting it however to the characteristics of the tourism sector (See Fig.3).

Fig. 3. The Ritchie & Crouch's Conceptual Model of Destination Competitiveness



Its most important feature, it is worth remembering, is the “fundamental difference between the nature of the tourism product and the more traditional goods and services. A model of competitiveness that focuses specifically on the tourism sector is based on

<sup>9</sup> Ritchie, J. R. B., & Crouch, G. I. (2000). “The competitive destination, a sustainable perspective”. *Tourism Management*, 21(1), 1–7.

Crouch, G. I., & Ritchie, J. R. B. (1999). “Tourism, Competitiveness and Societal Prosperity”. *Journal of Business Research* 44 (3), 137-152.

Ritchie, J. R. B., & Crouch, G. I. (2003). *The competitive destination, a sustainable tourism perspective*. Cambridge: Cabi Publishing.



the nature of the tourism offering product, which from a destination perspective can be regarded as"<sup>10</sup>....."an amalgam of individual products and experiences opportunities that combine to form a total experience of the area visited"<sup>11</sup>

Returning to the Ritchie & Crouch model, the aspect that immediately surprises is its detail: in total, the model identifies 36 destination competitiveness attributes and more than 250 factors<sup>12</sup>.

In a nutshell, however, the model can be reduced to the interactions of 6 main blocks:

- **The comparative advantages:** i.e. the attractive resources of the territory. The reasons why a tourist decides to visit a specific destination.
- **The competitive advantages:** which correspond to products and services manmade, or in a longer-term perspective "the destination's ability to use the attractive resources effectively over the long-term".
- **Competitive (micro) environment:** refers to the tourism business "ecosystem" operating in a destination and its ability to innovate and keep competition-collaboration processes alive within it
- **Global (macro) Environment:** considers what is moving outside the destination and the way it affects its competitive capacity (government policies, transport systems, entry into the market of new competitors, etc.)
- **Destination management, Destination Planning & Development** refers to the managerial choices driving the tourist destination both at the company level but also of the destination as a whole.

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<sup>10</sup> Gomezelj Omerzel D. (2006) "Competitiveness of Slovenia as a tourist destination". Managing Global Transition,

<sup>11</sup> Murphy P., Pritchard M.P., Smith B. (2000) "The destination product and its impact on traveller perception" Tourism Management

<sup>12</sup> Macro environmental factors, for example, are categorized into six principal groups related to the economy, technology, ecology, political and legal developments, sociocultural issues, and the constantly evolving demographic environment

- **Qualifying and amplifying determinants:** these are the factors that affect the carrying capacity of the destination, its location, its geographical characteristics. All the positive or negative externalities that can be partly removed or mitigated with considerable efforts but also the enhancement factors from which a territory benefits.

The structure showed in fig. 3 is, obviously, a conceptual model, with little attention to operational aspects, but it has nevertheless provided the theoretical basis for “a plethora of research studies. These include the development of comprehensive frameworks<sup>13</sup>; studies of single destinations; comparisons of destinations and studies that focus on specific attributes of competitiveness such as price competitiveness, environmental competitiveness, and business performance”<sup>14</sup>. “Some empirical studies concentrate on islands, big cities, particular type of destinations, famous resort destinations, regions, provinces. Very little empirical work has been done in small tourism destinations; competition research applied to small towns or villages is almost inexistent.

Many studies focus on the main factors affecting destination competitiveness (e.g. key attractors, supporting factors, destination management, tourism policy, and demand factor). Most of the work on competitiveness suggests, with different emphasis, that each one of these factors can improve destination competitiveness, but without a proper testing. There is still no evidence of a significant impact of these factors on the performance of a destination in the competitive market”<sup>15</sup>.

However, the studies reached consensus about the fact that achieving competitiveness in tourism sector is heavily dependent on the sustainability of a tourism destination.

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<sup>13</sup> Dwyer, L., and C. Kim. (2003). “Destination Competitiveness: Determinants and Indicators.” *Current Issues in Tourism* 6 (5): 369–413. WEF (World Economic Forum). 2015. *The Travel & Tourism Competitiveness Report*. Growth through Shocks. Geneva

<sup>14</sup> For a rich bibliography on the indicated topics see Knežević Cvelbar L., Larry Dwyer L., Koman M., Mihalič T. (2016) “Drivers of Destination Competitiveness in Tourism: A Global Investigation” *Journal of Travel Research*

<sup>15</sup> Other bibliography on the themes of competitiveness in the tourism sector see Goffi G. (2014) “Determinants of Tourism Destination Competitiveness: a theoretical model and empirical evidence” <https://www.researchgate.net/publication/259503013>

Ritchie & Crouch (2000) argue that *“competitiveness is illusory without sustainability. To be competitive a destination’s development of tourism must be sustainable, not just economically and not just ecologically, but socially, culturally and politically as well”* (p. 5).

Despite the large amount of research carried out, however, it is not yet possible to establish: a ranking among tourist destinations based on their level of competitiveness; how to manage the various variables to increase it and, ultimately, establish the degree of effectiveness of these variables to achieve greater competitiveness.

This also depends on the fact that still in the tourism sector there are very different concepts of competitiveness, at the two extremes of which we can place that of Ritchie and Crouch (2003) *“what makes a tourism destination truly competitive is its ability to increase tourism expenditure, to increasingly attract visitors, while providing them with satisfying, memorable experiences, and to do so in a profitable way, while enhancing the well-being of destination residents and preserving the natural capital of the destination for future generations”* and that of Dwyer, Forsyth, and Rao which claims *“tourism competitiveness is a general concept that encompasses price differentials coupled with exchange rate movements, productivity levels of various components of the tourist industry, and qualitative factors affecting the attractiveness or otherwise of a destination.”*<sup>16</sup> Two very different ways of looking at competitiveness.

Furthermore, often emerges from field researches that key competitiveness variables in certain situations become irrelevant or even change their sign<sup>17</sup>.

To get out of this difficult situation, various ways have been suggested, we present two: the first radically suggests replacing the concept of competitiveness with that of

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<sup>16</sup> Dwyer, L., P. Forsyth, and P. Rao. (2000) “The Price Competitiveness of Travel and Tourism: A Comparison of 19 Destinations.” *Tourism Management*

<sup>17</sup> Jia-Lie Ching, May-Chiun Lo, Mohamad Kadim Suaidi, Abang Azlan Mohamad & Chee-Hua Chin (2019) “Tourists’ Perspective on Ecotourism Destination Competitiveness: The Role of Tangible Components” *International Journal of Accademic Research in Business & Social Sciences*. The article suggests that accessibility, natural resources, infrastructure and range of activities had a significant positive impact on ecotourism destination competitiveness, whereas no significant impact found among accommodation, cultural heritage, entertainment, and special events.

productivity, the second instead proposes to identify competitiveness indicators and aggregate them into synthetic indexes as the World Economic Forum does.

## Competitiveness is Productivity

The assimilation of the concept of productivity to that of competitiveness has authoritative supporters in the economic field, we mention only two, but highly authoritative: M. Porter<sup>2</sup> “*the only meaningful concept of competitiveness at the national level is productivity*” and P. Krugman<sup>18</sup> “*Competitiveness is a poetic way of saying productivity*”.

Consistently with these assumptions Knežević Cvelbar *et alia* define “*the destination competitiveness as the total tourism contribution to GDP per tourism employee*”<sup>10</sup>. The authors using an econometric model, which has productivity per employee in tourism as a dependent variable in 139 countries and 105 independent variables, obtain some relevant results.

One of the most interesting identifies **the country’s level of economic development** as discriminating factor the effectiveness of the variables that affect productivity / competitiveness:

- “The main drivers of competitiveness in **developed** countries are: Macro-Environment<sup>19</sup>, Business Environment<sup>20</sup>, and General Infrastructure<sup>21</sup>. Interestingly, these factors are all-economy-based rather than tourism-specific.

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<sup>18</sup> Krugman, P. (1994) “Competitiveness: A Dangerous Obsession.” *Foreign Affairs* March/April

<sup>19</sup> The macro variable includes: Reliance on professional management; Willingness to delegate authority; Extent of staff training; Purchasing power parity; Ethical behavior of firms; Quality of education system; Capacity for innovation; Cost of living; Judicial independence; Public trust in politicians; GDP per capita; Nature of competitive advantage; Quality of natural environment; Quality of scientific institution; CO<sub>2</sub> emissions

<sup>20</sup> FDI and technology transfer; Business impact of rules on FDI; Venture capital availability; Extent of business internet use; Firm level of technology absorption; Availability of the latest technology; Local supplier quality; Country credit rating.

<sup>21</sup> The macro variable includes: Access to improved drinking water; Access to improved sanitations; Physician density; Quality of health care,; Internet users; Quality of electricity

- The main driver of competitiveness in **developing** countries is Tourism Infrastructure<sup>22</sup>.
- Destination Management<sup>23</sup> is an important driver of competitiveness in both developed and developing countries, but the magnitude of its impact is higher in developing countries.
- The impact of Endowed Resources<sup>24</sup> on destination competitiveness is insignificant and inconclusive in most of the specifications.”

## The competitiveness indexes

A different line of research is directed towards the identification of tourism competitiveness indexes. This approach is the one preferred by two important institutions: OECD<sup>25</sup> and World Economic Forum (WEF). A picture of the state of the art

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supply; Broadband Internet subscription; Road density; Risk and safety; ATM accepting visa cards; Presence of major car rental companies; Life expectancy;; Intensity of local competition;; Quality of domestic transportation,

<sup>22</sup> The macro variable includes: Variety of Activities; Variety of shopping; Variety of restaurants; Number of international fairs and exhibitions; Variety of entertainment; Number of hotel rooms; Number of tour operators; Number of food and beverage establishments

<sup>23</sup> The macro variable includes: Sustainability of TT; Effectiveness and branding of marketing to attract tourists; Government prioritization of TT; Quality of air transport infrastructure; International air transport network; Attitude of the local population towards foreign visitors; Protected areas; TT government expenditure.

<sup>24</sup> The macro variable includes: Variety of cultural sights; Number of world heritage cultural sights; Number of world heritage natural sights.

<sup>25</sup> Dupeyras, A. and N. MacCallum (2013), “Indicators for Measuring Competitiveness in Tourism: A Guidance Document”, OECD Tourism Papers, 2013/02, OECD Publishing. <http://dx.doi.org/10.1787/5k47t9q2t923-en>

of the academic research can be found in Ivan Paunović<sup>26</sup> *et alia*. This methodology is object of two main criticisms:

- The weighting to be attributed to the various indices. This parameter is obtained with subjective estimates
- The discontinuous effects of some variables in relation to different economic and social situations of the analyzed countries are not considered (for example: developed or developing country)

The reference point for the competitiveness indexes is the Tourism and Travel Competitiveness Index (TTCI) developed by the WEF. TTCI's goal is to measure the factors and policies that make a country attractive from a tourist point of view. The index is calculated every two years since 2007. In the 2019 report<sup>27</sup> the tourism sectors of 140 countries around the world were analyzed and evaluated.

The data used include secondary sources (hard), i.e. official statistics and information from the databases of important world organizations, but also primary sources (soft), i.e. data from annual surveys involving world tourism experts and managers of multinational tourism and transport companies.

The structure of the TTCI (2019) encompasses four sub-indices:

- **Enabling Environment:** considers the setting necessary to operate in a country
- **T&T Policy and Enabling Conditions:** analyzes the policies and strategies that have a direct impact on the T&T industry
- **Infrastructure:** studies the availability and quality of physical infrastructure
- **Natural and Cultural Resources:** human, cultural and natural resources

The four sub-indexes are divided into 14 pillars and elementary indicators according to the scheme illustrated in the figure 4. We leave to those who are interested the possibility of informing themselves about the methods of calculating the indices.

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<sup>26</sup> Ivan Paunović, Marc Dressler, Tatjana Mamula Nikolic' and Sanja Popovic' Pantic' (2020) "Developing a Competitive and Sustainable Destination of the Future: Clusters and Predictors of Successful National-Level Destination Governance across Destination Life-Cycle" Sustainability

<sup>27</sup> <https://www.weforum.org/reports/the-travel-tourism-competitiveness-report-2019>

*Fig. 4 The structure of the TTCI index*



We conclude this short document on the competitiveness of tourist destinations by reporting the TTCI 2019 values for the STEFAN partner countries:

*Tab 1 Rank and scores of Travel and Tourism competitiveness indexes according the WEF*

Countries	Overall TTCI		Sub Index A Enabling Environment		Sub Index B T&T Policy and Enabling Conditions		Sub Index C Infrastructure		Sub Index D Natural & Cultural resources	
	Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Czech Republic	38	4,3	26	5,6	36	4,7	36	4,5	61	2,5
Hungary	48	4,2	42	5,3	17	4,8	45	4,1	60	2,5
North Macedonia	101	3,4	70	4,9	121	3,8	91	3	119	1,8
Slovenia	36	4,3	38	5,4	18	4,8	43	4,2	43	2,9
Spain	1	5,4	33	5,5	10	4,9	4	5,6	3	5,7

Source: WFE - TTCI

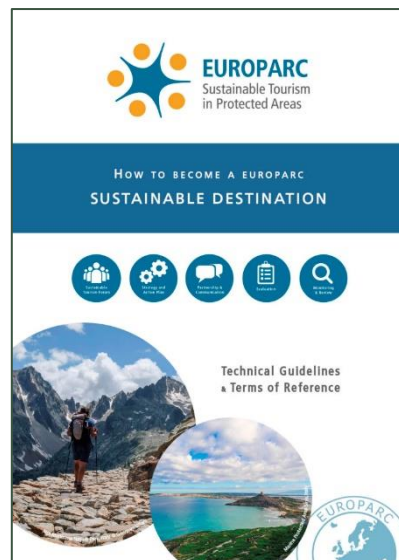
## 1.5. Tourism Products that make up the class of ecotourism products

Ecotourism can be assumed as tourism that focuses on conserving nature and educating and/or integrating visitors on the local environments and surroundings, mainly naturals. It's one of the overlapping components of sustainable tourism; the other being Ethical tourism, or Responsible tourism.

The consideration of these two factors, and their combination materialized in the ecotourism or sustainable tourism market, easily shows us that **today in Europe we have the main ecotourism product lines:**

- Ecotourism products based on natural resources, their use and/or enjoyment, in a natural environment.

In this case we can distinguish between the use and enjoyment of freely available natural resources, and the use of protected natural resources. In the latter case, it's worth highlighting the progressive and enriched presence of protected areas under the application of the **“European Charter for Sustainable Tourism in Protected Areas”**, both for its scope in terms of protection, as well as acting as a seal of quality or international distinctive. In fact, its indications are today a guide on how to create tourist products, and at the same time an indicator of quality.

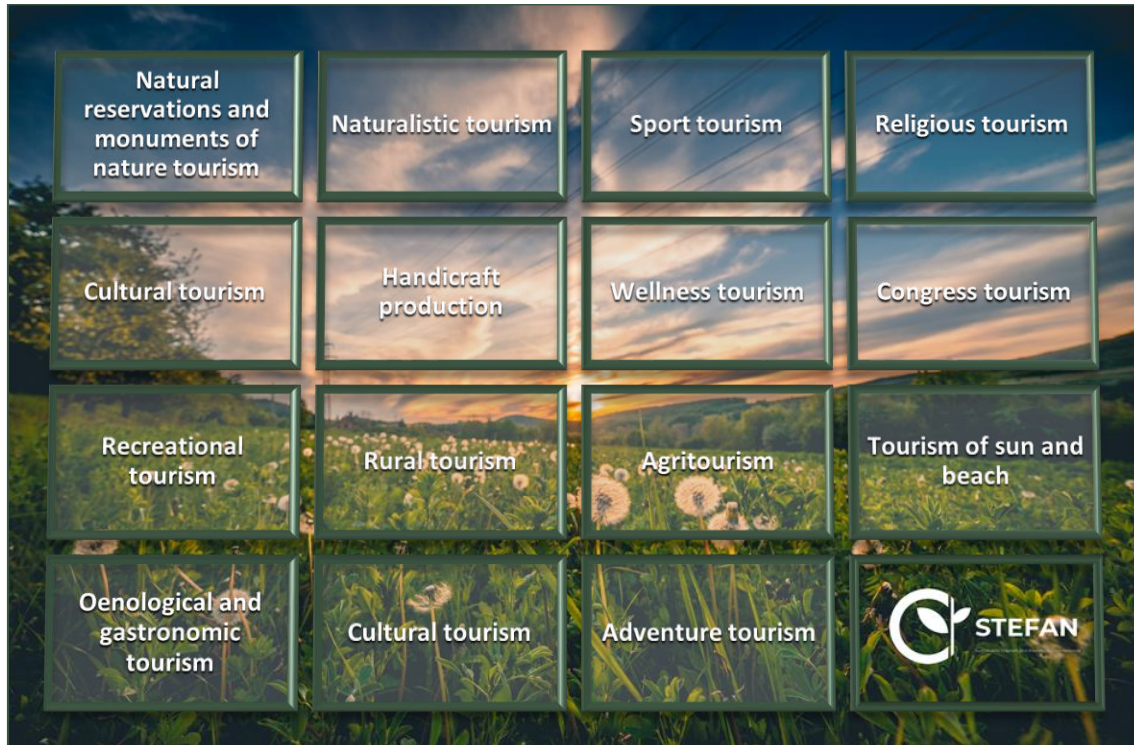


- **Ecotourism products based on the use of natural resources in urban or non-natural environments**, or carrying out activities related to natural resources or under sustainability guidelines in any other environment; or even traditional tourism transformed under the values of ecotourism and sustainability.

Although the variety of ecotourism or sustainable tourism products in Europe is as wide as the variety of its natural resources, social and economic environments, or tourism tradition, at STEFAN Project we have observed that for the most part, the sustainable



tourism market and products that backbone it are variations of the same set of products; combined, modified, adapted to a local environment, needs, or a specific objective; but with an indisputable common essence.



That is why, starting from this common nucleus of ecotourism products existing today in Europe, it's easy to understand the importance of the ecotourism and sustainability guidelines under which previous products are adapted, or under which new products or tourism packages are designed, set or established, as a combination or derivation of these.

A good part of the success and potential growth of ecotourism in Europe, as well as its integration in each environment, society, market, depends on the good definition of this framework for its local application, and its consistency in terms of sustainability and ethics., depending on each set of resources.

It should be noted that, in the absence of stable and transnational regulations, it's easy to find local or even partial applications of the existing "Technical Guidelines" to be a "Sustainable Destination" according to EUROPARC criteria.

These indications and these criteria are applicable to the majority of existing options in the application of the previous scheme in different environments of Europe, and their

consideration is and must be an essential starting point when defining the design, creation or commissioning framework. of current ecotourism products.

Consequently, in any of the previous lines you can find specific products that -by obligation, or as a mere option- assume the materialization of the indications of the **“European Charter for Sustainable Tourism in Protected Areas”**.

Therefore, the European Charter for Sustainable Tourism in Protected Areas is not only a seal of quality, but it’s also:

- Participatory planning tools.
- A concrete commitment of the managers of the natural area, the tourist companies and the tour operators to achieve the sustainability of the tourist activity.
- Internal evaluation processes.
- A European brand of excellence in sustainable tourism development.

Its implications, guidelines and point of view are a model that can be assumed as basic when considering sustainable ecotourism products in Europe.

In the same way, we recommend enriching this perspective, and making it more flexible and adaptable, taking into account the conclusions of the ECOLNET, “European Ecotourism Labeling Standard”, which establishes assessable quality criteria for ecotourism products.

At the same time, it should be noted that the application of this theoretical framework must be taken **taking into account two very important circumstances**:

- The local application of its guidelines in environments of unprotected spaces must be carried out from an adaptation perspective without this leading to renouncing the fundamental principles of ecotourism.
- This application must generate a meeting point between supply and demand, from the point of view of ecotourism, which in addition to making it sustainable in environmental terms, makes it viable and even sustainable from a social or business point of view.

Additionally, this meeting point between supply and demand, as a context for the development of ecotourism products, must take into account that for some years now tourists have become more aware of leaving a positive impact on the destinations that they visit. According to the Forum for the Futures, estimated that 66% of travellers wanted an easier way to identify a green holiday. In a 2018 Booking.com survey, 87% of

global travellers said they wanted to travel sustainably. Euronews even suggests an ecotravel boom in Europe.

But ecotourism products must take advantage of this boom by assuming a transversal perspective of their configuration: a solvent ecotourism product must not only assume specific natural resources, and / or their conservation, but conditions for accommodation and enjoyment.

It is not only the type of holiday that shows signs of change, but accommodation types as well. According to Booking.com, interest in a sustainable accommodation increased from 62% in 2016, to 65% in 2017 and 68% in 2018; meanwhile, the proportion of travellers who have not considered eco-friendly stays because they were unaware of their existence declined from 39% in 2016, to 38% in 2017, to 31% in 2018. These studies' results are in line with the outcomes of a survey among the readers of Condé Nast Traveler, which showed that 58% said they choose a hotel based on whether the hotel gives back to local people and the planet.

This should lead us to take ecotourism products from a comprehensive perspective, and not just as additional characteristics, or taking one of its elements in isolation, such as the destination or the activities.

Ultimately, this must respond to an ecological and sustainable need on the planet, while responding to the concerns of citizens in general, and tourists in particular. According to Booking.com tourists report:

- Being impressed by natural sights during their own travels (60%).
- Noticing a visible impact of tourism at the destinations they have visited (54%).
- Seeing the positive effect that sustainable tourism can have on locals (47%).
- Seeing the unsustainable effects of tourism in their home country (42%).
- Feeling guilty about the impact their vacation has had on the environment (32%).

In summary, it's a comprehensive perspective that, assuming the fundamental values of ecotourism, and the materialization of some guidelines that ensure a certain quality and respect for the environment, such as those dictated by the European Charter for Sustainable Tourism in Protected Areas, or the ECOLNET, configure ecotourism products that combine the usual activities and or/environments, being able to adapt these guidelines to their local environment, configuring a powerful and var

# 2

## 2. DESK RESEARCH IN EACH PARTNER COUNTRY

## 2.1. Ecotourism in the CZECH REPUBLIC

In 1980, the concept of ecotourism in the Czech Republic was completely unknown, but with the growing interest in the environment and ecology, so did grow the interest of ecotourism itself, which currently accounts for 7% of tourism.<sup>28</sup>

The Czech Republic has been slow to encourage and adopt sustainable tourism practices. Part of the blame, like everything else, goes to Communism. For 40 years from 1948 to 1989, industries, roads, and vast public housing tracts were built up with scant concern for their effect on the environment. By the time of the Velvet Revolution in 1989, the city and country were on a downward ecological spiral. Large areas in the north of the country had been destroyed by strip mining and acid rain produced by rampant coal burning.<sup>29</sup>

But things have changed since then, the country works well to support sustainable travel and the Czech Republic was even ranked by the UN as the 7th in the world for progress towards sustainable development goals in 2019.<sup>30</sup> The Czech Republic is one of the top ten countries in Europe in the field of nature protection. Of the total area of the Czech Republic, which is 79,000 km<sup>2</sup>, 16% (15.85%) is protected. Of these, less than 16% are 4 national parks, 25 protected landscape and 4 categories of small specially protected areas area.<sup>31</sup>

### 2.1.1. Domestic and international demand

Tourism demand for travelling to the Czech Republic has been increasing annually. Before the pandemic hit, the year 2019 has been a record year for the number of accommodated tourists, with 22 million guests being accommodated in domestic hotels,

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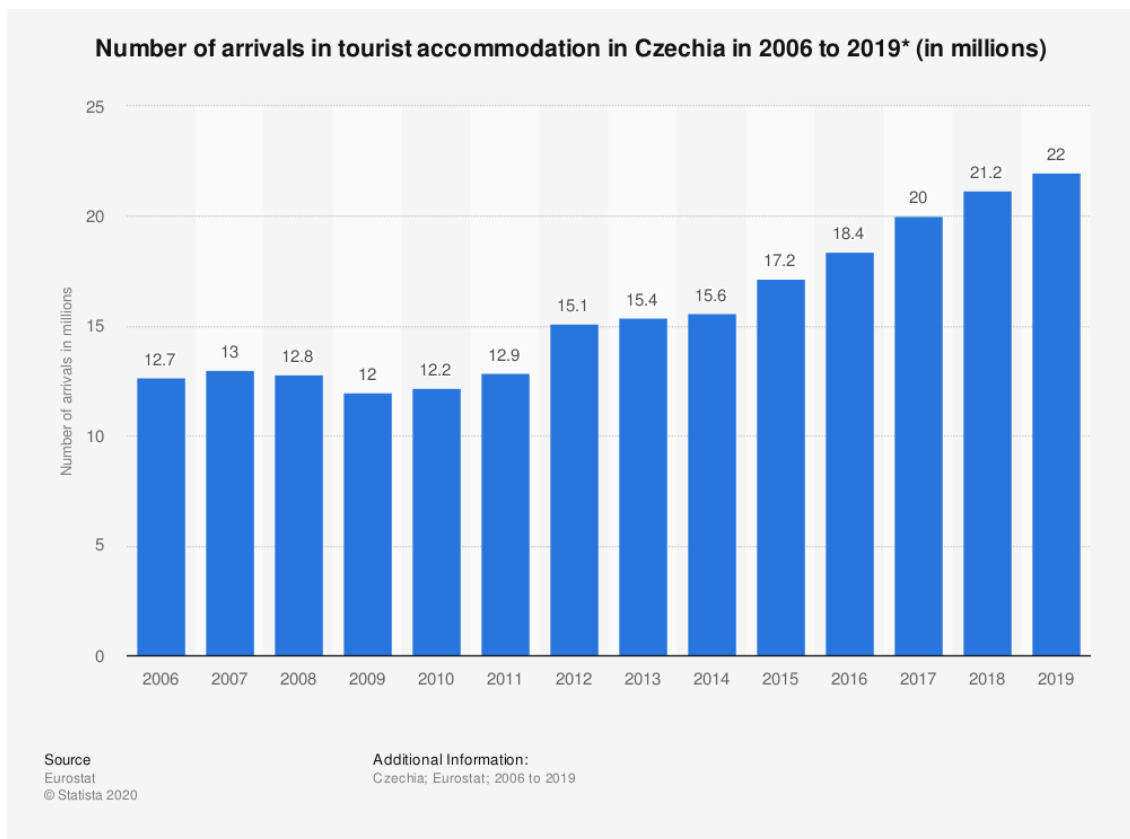
<sup>28</sup> <https://is.muni.cz/th/lur0x/bakalarka-ekoturistika.pdf>

<sup>29</sup> <https://www.frommers.com/destinations/prague/planning-a-trip/sustainable-travel--ecotourism>

<sup>30</sup> <https://www.travelmarketreport.com/articles/Czech-Sustainable-Tourism-A-Commitment-to-Local-Character>

<sup>31</sup> [https://dspace5.zcu.cz/bitstream/11025/12600/1/BP\\_Marketa\\_Sediva%20Specificke%20typy%20cestovniho%20ruchu.pdf](https://dspace5.zcu.cz/bitstream/11025/12600/1/BP_Marketa_Sediva%20Specificke%20typy%20cestovniho%20ruchu.pdf)

boarding houses and camps.<sup>32</sup> Year-on-year, domestic attendance increased by more than eight percent, foreign attendance by 4.7 percent. Over 10.6 million foreigners came to the Czech Republic last year, 550,000 more than in the previous year.<sup>33</sup> The research of the CzechTourism agency showed that 88% of foreign visitors to the Czech Republic in 2018 were residents of European countries and among them mainly residents of neighboring countries, mainly Germany (34%) and Poland (12%). Foreign tourists in the Czech Republic are mainly attracted by cultural monuments. Foreign excursionists (one-time visitors) then gastronomy and hiking.



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Domestic tourists are interested in cultural monuments, hiking, and a quarter also go to visit relatives. People come to the cultural monuments mainly to Prague, but also to the

<sup>32</sup> [https://www.irozhlas.cz/zpravy-domov/rekordni-turismus-ceska-republika\\_2002071548\\_sot](https://www.irozhlas.cz/zpravy-domov/rekordni-turismus-ceska-republika_2002071548_sot)

<sup>33</sup> <https://zpravy.aktualne.cz/ekonomika/vysledky-turismu-za-rok-2018/r~e380ff782ab811e9b7ed0cc47ab5f122/>

<sup>34</sup> <https://www.statista.com/statistics/413213/number-of-arrivals-spent-in-short-stay-accommodation-in-the-czech-republic/>

Vysočina Region, to the South Bohemian and Karlovy Vary regions. The South Moravian Region attracts visitors to gastronomy, active tourism is again the most popular in the Liberec Region. The Karlovy Vary region is, of course, a unique spa, but it is also attractive thanks to hiking. Rural tourism is most popular in the Vysočina Region.<sup>35</sup>

## 2.1.2. Tourist destinations

One of the most visited places in the Czech Republic is the capital city **Prague**. The city has taken big steps toward cleaning up the air and the river. Much of the city is now heated by natural gas, not coal, leaving the air much cleaner in the winter months - though a huge increase in car ownership has mitigated some of these gains. Sewage is now treated before it's released into the river. The water is still too polluted to swim in, but every year brings an improvement in water quality.<sup>36</sup> There also exists a concept named Prague City Tourism, aims at sustainable tourism along with the quality of the life of Praguers.<sup>37</sup> The concept addresses the issues experienced in the city center which has long been overwhelmed with street traffic and tourist overcrowding. The economic activity has focused exclusively on visitors managing to push out urban functions of daily use for residents and replace them with functions and services aimed exclusively at tourists, in the opinion of the authorities. On the contrary, the new concept puts the quality of life of local residents in the first place. It also emphasizes the cultural heritage and uniqueness of Prague and wants to create the conditions for sustainable tourism in the city. One of the practical ways to create sustainable tourism experiences is by creating new routes leading outside the city center which is already happening. The authorities are also working on smart tourism application that will collect data on tourism preferences, offering connected services.<sup>38</sup>

As previously mentioned, beautiful nature can be found in the Czech Republic, offering many places for ecotourists to visit. One of the examples are the sculpted rocks and lush greenery surrounding the hiking trails of **Bohemian Switzerland**, which earned the title

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<sup>35</sup> <https://www.statistikaamy.cz/2019/08/13/tracking-prijezdoveho-a-domaciho-cestovniho-ruchu/>

<sup>36</sup> <https://www.frommers.com/destinations/prague/planning-a-trip/sustainable-travel--ecotourism>

<sup>37</sup> <https://news.expats.cz/weekly-czech-news/prague-launches-new-plan-for-sustainable-tourism-quality-of-life-for-residents/>

<sup>38</sup> <https://www.themayor.eu/en/prague-redefines-its-tourism-strategy-with-a-focus-on-sustainability>

of a European Destination of Excellence for authenticity, diversity, and sustainability. **The Lipno Treetop Walkway** offers forest views from over 130 feet (40 meters) in the air, meticulously designed to complement and support the surrounding area.<sup>39</sup> Lipensko is also a cycling paradise, and an in-line skating track runs parallel to the banks of Lipno Lake.

**Bystřicko**, on the other hand, was selected as the "water" tourist destination. This one-of-a-kind natural park with brooks and streams is ornamented with mysterious ruins, castles, and lookout towers. It is a cyclist's, hiker's, and nature lover's paradise.

For fans of original folklore there is **Slovácko**. Rich folk traditions, such as the Ride of the Kings or the Verbuňk dance, can be encountered everywhere you go, and you can admire the picturesque landscapes interwoven with vineyards and historical monuments in this corner of Eastern Moravia.

Another great place for ecotourists are the **Jeseníky Mountains**. Jeseníky are known for their excellent food, but also for the wild beauty of this Silesian mountain range as well as for its air, which is some of the cleanest in all of Central Europe.<sup>40</sup>

There are places in the Czech Republic that for years, and perhaps even decades, have been neglected. However, thanks to efforts for the preservation of monuments and sustainable tourism, considerable resources have been invested so that these places can be saved. One of these places is the baroque complex of **Hospital Kuks**. After many years of efforts, organisers saved this complex from gradual deterioration, and were able to repair it. Today, visitors to the complex can delight in the fact that the Hospital looks exactly as it did when it was in its heyday. Even **Chateau Hill in Eastern-Bohemian Litomyšli** finally got the revitalisation it deserves.<sup>41</sup>

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<sup>39</sup> <https://www.travelmarketreport.com/articles/Czech-Sustainable-Tourism-A-Commitment-to-Local-Character>

<sup>40</sup> <https://www.visitczechrepublic.com/en-US/cc2f8a17-5cba-4bb0-a4aa-6d9779b9a069/article/n-year-of-sustainable-tourism>

<sup>41</sup> <https://www.visitczechrepublic.com/en-US/cc2f8a17-5cba-4bb0-a4aa-6d9779b9a069/article/n-year-of-sustainable-tourism>



### 2.1.3. Key domestic actors

The **government of the Czech Republic** has a sustainable development strategic framework overviewed by the Office of the Government of the Czech Republic, Department of Sustainable Development Strategic Framework. It also has The Government Council for Sustainable Development of the Czech Republic, chaired by the Prime Minister, is an advisory body to the Government responsible for inter-sectoral coordination of the sustainable development policy among central administrative authorities. It consists of the representatives of all ministries, both chambers of the Parliament, municipalities, NGOs, trade unions, academia, industry, agriculture and research. Other relevant stakeholders are represented in its nine thematic Committees and working groups.<sup>42</sup>

Next there is **ACCKA** - The Association of Tour Operators and Travel Agents of the Czech Republic. a national non-profit association that was founded in 1991 and today represents more than 240 businesses in the tourism sector. Our full members are tour operators and travel agents engaged in both inbound and outbound travel. Foreign travel agents, hotels, Tourist boards and commercial companies that provide services for our members can become affiliated members. The principal objectives of ACCKA are to represent and promote the interests of the tourism industry, especially the interests of travel agents and tour operators. In practise this means that ACCKA monitors and follows up issues of a legal, economic or technical nature relating to the tourism industry in the Czech Republic. Representatives of ACCKA are invited to participate in a consultation process during the preparation of national tourism-related legislation.<sup>43</sup>

**The Czech tourists club** is a civic association of active tourists, friends and supporters of tourism. Their mission is to create tourist programs and conditions for safe and free movement in nature, take care of cultural monuments and take care of nature and landscape. Czech tourists club takes care of marking and maintenance of marked tourist routes (walking, running and cycling). The Czech Tourists Club is grouped into 14 areas,

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<sup>42</sup><https://www.vlada.cz/en/ppov/council-for-sustainable-development/the-government-council-for-sustainable-development-of-the-czech-republic--153075/>

<sup>43</sup> <https://en.accka.cz/stranky/about-association/an-introduction-to-accka>

which are identical with the region. It publishes tourist magazines, maps, professional literature and children and youth in the Association of Tourist Sections youth A-TOM.<sup>44</sup>

**The EDEN project** (European Destinations of Excellence) refers with its focus and selected topics to the issue of sustainable tourism development. It is a project of the European Commission with the main goal to support lesser-known destinations with an active approach to sustainable tourism in the European Union. The Czech Republic has been participating in the project since 2009 and since then 7 winners have received this prestigious award. The national coordinator of the competition is the CzechTourism agency. The project involves 27 countries of the European Union, which are continuously involved in the announced COSME projects with the financial support of the European Commission. The main content of the project is a competition for an excellent tourist destination. The competition year is repeated once every two years, each time on a different topic related to sustainable tourism.<sup>45</sup>

#### 2.1.4. EcoTourism Offers

The position of the Czech Republic in the middle of European lowlands, hills and high mountains is reflected in its remarkable geological and biological diversity. There are various forest-steppe areas, wetlands and peat bogs, large complexes of deciduous and coniferous trees, karst areas, sandstone rock towns and mountains. These areas are especially suitable for hiking, nordic walking or wildlife observation.<sup>46</sup>

- **Hiking** - hiking has a long tradition in the Czech Republic, it began to develop in the middle of the 19th century. The Czech Republic has great hiking conditions thanks to the numerous natural areas and the rugged relief of our country.
- **Cycling** - cycling in the Czech conditions has great preconditions for development. The landscape has a rugged relief, picturesque natural beauty and countless cultural monuments. The marking of bicycle paths in our territory is at a very high level.

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<sup>44</sup>[https://dspace5.zcu.cz/bitstream/11025/12600/1/BP\\_Marketa\\_Sediva%20Specificke%20typy%20cest\\_ovniho%20ruchu.pdf](https://dspace5.zcu.cz/bitstream/11025/12600/1/BP_Marketa_Sediva%20Specificke%20typy%20cest_ovniho%20ruchu.pdf)

<sup>45</sup> <http://www.eden-czechtourism.cz/o-projektu-eden/>

<sup>46</sup>[https://dspace5.zcu.cz/bitstream/11025/12600/1/BP\\_Marketa\\_Sediva%20Specificke%20typy%20cest\\_ovniho%20ruchu.pdf](https://dspace5.zcu.cz/bitstream/11025/12600/1/BP_Marketa_Sediva%20Specificke%20typy%20cest_ovniho%20ruchu.pdf)

- **Greenways** – greenways are routes, roads or natural corridors used in accordance with their ecological function with the potential for sport, tourism and recreation. Most often these are routes of local importance, other times long-distance routes.
- **Cross country skiing** – cross country skiing is a very popular winter activity in the Czech Republic. There are many routes and it is a great way to get to experience nature in a sustainable way.
- **Water tourism** – canoeing is a very popular holiday activity in the Czech Republic. Water tourism is operated on several larger rivers: Vltava, Berounka, Ohře, Sázava, Lužnice, Otava and Morava.<sup>47</sup>

### 2.1.5. Accommodations

The type of sustainable accommodation for ecotourists differs with destination they travel to in Czech Republic. In Prague there are mostly modern hotels, in which the price ranges from 36€ to 66€ per night. One of the most known is the Mosaic House, which offers eco-friendly accommodation. It was the first hotel in the Czech Republic to use only renewable energy and it's also one of the first in the world to use a grey water system with heat recuperation. In essence, that means it extracts the heat from hot wastewater and uses it to warm up the new water.<sup>48</sup>

However, there are other hotels worth mention. Chateau Mcely is only the second five-star hotel to earn the right to use the European Union's Eco Label. The hotel, which belongs to the Small Luxury Hotels of the World, is situated in the Czech Republic's legendary St. George Forest located just one hour outside of Prague. The resort is also a great place for weddings and honeymoons. Hotel Adalbert is an eco-hotel near the Brevnov monastery in Prague. The newly reconstructed baroque building provides comfortable accommodation in an eco-friendly environment. MaMaison Residence Belgicka has been awarded the European Union Eco label. The hotel offers accommodation in several Art Nouveau buildings in the trendy Vinohrady district. It consists of 30 elegantly furnished apartments in contemporary style. Hotel Adria Praha has been striving to be environmentally friendly for several years. Adria is a first four-

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<sup>47</sup> <https://is.muni.cz/th/lur0x/bakalarka-ekoturistika.pdf>

<sup>48</sup> <https://www.wouldbetraveller.com/eco-friendly-accommodation-in-prague-mosaic-house/>

star hotel in Prague holding the EU Eco label. In Pilsen, tourists will find eco-friendly Hotel Irida; Sporthotel Zaton is close to the UNESCO World Heritage town Cesky Krumlov.

Agrotourism offers travelers an opportunity to connect with daily life in a rural countryside or stay on a farm to gain firsthand experience on agricultural life in the Czech Republic. At Belina organic farm, visitors may taste organic products made from locally grown produce and participate in educational events, such as weaving baskets from rattan and processing of sheep's wool using traditional techniques. Sasov organic farm has begun to produce feed crops, buckwheat, potatoes, onions and soya. One of the farm's popular products is organic salami known as "biouherak." Guests can stay at an organic Javorice Lhotka organic farm and have the opportunity to taste honey and sheep products, apples, pears, cherries, rowanberries, fruit ciders and liquors.<sup>49</sup>

### **2.1.6. Tourist packages**

There are several tourist packages in the Czech Republic and they differ based on these characteristics: destination area or territory, Guided or independent tourism, type of accommodation and type of gastronomy and associated services. The packages are not really different in marketing from traditional packages, even though they differ in offering sustainable alternatives in accommodation etc.

The packages in most include a combined tour of several central and eastern European cities like Prague, Vienna, Budapest, Berlin etc. However, tours only of Czech Republic can be found as well. The packages can be either sightseeing tours, meant to show important sights in the cities or cycling tours, where you for example cycle alongside rivers from one destination to another. These tours mostly last 3-4 days and usually include spending one day in each city, sometimes without spending the night.<sup>50</sup>

#### ***Types of the tourist products***

Sustainable tourism in the long run of its implementation does not disrupt the natural, cultural and social environment. The main principles of such tourism are the protection

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<sup>49</sup> <http://www.travelworldnews.com/czech-republic-ecotourism-is-a-natural-in-the-czech-republic/>

<sup>50</sup> <https://www.responsibletravel.com/holidays/czech-republic?search=y>

of the environment, the preservation of biodiversity, respect for the lifestyle of local people and ensuring a viable economy. The involvement of many tourism actors (state and local government bodies, local population, etc.) is a basic starting point for the protection of natural and cultural values of the territory and the planning of tourism development.

There are 5 principles of sustainable tourism under the European Charter:

- **Giving priority to protection** - a fundamental priority for the development and management of sustainable tourism should be to protect the area's natural and cultural heritage and to enhance awareness, understanding and appreciation of it
- **Contributing to sustainable development** - sustainable tourism should follow the principles of sustainable development which means addressing all aspects of its environmental, social and economic impact in the short and long term
- **Engaging all stakeholders** - all those affected by sustainable tourism should be able to participate in decisions about its development and management, and partnership working should be encouraged
- **Planning sustainable tourism effectively** - sustainable Tourism development and management should be guided by a well-researched plan that sets out agreed objectives and actions
- **Pursing continuous improvement** - tourism development and management should deliver ongoing improvement in sustainable environmental impacts, visitor satisfaction, economic performance, local prosperity and quality of life, requiring regular monitoring and reporting of progress and results <sup>51</sup>

From the point of view of the application of the principles of sustainability to tourism and its products, it is necessary to ensure a more optimal distribution of tourism participants in time and space, especially in connection with the schedule of paid holidays and school holidays. A more optimal distribution of visitors will reduce the pressure on the environment and will have a positive effect on the tourism industry and the local economy. Infrastructure and tourism activities should be planned in such a way as to ensure the conservation of the natural heritage, in particular individual ecosystems and biodiversity, and to ensure the protection of endangered species of fauna and flora. Those interested in the development of tourism, in particular entrepreneurs, should

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<sup>51</sup> <https://www.europarc.org/sustainable-tourism/charter-principles/>

comply with 16 restrictions arising from operating in particularly sensitive desert, polar, coastal or alpine areas, tropical forests or wetlands, especially if those areas are likely to become nature reserves or protected areas. Hiking and ecotourism are considered to be activities that make a particular contribution to the enrichment and empowerment of tourism, but only if they do not disturb the natural heritage and life of the local population and do not exceed the tolerable load of the area.<sup>52</sup>

### **2.1.7. Best practices**

Opportunities in tourism in the Czech Republic are mainly in the increase of interest of foreign tourists in the Czech Republic. Thanks to the access to historical monuments and their inclusion in the UNESCO list, the Czech Republic is slowly gaining ground abroad as an attractive location for holidays in hiking or biking. Another opportunity is the promotion of new technologies, trends in tourism and capturing new market segments. An opportunity for the Czech Republic is also the use of grants and support for programs in tourism, the arrival of new investors in the Czech Republic in the hotel industry. Currently, the demand for Czech Ornithological Society is growing.

The threat is the perception of the Czech Republic as an unattractive destination in terms of ecotourism holidays and the lack of capital for the development of ecotourism in tourism. Another threat is the tendency to expand tourism to protected landscape areas and national parks in terms of environmental damage. In the Czech Republic, we underestimate the human factor in terms of insufficient education of people in the field, there is still a low professional level, insufficient counseling services and poor-quality infrastructure. The increase in leisure virtual activities is also a threat. The strengths of the Czech Republic, from the point of view of tourism, is the advantageous geographical location. There is a dense network of marked hiking trails and bike paths throughout the Czech Republic and the development of these forms of tourism also contributes to the diversity of the landscape.

In the Czech Republic there are a sufficient number of attractive locations for tourism and use from the point of view of ecotourism. The strong point is also the positive image that the Czech Republic has created in neighboring countries.

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<sup>52</sup> [https://is.vsh.cz/th/I9jmm/DP\\_Daria\\_Dychko.pdf](https://is.vsh.cz/th/I9jmm/DP_Daria_Dychko.pdf)

Weaknesses are the lack of funds for the maintenance of cultural, historical and natural monuments. Weak language skills of staff working in tourism services, insufficient promotion in the country and abroad, very low usability of accommodation facilities and poor-quality transport network to tourist destinations. There is a small share of eco-friendly forms of tourism, including ecotourism, in the field of tourism. In the Czech Republic, the competitiveness of ecotourism is low, due to ignorance of this form. The reason is also the weak presentation of the Czech Republic at world fairs and on the Internet.

### **Strategic goals for the development of ecotourism in the region of the Czech Republic:**

- Creating a new strong image of the state in the tourism sector as a destination specific, especially for nature tourism, and the associated ecotourism.
- Creating a program for investors where the Czech Republic is a suitable country for ecotourism.
- Increasing professional and educational guide services in the field of ecotourism and sustainable tourism.
- Expanding the network of tourist and educational centers and publishing multilingual brochures for tourists.
- Development of systems of walking, cycling and running routes as active forms of ecotourism.
- Creating effective protection for valuable natural areas increasing the attractiveness of the Czech Republic in terms of ecotourism.<sup>53</sup>

#### **2.1.8. Legal framework**

There is no official legislation concerning the regulation of ecotourism in the Czech Republic, it is based only on unofficial principles.

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<sup>53</sup> <https://is.muni.cz/th/lur0x/bakalarka-ekoturistika.pdf>

### ***Twelve basic goals of sustainable tourism***

- 1. Economic responsibility:** ensuring the viability and competitiveness of tourist destinations and businesses so that they can prosper in the long run and bring benefits.
- 2. Local prosperity:** maximizing the contribution of tourism to the prosperity of the host destination, including the share of visitors' expenditure.
- 3. Quality of employment:** strengthening the number and quality of local jobs created and supported by tourism, including the level of remuneration, conditions of service and accessibility for all without discrimination based on sex, race, disability or otherwise.
- 4. Social ownership:** working to extend the economic and social benefits of tourism to the whole recipient community, including improving the opportunities, incomes and services available to the poor.
- 5. Overall visitor experience:** ensuring a safe, satisfying and fulfilling visitor experience that is available to all without discrimination based on sex, race, disability or otherwise.
- 6. Local control:** involvement of the local community in local planning and decision-making on the management and future development of tourism in their area, in agreement with other stakeholders.
- 7. Welfare of society:** maintaining and strengthening the quality of life of the local population, including social structures and the health care system, avoiding any form of social degradation and exploitation.
- 8. Cultural richness:** respect and enrichment of historical heritage, authentic culture, traditions and unity of the host communities.
- 9. Physical integrity:** maintaining and improving the quality of the landscape, both urban and rural, and preventing physical and visual deterioration of the environment.
- 10. Biodiversity:** supporting the protection of natural areas, habitats and wildlife and minimizing their damage.
- 11. Resource efficiency:** minimizing the use of scarce and non-renewable resources for the development and operation of tourist facilities and services.
- 12. Environmental protection:** minimization of air, water and soil pollution and waste management of tourist companies and visitors.<sup>54</sup>

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<sup>54</sup> [https://is.vsh.cz/th/I9jmm/DP\\_Daria\\_Dychko.pdf](https://is.vsh.cz/th/I9jmm/DP_Daria_Dychko.pdf)



### ***The sustainable development strategy***

The sustainable development strategy is historically conditioned and will evolve, complement and change over time. Its basic role is to draw attention in time to existing and potential problems that could threaten the transition of the Czech Republic to sustainable development, and to initiate measures to prevent these threats or at least mitigate their impact and address their potential consequences as effectively as possible. It is in an unfavorable case a reaction to an emergency situation, in a favorable case an optimization of the development within the given limits. Sustainable development is comparable to other systems of values, such as the system of human rights and freedoms, which do not have a final form, but must be interpreted and re-specified within a given historical context. Sustainable development must be understood as a "normative" idea, a constant challenge stimulating the social process of learning and self-organization. In addition to overcoming objective material disparities, it is necessary to take into account that the realization of the vision will also have to overcome the barriers of social psychological stereotypes. This includes both consumer habits and preferences, as well as the belief that science and technology will ensure the solution of objective disparities without changing the behavior and attitudes of individuals. At the same time, it must be borne in mind that failure to adapt society, both at European and global level, to the environmental, economic and social constraints identified may jeopardize the stability of the social system.<sup>55</sup>

### ***Strategic goals of sustainable development strategy***

- maintain the stability of the economy and ensure its resilience to negative influences
- support economic development respecting the carrying capacity of the environment and ensuring sustainable financing of public services (sustainable economy)
- develop and comprehensively support the knowledge and skills economy and increase services
- ensure the good quality of all components of the environment and the functioning of their basic connections and harmonious relations between ecosystems in the Czech Republic

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<sup>55</sup> [http://www.mmr.cz/getmedia/b973337b-cccc-42a3-9d19-2b23356dcff2/getfile15\\_1.pdf](http://www.mmr.cz/getmedia/b973337b-cccc-42a3-9d19-2b23356dcff2/getfile15_1.pdf)

- preserve the natural wealth of the Czech Republic to the highest economically and socially acceptable so that it can be passed on to future generations, and to preserve and not reduce biodiversity
- systematically promote recycling, including building materials (reducing landscape exploitation and consumption of imported raw materials)
- minimize conflicts of interest between economic activities and the protection of the environment and cultural heritage, tangible and intangible
- ensure the protection of non-renewable natural resources (including the agricultural land fund)
- maintain the strategic food self-sufficiency of the Czech Republic
- defend and promote the national interests of the Czech Republic in the broadest international relations, major international organizations and bilateral relations
- achieve international fulfillment of the Czech Republic
- to contribute to solving key global problems of sustainable development
- maintain a stable population of the Czech Republic and gradually improve its age structure
- permanently reduce unemployment to the level of economic and social motivation of people to engage in work activities
- support human resources development and achieve maximum social cohesion
- ensure the constant growth of the level of education in society, including education in culture, and thus ensure the competitiveness of Czech society
- develop ethical values in accordance with European cultural traditions
- maintain appropriate forms of cultural diversity, rural life and agglomerations, ensure cultural diversity and lifestyle diversity
- ensure equality of communities, accessibility of services according to their different life needs and priorities
- make culture accessible to all people, especially with regard to the fact that culture is an essential part of a knowledge-based society and development factor, municipalities and regions
- support the development of public services and social infrastructure enable public participation in decision-making and strategy development on sustainable development issues and build the widest possible consensus on the transition to sustainable development,
- prevent the strengthening of lobbying and activist groups interests for the interests of sustainable development and thus justified to promote them against the interests of the whole

- increase the efficiency of performance and improve the activities of public administration in accordance with the requirements of sustainable development
- take measures to ensure external and internal security that would reflect protection requirements and changing forms of crime, including international crime and, in particular, terrorism<sup>56</sup>

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<sup>56</sup> [http://www.mmr.cz/getmedia/b973337b-cccc-42a3-9d19-2b23356dcff2/getfile15\\_1.pdf](http://www.mmr.cz/getmedia/b973337b-cccc-42a3-9d19-2b23356dcff2/getfile15_1.pdf)

## 2.1.9. Results of interviews in Czech Republic

The parts involved in the questionnaires were one destination management company, one agritourism company, one national park and one public administration institution, all located in Czech Republic.

### **Summary of destination management company questionnaire**

The destination management company that participated in the questionnaire was the OK- TOURS, a.s.. The company is located in Prague, Czech Republic, and its main focus is to provide travel services for both leisure traveling and business trips. They provide comprehensive travel assistance starting from the booking of airplane tickets to the destination management. The highest share of customers which turns to the company services is composed for 80% by foreign clients, mainly from Romania, Canada and Sweden.

For the purposes of the interview the questionnaire was submitted to an employee of the company, Daniel Kotrč.

### ***Ecotourism products***

According to the opinion of the interviewed, the main products falling within the category of ecotourism offered by the company include different outdoor activities among which hiking, trekking, biking, mountain bike, horse riding and sky cross country.

The most suitable areas to practice ecotourism are the Šumava National Park, the Krkonoše Mountains National Park and the region of South Moravia.

Moving to the preferences of domestic travellers for ecotourism products, Daniel Kotrč suggested that the preferences underlying the main interest of the customers are hiking, trekking, biking, mountain biking and ski cross country. While the activities that have a less attractive force are horse riding wildlife watching, fishing, rural tourism, and caving. None of the products listed were included to be registered as non-interesting. While concerning the preferences of foreign tourists the activities that scored the highest level of interest were biking, mountain biking and following hiking, trekking, and caving. While the activities that registered a milder interest were horse riding, fishing, ski cross country followed by wildlife watching and rural tourism. Also, in this case none of the products was listed as not interesting to the tourists.

Before the Covid pandemic hit Europe, the sales of eco-tourism products registered according to the interviewed very positive results. This data is due to the commitment of the company of realizing travel experiences tailored on clients' preferences and wishes. The main requests they had to fulfil included more city breaks and cultural heritage-based trips, rather than ecotourism activities.

### ***Problems encountered in the preparation of ecotourism packages***

Regarding the problems encountered by the agency when preparing the packages, the main issue underlined was the low quality of local transports, which could influence the preference of a destination or of an activity rather than another. Issues less problematic were given by the accommodation, which, given the small capacity of hotels, could not absorb a high demand during the whole year by local tourists; and by the promotion, given the fact that a more encouraging advertising and an aggressive marketing is still missing. At the same time problems seemed not to be connected to complementary services.

Concerning future plans to be implemented in the short term, the agency is preparing to offer Nordic-walking and hiking, and camps for children.

### ***Training***

With regard to the help that a training practice would bring to overcome the problems related to the preparation of ecotourism packages, the interviewed affirmed that this approach would not bring any help. In fact, as it emerged, the main problems they face are related to structural problems such as accommodation, transports, and the small capacity of hotels and rental houses. Problems that are therefore not connected to the fact that tourists are not accustomed to ecotourism and what it includes. However, for Daniel Kotrč, training could prove itself useful to enhance the knowledge of languages.

The interviewed, when asked about his thoughts about online training, showed a positive attitude. According to him, this could be a great instrument to deliver courses.

### **Summary of agritourism company questionnaire**

The agritourism company involved in the interview was the Vinař Jiří Uherek winery. The questionnaire was submitted to the CEO of the company Jiří Uherek.

The company is located in Dolní Bojanovice, Czech Republic, and merges the tradition of wine making with the possibility of enjoying a touristic experience in the vineyards, even

though limited to a little number of visitors, in fact the maximum capacity of the facility is of a total of 13 beds.

### ***Ecotourism products***

The interviewed affirmed that the activities offered to tourists by his company cannot be included to offer ecotourism products as such. However, the main activities that they offer to clients include hiking, trekking, biking, fishing, rural tourism and local gastronomy discoveries.

The main areas that resulted more suitable for ecotourism emerged to be mountains and natural parks.

Before Covid-19, the situation of tourists' interest in farmhouses was registered as good.

### ***Problems encountered in collaborating with other tourism companies***

According to Jiří Uherek the main problem faced when collaborating with other tourism companies was the promotion, while he registered no problems with accommodation and local transports and little problems with complementary services.

In addition to this relating to future implementation projects, the interviewed affirmed that there are no plans related to ecotourism.

### ***Training***

The agritourism company in case is not interested in reaching a wider range of tourists and so the CEO does not deem important to be involved in any kind of training, neither if offered online, in fact, any kind of training has never been offered to employees of the company.

## **Summary of Natural Park questionnaire**

The association involved in the questionnaire is the Chrudim Region Local Action Group. The group was established in 2013 with the aim of supporting the sustainable development of its territory. With a community that includes people, municipalities, companies and non-profit organizations, the association acts as a local initiating, managing and controlling body. It supports projects of various entities that are in line with the territorial development strategy, also implementing its own development projects. The questionnaire was completed by Michaela Matěnová, member of the association.

### ***Ecotourism products***

The main ecotourism activities carried out in the region are hiking, trekking, biking and ski cross country.

According to Ms Matěnová, local visitors' most preferred activity is cross-country skiing, while the other activities enjoyed by locals are hiking, trekking, and biking to the higher extent, while horse riding, fishing, and rural tourism are just mildly preferred over wildlife watching and caving, that are of no interest to locals. On the contrary foreign tourists whilst enjoying as much as local hiking and trekking, they show a milder interest in biking, mountain biking, horse riding and fishing. While they are not interested in wildlife watching, rural tourism, caving and cross-country skiing.

No particular plans regarding ecotourism were listed by Ms Matěnová, which affirmed that the association is not planning any specific project related to ecotourism in the short term.

With regard to the relationship between the region and the ecotourism companies that work within the area, the level of cooperation is good, while the interviewed affirmed that the level of professionalism of ecotourism tour operators is low.

### ***Training***

Ms Matěnová deemed helpful the recourse to training to overcome the problems highlighted. However, online training according to her is not very effective, while face to face teaching is preferred as a more useful format.

The interviewed never took part to any kind of training nor training was ever offered to employees in the company.

## **Summary of Public Administration Questionnaire**

The public administration involved in the questionnaire was the Ministry of Regional Development of the Czech Republic (MRD CZ). On behalf of the Ministry, the questions were answered by Petra Stonawská, Head of the Tourism Department Unit.

### ***Goals of the institution and Ecotourism***

The main objectives of the Ministry according to the interviewed are the promotion of the development of the tourist sector, the support of tourism supply, and the strengthening of tourist products. In addition to those, the action of the institution is also dedicated to the development of destination management and promotion of

sustainable tourism, the enhancement of consumer protection and legislative development in tourism, and lastly the valorisation of tourism as a tool of regional development through the increment of benefits of sustainable tourism for the regions and the reduction of negative impacts of tourism.

Moving to MRD CZ goals towards Ecotourism, the main goals are the support of the development of sustainable forms of tourism, including ecotourism (eg. support for the introduction of certifications, infrastructure development, promotion, awareness raising, support for traffic monitoring and evaluation of the impact of tourism, cooperation with organizations operating in the field of sustainable tourism and ecotourism in the Czech Republic etc.).

In order to promote sustainable tourism, the institution uses financial and non-financial tools to promote sustainable tourism. Through State budget funds is financed the National support program for tourism in the regions, which includes two subprograms, namely the sustainable development of public tourism infrastructure and marketing activities in tourism, which includes destination management, and the State program of support of NGOs, which supports several activities including development of sustainable tourism on the national level.

The total allocation of budget programmed to support tourism in 2019 can be divided in three main areas. Tourism infrastructures received an allocation of 150 mil. CZK and granted a support of 78,4 mil. CZK financing 49 projects; Marketing activities received a total of 100 mil. CZK, granting a support of 16 mil. CZK to 17 projects, while the Support of NGOs in tourism initiative received 8 mil. CZK which was all invested in one project.

National support programs enable the realization of a great range of activities in sustainable tourism including ecotourism. However, a specific allocation for ecotourism was not mentioned.

### ***Ecotourism products***

According to the interviewed within the sphere of Ecotourism can be included hiking, wildlife watching, and rural tourism. The areas of the country that are more suitable to such form of tourism are rural areas, natural reserves and national parks, culture heritage sites including UNESCO sites, and geoparks.

In Ms Stonawská opinion, foreign tourists prefer to a bigger extent hiking, trekking, biking, mountain biking, rural tourism, and cross-country skiing over horse riding, wildlife watching, fishing, and caving, that might interest them slightly less. On the other side foreigners are highly interested in hiking, trekking, biking, mountain biking, rural



tourism, cross-country skiing, and enjoy horse riding, wildlife watching, fishing, and caving with a good interest.

The Ministry promotes sustainable tourism including ecotourism. It creates conditions for the development of activities in the field of sustainable tourism and ecotourism supporting, for example, the implementation of projects for the development of tourism infrastructure, the creation of tourism products and their marketing, the implementation of research tasks, or the creation of standards. MRD CZ also cooperates with professional organizations in the field of sustainable tourism and uses tools to support research funding, for example the Czech Technological Agency.

The interviewed when asked her orientation in relation to the different products, she showed a favourable orientation to all the elements present in the questionnaire, namely hiking, trekking, biking, mountain biking, horse riding, wildlife watching, fishing, rural tourism, caving and cross-country skiing.

### ***Problems related to Ecotourism***

According to Ms Stonawská the bigger problems regarding ecotourism are meeting the conditions of certification schemes, given that it does exist some extent of inconsistency between the large number of certifications that exist at international level. Strict criteria reduce the possibility of extending certifications. There are currently a number of certifications with different criteria, which is confusing for both service providers and consumers. Secondly, the low awareness of certifications might limit the expansion of ecotourism. The exclusivity of certified organisations often prevents the expansion of demand for facilities. Indeed, a small number of certified facilities contributes to low awareness of certifications. At the same time, it will take a long time to change people's attitudes to prefer sustainable forms of tourism. Due to the small number of certified organizations and the limited interest in these products, campaigns focused purely on these products are less effective (small target group).

Other problems are connected to accommodation, when it comes to the interest in getting certified, and the affordability of certified facilities. The availability of local transports can also be a problem, especially the connection of tourists to the main attractions by public transports and the connection of individuals to the transport services. Also, the range of complementary services offered might constitute a problem with regard to the quality and number of the services provided. Promotion should be also improved, tourists often choose destinations according to the most famous places. Increasing the visibility of lesser-known places in spite of promoting just the most visited

sites might help in grasping the attention of visitors. However, the small number of certified facilities makes it difficult to effectively promote sustainable forms of tourism. Quality of personnel also represents another problem. Prior to the outbreak of the pandemic, there was a shortage of skilled workers in tourism, with frequent fluctuations. At the same time, the relatively low demand for certified equipment makes it difficult to retain quality employees.

Regarding future projects envisaged for the short term, the Ministry itself does not realise any project. However, even though implementation of projects is not competence of MRD CZ, but of regional services providers and local tourism entities, the ministry will continue to support the creation of conditions for the development of sustainable forms of tourism.

### ***Training***

Ms Stonawská agreed that raining could be helpful in overcoming the problems connected to an efficient implementation of ecotourism products. In her opinion, raising awareness of certifications and their benefits for tourism service providers might help in overcoming the low interest in getting a certification, at the same time it might expand visitors' interest in certified products, the usage of sustainable forms of tourism, and in a responsible travel behaviour. Moreover, training could contribute to the education of entities engaged in tourism management in the destination, allowing for the creation of tourism products and marketing. Training could be useful also in expanding the recourse to certifications and in raising awareness of sustainable forms of tourism, nonetheless the interviewed did not express herself about online training

Regarding training offered within the institution, Ms Stonawská affirmed that the issue is not improving the education the staff of the ministry on the matter, but rather involving who really forge activities in the field of ecotourism and its development. Or consumers, to start making more use of sustainable tourism products, respectively behave environmentally friendly on their travels.

## 2.2. Ecotourism in HUNGARY

### 2.2.1. Empirical studies

Tourism is really important in Hungary. According to the Hungarian Tourism Agency, Hungary drew a record number of foreign visitors in 2018. The number of tourism nights spent in commercial accommodations in 2018 went up by one million to close to 31 million compared with the previous year. Domestic tourism increased by 5 percent. The number of foreign tourists arriving from the United States, Romania and the Czech Republic, countries among the top ten countries of origin, increased dynamically. Arrivals from China increased by over 10 percent. Tourism and the catering industry accounted for over 10 percent of Hungary's GDP.

Hungary has a great potential in ecotourism as there is a wide range of natural heritage in the country but the meaning of ecotourism is not really clear in average people's knowledge.

We cannot say that Hungary now has a significant and measurable ecotourism as the frames of ecotourism are not clear and written down. In Hungary, a lot of development is needed in connection with the eco- and green tourism. Now there are ecotourism attractions but they do not have complex packages, products and thematic tours. The other problem is the lack of marketing and promotion activities, which are essential to create the ecotourism image of Hungary if we want measurable results.

There is no comprehensive legislation background which also a very important factor. The importance of the legal frame is already known, but the necessary steps are still only in preparation status. Without the legal frame, ecotourism cannot become measurable as we do not have the exact conditions/terms/facilities for ecotourism itself.

Moreover, we have the problem with the lack of knowledge - ecotourism is the kind of tourism where knowledge and some basic behavioural, ethical codex is essential. If we just "use" nature and visit the ecotourism attraction but do not have the knowledge of how to protect these areas and how not ruin them, then we cannot call it ecotourism, because it is not sustainable. It is important to improve education on ecotourism and sustainability. It has to start in kindergarten and it has to be a natural behaviour for everyone. Just like selective waste collection, which is becoming more and more important in the last years as a result of consistent care and environmental education.

Ecotourism is getting more and more important in Hungary, but we are at the beginning of the development. We have the national strategies, but they are quite general. There is no effective and efficient regulations from the government. It is really good that a lot of municipalities and NGOs have plans, activities in connection with ecotourism but without governmental support, they can not provide effective development. Every year a lot of ecotourism development projects are implemented but the complex development strategy with the legal background is still missing.

The conscious development of ecotourism started in the '90s in Hungary. It was the time of the foundation of the national parks, the first visitor centres and also the first nature trails. Unfortunately, Hungary is back behind the neighbouring countries in ecotourism development and existing products, services, packages.

Now the measurements and statistics are not possible because the only category for this is active tourism which includes a lot of segments next to ecotourism, like rural, bicycle, fishing, hunting, hiking, golf, camping, water sports and horse tourism among others.

To analyse the current situation we collect a SWAT analysis of the most relevant facts – based on National Ecotourism Development Strategy. The SWOT analysis includes and summarizes the most important parameters and information on Hungarian ecotourism.

<b>STRENGTH</b>	<b>WEAKNESS</b>
<ul style="list-style-type: none"> <li>• great variety of natural values – national parks, caves, landscape protection areas, nature reserves, Natura 2000 areas, waterfalls, visitor centres, nature trails, forest schools...etc.</li> <li>• plenty of fresh water - rich aquatic life</li> <li>• mosaic location of natural values</li> <li>• national geographic coverage of ecotourism sites</li> <li>• existence of additional services</li> </ul>	<ul style="list-style-type: none"> <li>• lack of professionals in ecotourism</li> <li>• lack of educational background for ecotourism</li> <li>• low level of environmental protection in the country</li> <li>• lack of promoting/educating the sustainable aspect</li> <li>• low lobbying power</li> <li>• lack of ecotourism country image</li> <li>• uncertainty of the legal background</li> <li>• lack of a visitor-friendly approach</li> </ul>

<ul style="list-style-type: none"> <li>• NGOs are active and efficient in nature conservation, environment protection, sustainability and also in the development of ecotourism</li> <li>• high number of projects, programs, funds with the aim of ecological development</li> <li>• government support of ecotourism developments</li> <li>• joint presence of natural and cultural attractions</li> <li>• relatively low prices compared to international tourism</li> <li>• positive attitude of municipalities for ecotourism development</li> </ul>	<ul style="list-style-type: none"> <li>• lack of ecotourism products, packages, thematic packages, thematic tours</li> <li>• territorial inequalities</li> <li>• lack of cooperation between adequate ecotourism providers</li> <li>• lack of educated and language speaking workers</li> <li>• not effective education of environmentally conscious perspective</li> <li>• low level of ecotourism marketing/ promotion both national and international level</li> <li>• environmental awareness is far behind Western European level</li> <li>• infrastructural underdevelopment</li> </ul>
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<p><b>ADVANTAGES</b></p> <ul style="list-style-type: none"> <li>• active, committed, willing to do civil organizations</li> <li>• using the advantages/potential of the great variety of natural areas, sites, attractions, environmental resources</li> <li>• cross border cooperation for protecting and promoting ecotourism areas</li> <li>• development of organic and eco-farming companies/industries</li> <li>• creation of complex ecotourism packages with the specialties of</li> </ul>	<p><b>THREATS</b></p> <ul style="list-style-type: none"> <li>• only using the green areas but not protecting them – sustainability of ecotourism attraction is an essential task – avoid littering</li> <li>• harmful industrial effects - investments, constructions</li> <li>• pollution of water – international cooperation and laws are very important because rivers and lakes are crossing borders</li> <li>• extreme sports are popular in protected areas</li> </ul>
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<p>the regions (aquatic, health, eco, active, fishing tourism)</p> <ul style="list-style-type: none"> <li>• creation of thematic programs, packages and tours</li> <li>• development of additional tourism elements, services - supply expansion, quality development</li> <li>• infrastructure development of family and child-friendly services</li> <li>• national and international cooperation – implement good practices</li> <li>• increase in solvent demand</li> <li>• target group-oriented marketing and promotion</li> <li>• strengthening of the education of environmentally conscious attitude</li> <li>• development of the ecotourism image of the country</li> </ul>	<ul style="list-style-type: none"> <li>• lack of the required qualitative and quantitative development</li> <li>• attractions are not becoming into products</li> <li>• strengthening the competition on international level</li> <li>• lack of the necessary regional cooperation</li> <li>• lack of accommodation development</li> <li>• lack of compliance</li> <li>• mass tourism</li> <li>• lack of complex regulation of ecotourism, environmental protection and sustainability</li> <li>• lack of capital for developments and to protection</li> <li>• the unpredictability of socio-economic changes</li> <li>• lack of law-abiding behavior</li> </ul>
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Based on the presentation of the Director for Active and Cultural Tourism which was held on Hungarian National Parks Week on 25.05.2018. ecotourism and active tourism will be a very important segment in the National Tourism Development Strategy 2030. A lot of national funds will be aimed at the development of ecotourism sites. These developments will focus on the following priorities: complex development of the national parks, world heritage sites, integrated product and service development, active tourism networks, development of thematic networks, infrastructure development, sustainable (social and environmental) tourism development.

### **2.2.2. Offers**

In Hungary there are a lot of type of accommodation – like: hotels, pensions, campings, private accommodation. As there is not a comprehensive legal background of

ecotourism so it is really difficult to find accommodation that we can call eco-friendly. When someone wants to find an accommodation in ecotourism areas they can face with the following difficulties/questions - can the accommodation call itself eco-friendly if:

- they put a sign in the bathroom of environmental protection and the negative effects of the daily linen/towel change;
- if a hotel chain uses eco-friendly products (chemicals, washing powder, soaps, shampoos);
- if they are small and situated in a forest but having a hot tub in every room with a lot of unnecessary water and energy consumption;
- their waste collection is not selective;
- they do not take care of the food waste, just throw it into the garbage;

....and we can continue the list.

Now we can say that there are a lot of accommodation in Hungary which are open to change and trying to be more eco-friendly, sustainable and green.

In Hungary, there are eco-friendly products, but it is hard to find complex ecotourism packages. It is expected that the supply will change a lot in the next years and in some years there could be good examples of ecotourism packages and accommodation all over the country.

If we are talking about ecotourism offers in Hungary, we have to highlight the unique ecotourism destinations. Most of these sights have not just national but also international reputation and a lot of people come and visit these attractions year-by-year.

### ***Lake Cave in Tapolca***

The Lake Cave of Tapolca was discovered in 1903. The Lake Cave is the second of those barely two dozens of Hungarian caves that were declared protected already in 1942, before the introduction of the over-all protection of caves. It has been strictly protected since 1982; its highly protected status is justified by its geological, genetic, geomorphic, hydrological and biological values and its extent.



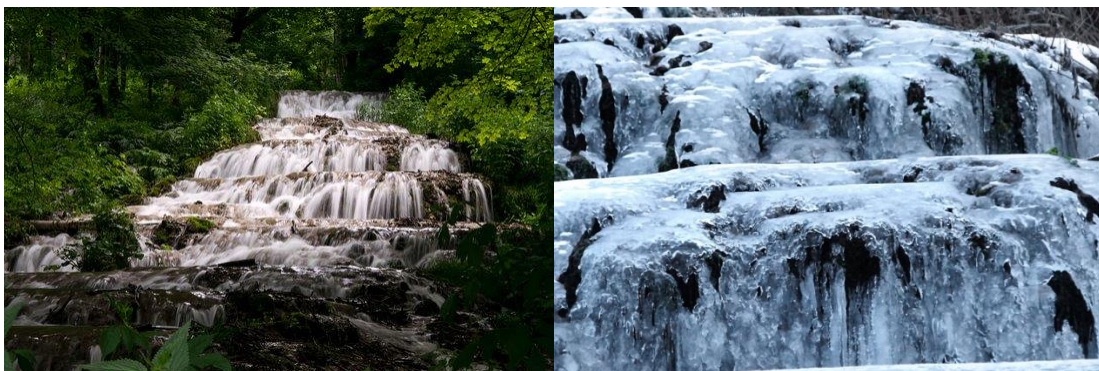
### ***Tisza Lake Ecocentre***

The main attraction of the Lake Tisza Ecocentre building is the largest freshwater aquarium system in Europe with a total capacity of nearly 1 million litres: its spectacular design together with underwater wonders offer a unique nature experience.



### ***Fátyol waterfall at Szalajka Walley***

Fátyol vízesés which is actually one big range of tiny cascades in a row is located southeast of Szilvásvárad at the west entrance of Bükki National Park. From Szilvásvárad a small road runs south following the river Szalajka. Hungary does not have a lot of waterfalls, but this one is spectacular both summer and wintertime.





### ***Lake Hévíz***

Lake Hévíz is a unique attraction in Hungary as it is the world's largest biologically active natural thermal lake. The source of the 4.4 ha water surface lake, rich in sulphur, and minerals can be found 38 metres deep in the cave, which due to its high well capacity completely changes in every 72 hours.

The Lake is very popular with locals and also a lot of tourist come and visit the region every year to cure themselves in the water which provides, on one hand, a unique experiment and on the other hand healing effect.

The lake of Hévíz is situated next to the famous lake Balaton (Hungarian sea) so the area is also preferred by local tourism.

Lake Echo of New Zealand is larger and its water is warmer, but it cannot be compared to the particularities of the Hungarian lake as it is not suitable for bathing and cannot be used for medical purposes.



### ***Nature Reserve of Ipolytarnóc Fossils***

Not only is it a world-famous, special Palaeontological Site with a European Diploma, but it is also an “ancient Pompeii” because of their prehistoric fossils that it can be viewed thanks to a volcanic catastrophe that occurred 20 million years ago; which make it become a real Jurassic Park and the most popular attraction at the Novohrad-Nógrád Geopark.



### ***Salt Hill Egerszalók***

There is a the small village of Egerszalók in the Northern Hungary, which has big appeal for visitors who enjoy relaxing in hot thermal waters while admiring an ever-changing geological wonder: the Sódomb (“Salt Hill”), a continually growing rock formation borne of a mineral-rich spring originating deep underground.



### **Analyse types**

Hungary has a great potential in ecotourism since there is great variety of natural sites all over the country. The most important ones are national parks, caves, landscape protection areas, nature reserves, Natura 2000 areas, waterfalls, visitor centres, nature trails, forest schools, protected areas, arboretums. More than the 10% territory of Hungary belongs to protected areas and 21% of the country is named as Natura 2000 area.

There are 750 ecotourism institutions in Hungary. More than the 50% of them, exactly 349 is partly or fully maintained by a national park directorate.

To have a bigger picture of the Hungarian ecotourism, it is important to see the numbers of the protected areas, as well as the extent and the volume of ecotourism territories.

### ***European Diploma of Protected Areas***

So far 3 Hungarian landscapes have been awarded:

- Szénás Hills Protected Area, the only habitat of the Pilis flax (*Linum dolomiticum*)
- Tihany Peninsula with its surface formations of volcanic origin
- Ipolytarnóc Fossils

### ***Ramsar Sites***

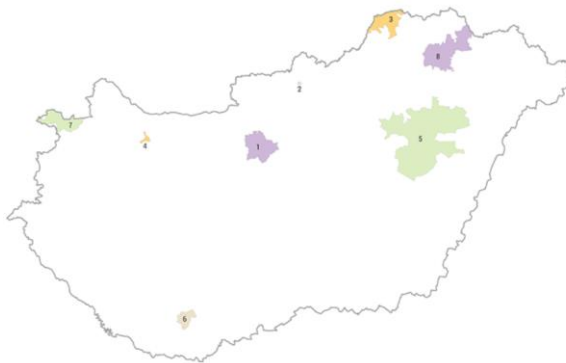
The purpose of the Ramsar Convention is the preservation and sustainable, wise utilization of wetlands of international importance. Currently there are 29 Ramsar Sites in Hungary.

### ***World Heritage Sites***

In Hungary there are 8 World Heritage Sites, out of which half of the sites are connected to ecotourism, and they are very important attraction as they have international recognition.

- Cave-world of the Aggtelek and Slovak karst – category of natural heritage;
- Hortobágy Puszta – category of cultural landscapes;
- Fertő Landscape – category of cultural landscapes;
- Historic Wine Region of Tokaj – category of cultural landscapes.

*Location of the World Heritage Sites in Hungary*



Source: [http://www.ksh.hu/tersegi\\_informaciok\\_egyb\\_statiztikai\\_celu\\_teruletegysegek](http://www.ksh.hu/tersegi_informaciok_egyb_statiztikai_celu_teruletegysegek)

### ***Biosphere Reserves***

Biosphere Reserves were created to protect the exceptionally valuable areas representing the Earth's significant ecosystems and to observe their ongoing natural and human-driven processes. Currently there are 6 biosphere reserves in Hungary:

- Aggtelek
- Lake Fertő
- Hortobágy
- Kiskunság
- Pilis
- Mura-Dráva-Duna

### ***European Destinations of Excellence***

Within the framework of a program targeting the display of the diversity and richness of European touristic destinations, regions within European Union Member States participate in an annual, theme-based tender to obtain the title "European Destination of Excellence" (EDEN), awarded every year to one region in each country.

EDEN awarded destinations in Hungary are:

- Best emerging rural destination of Hungary (2007) – Órség
- Best Hungarian destination preserving living traditions (2008) – Hortobágy
- Outstanding ecotourism destination of Hungary (2009) – Írottkő Nature Park
- Most promising natural aquatic destination of Hungary (2010) – Lake Tisza
- Traditional values with new functions (2011) – Mecsek area: Pécsvárad, Pécs, Orfű
- Best Hungarian accessible destination (2013) – Kaposvár and the Zselic area
- Best and tastiest destination (2015) – Mecseki Zöldút

### ***Geoparks***

The geoscientific heritage of our geoparks is beyond rich. Usually local communities are involved in the preservation efforts and the introduction of these heritage elements. These geoscientific treasures – along with cultural heritage elements – provide attractive geotouristical programmes. Currently, the UNESCO-supported Global Geoparks Network has 147 members, while the European Geoparks Network has 75 members. In Hungary there are 2 geoparks:

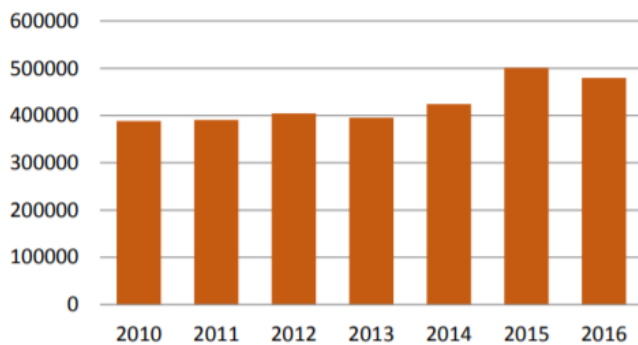
- Bakony–Balaton

- Novohrad-Nógrád

### **Caves**

There are more than 4,000 caves registered in Hungary. Most of these can be found in the karst regions of Hungary. There are approximately 30 caves open for the public tourists who can participate in a variety of programs from easy walking tours to real caving adventures.

It is interesting that in Hungary there are caves located in the capital city as well, not just in country sides regions. Pál-Völgyi Cave and Szemlő-hegyi caves are situated in Budapest and both of them are popular by locals and also by tourists. To the ones who likes adventures, Mátyáshegy Cave is highly recommended as it is left in its natural state. It is not as beautiful as the other 2 caves mentioned before, but they are providing real caving adventures for smaller groups. Caving equipment (overalls, helmet and light) is provided. It is a really unique ecotourism program offer in Budapest.



Yearly registered visitors of caves in Hungary between 2010 and 2016<sup>57</sup>

### **Caves of Aggtelek Karst and Slovak Karst**

Aggtelek caves are the most beautiful ones in Hungary. It is a large number of complexes, diverse and relatively intact caves concentrated into a relatively small area. Located at the north-eastern border of Hungary and the south-eastern border of Slovakia, this exceptional group of 712 caves, recorded at the time of inscription, lies under a

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<sup>57</sup>Source:

[http://www.termeszetvedelem.hu/user/browser/File/Okoturizmus/MNPH\\_2018/AM.pdf](http://www.termeszetvedelem.hu/user/browser/File/Okoturizmus/MNPH_2018/AM.pdf)

protected area of 56,651 ha and a larger buffer zone. Today more than 1000 caves are known in the area.

The Aggtelek Karst region is one of the most important cave regions in Europe, where caverns of various forms and origins, decorated with thousands of formations, having a unique flora and fauna and archaeological monuments are hidden beneath the surface. Due to this unique diversity, the underground world of the Aggtelek Karst and its geographically linked Slovak karst counterpart was listed as a UNESCO World Heritage site in 1995.

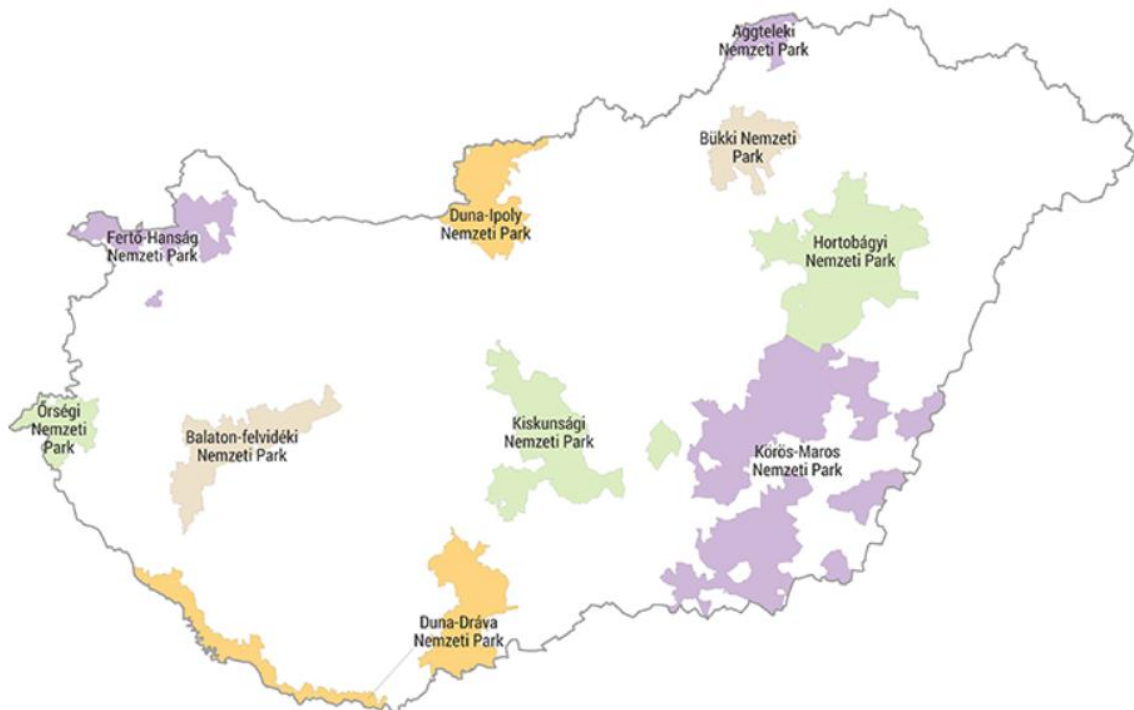


### ***National Parks***

There are 10 National Park in Hungary. The location of the national parks is not centralized - fortunately, they are fortunately all over the country. National Parks have a very important role in Hungary as they manage and maintain more than the 50% of the ecotourism institutions which means nearly 300 institutions.

Due to an important decision of the cooperation made in the last years, so as a result the 10 national parks have one centralized website and Facebook page, trying to promote ecotourism, environmental protection, awareness and sustainability together. It is a very important step, as together they have much more power and much more effect on national and international promotion/marketing activity.

*Location of the National Parks in Hungary<sup>58</sup>*



***Aggtelek National Park – A world of fascinating dripstone caves and hucul horses***

The most important site of the park is Aggtelek caves. Another interesting fact from the park, that the biggest Hungarian stud of hucul horses, the ponies of the Carpathian Basin, roams freely within the area of the national park all year round.

***Balaton Uplands National Park – A natural experience at Lake Balaton***

The region of Lake Balaton is one of the most beautiful Hungarian landscapes. Its beauty is supplemented by the spectacular remains of volcanoes that once ruled the area, the attentively cultivated vineyards climbing along hillsides and, of course, by the unforgettable panorama of Lake Balaton, with its surface of constantly changing colours. A few minutes away from the summer buzz of the lakeside, visitors may find a special

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<sup>58</sup>Source: [http://www.ksh.hu/tersegi\\_informaciok\\_egyeb\\_statiztikai\\_celu\\_teruletegysegek](http://www.ksh.hu/tersegi_informaciok_egyeb_statiztikai_celu_teruletegysegek)

place promising a diverse and exciting experience with its rich wildlife, well-guarded values and cultural offerings.

### ***Bükk National Park – Magnificent cliffs over beechwoods***

The Hungarian national park at the highest altitude is made diverse by hillsides covered by almost endless beechwoods, series of cliffs offering a magnificent view and colourful, flowery meadows of the Bükk Plateau. The unforgettable experience is guaranteed not just by the romantic Lillafüred and the picturesque Szalajka Valley, but also by caves, walking, cycling paths and countless nature trails.

### ***Duna–Dráva National Park – An experience of the wilderness along animate rivers***

The big rivers of South Transdanubia – Danube and Dráva – have been tireless in forming the surrounding landscape for thousands of years. Some areas close to the water are still covered by the ancient wilderness. The floodplain forests and marshy meadows along the rivers are populated by exceptionally diverse wildlife with multiple rare plants and animal species. This area is calmer than other national parks, making it a first-class target for still observations and adventurous water, cycling and walking tours.

### ***Duna–Ipoly National Park – The national park of the Danube Bend***

This beautiful and long-time popular area of Hungary is where the mementos of medieval Hungarian kings' dynasties are located. This is where the buzzing life of the capital meets the quiet stillness of the forest-covered mountains. The variety of landscapes, cultural and natural values provides enriched recreational activities for a wide range of visitors.

### ***Fertő–Hanság National Park – Adventures in the empire of wild geese***

Lake Fertő is like a water world lost in a mass of reeds, enclosed by a ring of villages with stork nests. Although the magic of the scenery is already perceptible this way, real experiences await those who go canoeing to experience a labyrinth of reeds, taking a closer look at the millions of winged inhabitants of the Lake.

### ***Hortobágy National Park – Hungarian World Heritage, the Puszta***

Puszta is a characteristic component of the Hungarian image. Although the traditional steppe-type lifestyle linked with livestock is keeping is already history in part, the particular “wildlife” of the Great Plain is fortunately not. The park, including the alkaline deserts and pasture lands of Hortobágy and Nagyunság, as well as some parts of the



water world of Lake Tisza offers much more than the mirage-haunted “Puszta Romance”: it offers an insight into the rich wildlife and traditional lifestyle of a region which is a real “Hungaricum”

### ***Kiskunság National Park – The landscape of magical dunes***

In the centre of Hungary, at the Kiskunság there are sand ridges which have been built by the wind in ancient times. Besides them, the values of several other special landscapes and habitats are preserved by the national park, including floodplain forests, washed grasslands, saline lakes and steppes along River Tisza. The term “Puszta” means much more than a peculiar habitat, it also includes the last memories of the culture mostly vanished by today.

### ***Körös–Maros National Park – A landscape of plains and rivers***

According to a water regulation of the 19th century, the world of waters was mostly forced behind the flood plains of rivers protected by dams. These special patches of “wilderness” – located along and nearby rivers – are taken care of by the national park, providing conditions for several rare animal and plant species to subsist.

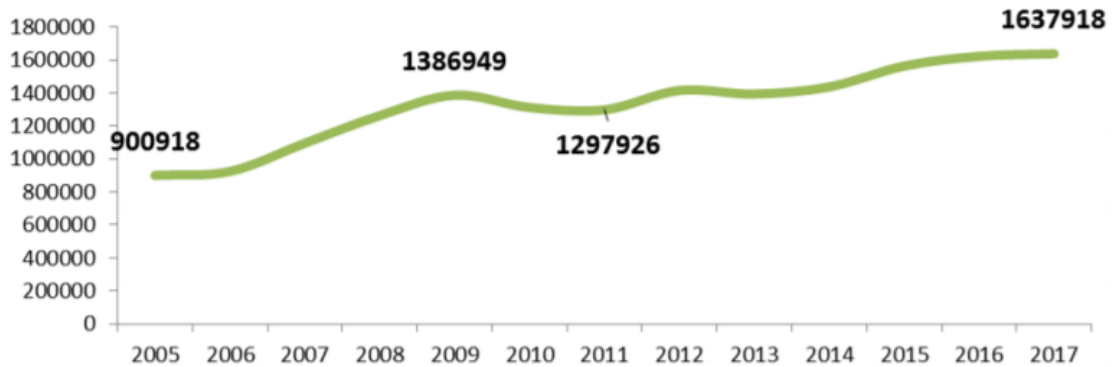
### ***Órség National Park – Natural landscape harmony***

Órség is a place in Hungary where man has been living in harmony with nature for centuries. Therefore, one of the main treasures of the national park is the cultural landscape itself, with the characteristic open structure settlement type and nature-conscious farming methods. National park treasures also include wetland habitats along the River Rába and forest wildlife.

### ***Traditional Hungarian products from the National Parks***

Many of the national parks visitors are interested in region-related unique products, specialties, local producers and craftsmen. The National Park Product trademark guarantees that customers and visitors obtain a product made in a protected area or in a Natura 2000 area, primarily using local ingredients, according to local traditions and conservation guidelines.

*Yearly registered visitors in the Hungarian national parks between 2005 and 2017*



Source: [http://www.termesztvedelem.hu/\\_user/browser/File/Okoturizmus/MNPH\\_2018/AM.pdf](http://www.termesztvedelem.hu/_user/browser/File/Okoturizmus/MNPH_2018/AM.pdf)

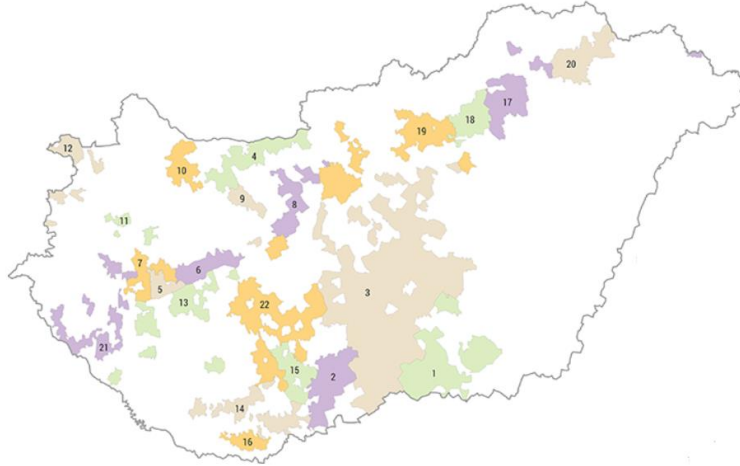
### ***Wine regions***

Wine regions are very important areas of Hungary. As they are connected to ecotourism and as there are more and more eco-friendly wine brands/products they have to mention when we are talking of ecotourism.

The creation of eco-friendly wineries is a new tendency in Hungary. The process of itself to becoming eco-friendly and to avoiding chemicals during both farming and producing it is a really slow process, consisting multiple steps. The first step is to change everything in the farming activity hence, it takes time to have the first harvest of the grapes without the chemicals and with eco-friendly farming, and the last step - after several small ones - is to create the eco-wine and finally have the product.

In Hungary, there are 22 wine regions and some of them have a quite extended international reputation.

*Location of the Wine regions in Hungary*

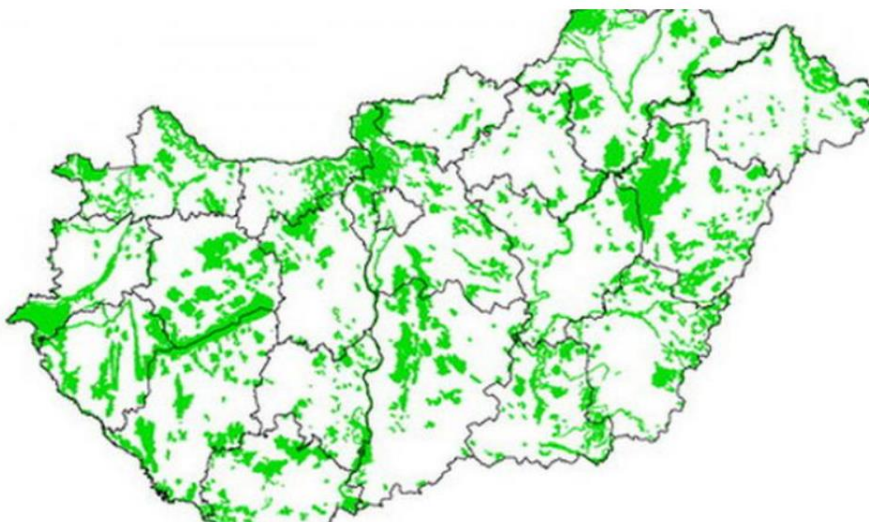


Source: [http://www.ksh.hu/tersegi\\_informaciok\\_egyeb\\_statiztikai\\_celu\\_teruletegysegek](http://www.ksh.hu/tersegi_informaciok_egyeb_statiztikai_celu_teruletegysegek)

**Natura 2000 areas**

Natura 2000 is a network of core breeding and resting sites for rare and threatened species and some rare natural habitat types which are protected in their own right. In Hungary the 21% of the country is dedicated as Natura 2000 area.

*Location of the Wine regions in Hungary*



Source: <https://natura.2000.hu/hu/natura-2000-fogalomtar>

### 2.2.3. Best practices

#### ***Cross border cooperation***

Lakes, national parks and nature reserves are crossing the borders in a lot of cases so the cooperation between nations is essential to reserve these kinds of natural heritage. Cooperation is important to protect these areas and further on, it is also important to promote and develop them together.

In Hungary, we have some border crossing cooperation, giving perfect examples of good practices.

#### ***Caves of Aggtelek Karst and Slovak Karst***

More than 99% of the Caves of Aggtelek Karst and Slovak Karst are well protected and preserved in their original natural condition and is well protected. The other 1% has been substantially modified as “show-caves” to allow human use, which includes 300,000 visitors annually. All of the caves are State-owned and the land above them has protected status. The cave system is exceptionally sensitive to environmental changes, including agricultural pollution, deforestation and soil erosion.

#### ***Ecotourism Institution Award***

In Hungary, there is an award for Ecotourism Institutions. The competition started in 2010 and from that time every year anybody can apply to the tender. The tender is published yearly by the ministry for the environment and tourism.

As the winners are outstanding sites/attractions so we have to mention them when we are talking of best practices. There are 2 categories every year: best visitor centre of the year and best nature trails of the year.

List of the winners per year:

- 2      2010. Visitor Centre  
Bechtold István nature protection visitor center, Kőszeg (Őrség National Park Directorate)
- 3      2010. Nature Trail  
Katalinpusztai Nature Trail, Vác-Katalinpuszta (Ipoly Erdő Zrt.)
- 4      2011. Visitor Centre  
Levendula House Visitor Centre, Tihany (Balaton Uplands National Park Directorate)

- 5      2011. Nature Trail  
Tiszavirág floodplain walkway and educational trail, Tiszafüred-Tiszaörvény (Szabics Bt.)
- 6      2012. Visitor Centre SHARED  
Pannon Observatory, Bakonybél (Balaton Uplands National Park Directorate)  
Katalinpusztai Excursion Center and Forest School, Vác-Katalinpuszta (Ipoly Erdő Zrt.)
- 7      2012. Nature Trail  
Nyírjesi Botanical Garden and Safari Park, Balassagyarmat (Ipoly Erdő Zrt.)
- 8      2013. Visitor Centre  
Ligneum Visitor Centre, Sopron (West-Hungary University)
- 9      2013. Nature Trail  
Pele-trail educational path, Csopak (Balaton Uplands National Park Directorate)
- 10     2014. Visitor Centre  
FUTURA Interactive Science Experience Center, Mosonmagyaróvár (Flesch Károly Nonprofit Kft.)
- 11     2014. Nature Trail SHARED  
Life is in the orchard educational path, Szalafő-Pityerszer (Őrség National Park Directorate)  
Molnárka Nature Trail, Gemenc (Gemenc Zrt.)
- 12     2015. Visitor Centre  
Ős-Dráva Visitor Centre, Szaporca (Duna–Dráva National Park Directorate)
- 13     2015. Nature Trail  
Csiga-excursion educational path, Zalakaros (Zalaerdő Zrt.)
- 14     2016. Visitor Centre SHARED  
Tapolcai Lake Cave Visitor Centre (Balaton Uplands National Park Directorate)  
Pörböly Ecotourism Centre (Gemenc Zrt.)
- 15     2016. Nature Trail  
Treasure hunt trail – Aggtelek (Aggteleki National Park Directorate)
- 16     2017. Visitor Centre  
Károly-magaslati Ecotourism Centre, Sopron
- 17     2017. Nature Trail  
Folly arboretum, Badacsonyörs

As mentioned before, the ecotourism in Hungary needs a lot of improvement and development, but these sites are on a right track to represent the country for local and international interested bodies.

## 2.2.4. Legal framework

Tourism in Hungary is coordinated by the state. Currently, the Ministry of National Economy is responsible for the management of tourism through the state secretary for tourism. However, the legislation about tourism has just changed about tourism in 2016 (1156/2016 (III.31) with governmental resolution introducing some major changes in the legislation and institutional system of tourism. Based on this new resolution, the tourism will be coordinated by the Ministry of National Development through an be appointed governmental commissioner. In addition to the existing Magyar Turizmus Zrt. (Hungarian Tourism Shareholding Company), the regulation established the Magyar Turisztikai Ügynökség (Hungarian Tourism Agency), as a state-owned agency to coordinate the touristic events, to carry out product-developing activities etc. The legislation of tourism is therefore the task of the relevant ministry and background state-owned institutions. The legislation covers the whole country. Due to its interdisciplinary feature, tourism cannot be regulated in one act, there are several related topics regulated separately (act about certified brands, about travels of foreign visitors, about historical and cultural heritages etc.).

There is no difference between the legislation for tourism and non-tourism companies regarding their establishment. General rules apply to the tourism companies. However, it can be stated that the tourism is mainly dominated by SMEs. 80% of the more than 27,000 tourism companies deal with catering, 7% is specialized in tour organizing and 13% deals with accommodation services. The most frequent form of business is the sole proprietorship. Those with a have high number of employees, are basically hotels.

There is a compulsory collective agreement for all the employees in the tourism and catering sector. It was signed in 1997 and was extended to the tourism sector in 2001 by the Minister of Economy. It provides a higher minimum wage (min. 10% higher than the national average) for all the employees in tourism and catering and regulates the extra work and overwork. The maximum overwork per year is 300 hours. Maximum 4 hours overwork can be ordered per day, or 8 hours on 2 consecutive days. The extraordinary work should be announced minimum 3 days in advance.

As for the special taxes in tourism, there is the tourism tax which is defined by the local government. Its amount varies from settlements to settlements. It can be a fixed amount or a certain % of the price of the accommodation. E.g. in Budapest, it is 4% of the accommodation fee, while in other cities it is about 450 HUF/night/person over 18

years of age. The tax should be paid to the host and he/she pays it to the local government each month.

**Eco- and green tourism:** As in the current situation there is no special category of ecotourism, it is really difficult to find the frames, legal background and the legislation of it. The category including ecotourism is active tourism consisting of a lot of segments as well - like rural, bicycle, fishing, hunting, hiking, golf, camping, water sports and horse tourism. Green tourism is not addressed in any legislation in Hungary yet. It is a totally missing field in legislation.

There is only some legislation background for protected areas and environmental protection.

There is a governmental resolution No. 1165/2012. (V. 22.) which is about the protected natural areas but there is no concrete regulation for tourism from the environmental point of view.

The revised list of topographical numbers of the Natura 2000 network was published on 11 May 2010 by the Minister of Environment and Water in the 14/2010 (V. 11.) decree of the Ministry of Environment and Water. The regulation names Natura 2000 sites to which the rules are laid down in Government Decree 275/2004, in force since 17 October 2006.

In Hungary there are some **Certification Marks** in connection to **ecotourism**:

- 18 Rural tourism – 1-4 sunflowers
- 19 Camping – 1-5 star
- 20 Paddle water stops – 1-4 paddles
- 21 Horse services – 1-4 horseshoes
- 22 Forest schools – woodpecker and forestry labelling
- 23 National park products trademark

1992 roadbed law played a key role in the development of infrastructure related to ecotourism because it prescribed the percentage of the road fund to be used for the construction of cycle paths.

*Natural areas protected by a specific law*

Categories of protection	Hectares	Sites
National Parks	480 697.9	10
Landscape protection areas	336 874.9	39
Nature conversation areas	32 453.3	172
Natural monuments	122.5	90
<b>Total</b>	<b>849 148.6</b>	<b>311</b>

Source: <http://www.termeszetvedelem.hu/protected-areas>



## 2.2.5. Results of interviews in Hungary

Organising of the interviews started in December 2020. EcoCenter used national database direct contacts and, as it has a connection to VIMOSZ – Hungarian Hospitality Employers Association, it involved them in the questionnaire process as their membership accounts for around 1500 tourism companies.

Finally, we had 5 people for the interviews. We tried to reach different people with different aspects, because this can help to have a wider look at ecotourism.

**2 National Parks** – In Hungary, we have 10 National Parks and 2 of them were happy to be interviewed in the frame of STEFAN project.

**1 Educational Institution** – Edutus University which has a popular tourism course in Hungary.

**2 Accommodation** - Both of the accommodations have a nature protection point of view and both are related to ecotourism.

### Summary of National Park questionnaires

Aggtelek National Park and Kiskungág National Park were involved in the interview session.

Kiskunság National Park - In the centre of Hungary, at the Kiskunság there are sand ridges which have been built by the wind from ancient times. Besides them, the values of several other special landscapes and habitats are preserved by the national park, including floodplain forests, washed grasslands, saline lakes and steppes along River Tisza. The term “Puszta” means much more than a peculiar habitat, it also includes the last memories of culture mostly vanished by today.

Aggtelek National Park – The most important site of the park which situated in the north-eastern part of Hungary are the Caves of Aggtelek and Slovak Karst. It is the first national park in the country which was primarily created for protecting geomorphological formations. Another interesting fact from the park is that the biggest Hungarian stud of hucul horses, the ponies of the Carpathian Basin, roams freely within the area of the national park all year round.

From the side of Aggtelek National Park Directorate our contact person was Zsolt Bacsó, a team leader from the Public Relations and Marketing Department of Ecotourism and Environmental Education.

From the side of Kiskunság National Park Endre Tóth an ecotourism rapporteur answered our questions.

Both of the National Parks have ecotourism products. In Aggtelek there are two very important ones - caving and horse riding, as the National Park has unique caves which are the part of the UNESCO heritage. However, they also have other products as well which are widespread in the whole country, like hiking or biking. The only category that Aggtelek mentioned as a non-ecotourism product of the list is fishing, as the lakes known by the interviewed are just used by locals and it does not have a tourism aspect.

Kiskunság National Park has several programs related to ecotourism, like nature trails, forest schools, horse riding, but they have special ones like orchid tourism, mushroom or herb tours. They also organize field practices, internships, nature conversation/nature study camps.

### ***Objectives related to ecotourism***

Aggtelek National Park:

- improvement of the tour reservation system – this is a short term goal for the next year and they are already in the implementation process, but because of the COVID-19 situation the implementation stopped as they do not have the possibility of making reservation for the tours, so they can continue the process after the restrictions will disappear;
- providing more program;
- expanding offers.

Kiskunság National Park:

- developing the quality of the places to the European standard;
- using environmental friendly solutions;
- creating and managing destinations based on attractions and services;
- more effective social involvement;
- expansion of the ecosystem services;
- increasing the mission and role of National Parks of the recreational and active activities;
- Stable predictable and sustainable operating conditions;

- Improving current conditions – presenting the area, visitor information.

Kiskunság National Park has several short term goals:

- construction of smaller buildings on Bugac, Szatymaz, Izsák and Böszörmény;
- habitat reconstructions – protecting ecology and improving visual value (Böddiszek);
- promotion of extensive forms of farming – grey cattle, racka sheep, buffalo – promotion of products and hungaricum provided in the National Park;
- development of extensive farming (Izsák, Kígyóshát);
- further development of National Park products – honey, jams, syrups...etc.

### ***Relation between the visitors and the National Park***

Aggtelek – They have special regulations and they have a strict limit of visitors on tours to protect the caves and the visitor groups

Kiskunság – Endre Tóth said that the relation between the National Parks and the visitors depends on several things like the attitude of the National Park directorate, financial issues and other subjective or objective things. In Kiskunság they also have a limit of the visitors to protect the area.

### ***Relation between companies/stakeholders and the National Park***

Aggtelek – Financial cooperation is not possible now, the only kind of cooperation exists in the field of marketing with tourism companies.

Kiskunság – The tourism potential of the area is growing, the nature tourism is seasonal and the attractions are significant locally/regionally/nationally. As a consequence, the relation with the companies or other profit oriented stakeholders is minimal. The National Park tries to help small local entrepreneurs, mostly they are mostly active in agriculture and the tourism sector. The National Park has a very good relation with the local municipalities. Ecotourism has a difficult situation in the area since it is not significant individually, tour operators are not interested in it. Currently, ecotourism and programs related to ecotourism are only profitable when packaged with other tourism products or services.

### ***Education***

Zsolt Bacsó thinks that the knowledge of the ecotourism professionals is good in Hungary, but there are a lot of segments which can profit from a complex ecotourism educational material. He mentions the service providers and also the visitors who can

be interested in an ecotourism course. He also mentions that there are some big problems in Hungary including the infrastructural difficulties and lack of financial possibilities.

Endre Tóth from Kiskunság said that a higher educational level can be better; for this reason, have a course after diploma could be the best. It would be useful for the interested people or even for volunteers who care about the environment and have an interest in continuous improvement of their knowledge. A course could be useful for several institutions – like arboretums, zoos, nature parks, National Parks, forestry...etc.

Both of the interviewees take part in online courses, as for them there are mandatory courses required by the state. There are available courses every year, and every civil servant can pick up courses in a credit system.

## **Summary of Educational institution questionnaire**

Currently, the University does not have a specification on ecotourism (used to) - now ecotourism is just a subject of the tourism course. We interviewed Dr. Pál Gubán, the professor of ecotourism. The main aim of the institution related to ecotourism is to educate the interested students, provide them with internship possibilities, thesis supervision, nature studies, field trips, possibilities to involve them in national or international projects, networking...etc. The university does not have a special budget for tourism/ecotourism, but they have some money to spend from Erasmus projects and from their own sources.

The institution unfortunately does not have actual goals related to ecotourism.

### ***Ecotourism products***

The biggest problem in Hungary is that the concept of ecotourism is not clear. In the country, the meaning and the practice of ecotourism are not the same as it is internationally. In Hungary, the meaning of “ecotourism” is more similar to the nature-based concept. Another big problem is that we do not have measurable researches on the national ecotourism demand. A lot of places call themselves a “eco” accommodation, but they cannot see that being an ecotourism accommodation means social-ecology-economic caring and not just selective waste collection or a sign in the bathroom (towel change).

We have potential – hiking, biking, horse riding could be a product, but the correctly assigned paths, visitor management and monitoring system are missing mostly in the

whole country. Rural tourism is important in Hungary but most of the places do not have an ecological point of view, so they are not a part of ecotourism.

The areas in the country which are the most suitable for ecotourism are the peripheries where anthropogenic effects are still minimally detectable – like Belső-Somogy, North-East-Hungary, some part of Zemplén and Kali Basin (Káli-medence).

### ***Main problems in the country related to ecotourism***

Some of the biggest problems are already mentioned, but further on

- not even the most important literature is available in Hungarian
- national literature is not based on international concepts and practice
- ecotourism is not clear – even in the education the universities - agriculture, tourism and geography – if you study these courses you will learn different aspects of ecotourism
- without the changes in training, education and courses, the international meaning of ecotourism is not possible

### ***Education***

The current knowledge of the professionals is extremely weak. It does not mean that there are no good professionals in Hungary, but because ecotourism does not have a clear meaning, does not fall under any national regulations and does not have a uniform/standardized educational background, the situation is really hard now. Development is necessary and it has to be based on the specificity of ecotourism such as long stays, peripheral hosting areas with low or not existing economic power.

A complex training would be really helpful for young, interested people already having basic knowledge, municipality workers, the population of periphery areas, entrepreneurs, etc. Dr. Pál Gubán also mentioned that the theoretical education only is not enough in this area, the nature study and study visits are essential.

He mentions that he had training on National Park management in Wales in 1996. The main motivation was that it was his interest area and he was really satisfied with the training as professionals were asked to hold presentations and there was a great emphasis on practical knowledge, so the most of the training was taking place “on-site” at Snowdonia, Lake District and Peak District National Parks.

## Summary of Accommodation questionnaires

Two accommodations were involved in the research. One of them is Crocus Gere Wine Hotel from Villány and the other is Erdőfi Major Guest House from Kölked-Erdőfű.

Erdőfi Major is an ecotourism accommodation, they are located in a National Park in Hungary, namely the Duna-Dráva National Park, and they have the eco-port certification<sup>59</sup>. They have an environmentally friendly and sustainable approach – they use renewable energy, they collect waste selectively, they have special wastewater management. Biodiversity maintenance is important for them, they have a kitchen garden and some (traditional Hungarian) animals that they use for small-scale food production.

Crocus Gere Wine Hotel has several activities/facilities, where environmental protection and sustainability are important facts, but as the operational structure is based on the classical tourism mechanisms, so they do not want to call themselves as an “eco” accommodation. They use geothermic heating and cooling, they have solar collectors and so on.

Ferenc Schmidt from Crocus Gere Wine Hotel said that, in his opinion, the Duna floodplain – around Kölked, Erdőfű is the best place for ecotourism in Hungary.

Both of the interviewed said that it is difficult to determine the ecotourism situation in Hungary from a market point of view. Ferenc does not have the knowledge to answer this question, and Krisztina from Erdőfi Major said that in Hungary there is no marketing, no future plans and no expectations in the field of ecotourism, there are only some good initiatives in some places in the country.

### ***Main problems in the country related to ecotourism***

Erdőfi Major – The main problem is that, in the Hungarian business culture, the cooperation is not the strongest link. Another problem is that in the whole country the that local transport is absolutely not visitor-friendly, the service providers are not flexible enough and there is a huge problem with the knowledge of the service providers.

Crocus Gere Wine Hotel – The ecotourism concept is missing, so it is not easy now. The most important factor is the improvement of the service providers’ knowledge and educational level, because it can make ecotourism a unique tourism product in Hungary.

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<sup>59</sup> eco-port certification is a kind of environmental friendly trademark in South-Dunantúl region.

Now, ecotourism in Hungary means much more different things than other places in the world so we need some improvement in the country.

### ***Objectives related to ecotourism***

Erdőfi Major – have a plan to create a small scale (10-10 people) children’s camp and bicycle accommodation in the next two years.

Crocus Gere Wine Hotel – unfortunately, they do not have any short term goals related to ecotourism.

### ***Education***

Crocus Gere Wine Hotel – improvement is needed, average people do not know what ecotourism really means. There are some professionals who have the knowledge, but further education is essential to a lot of people who are working in the industry. The standardized improvement of ecotourism is also necessary.

A complex ecotourism training can help a lot, it should contain: basic tourism training, ecotourism and good practices in the word, sustainability. It would be helpful not only for the entrepreneurs, but also for the service providers. Online training is good, but personal education/contact cannot replace with online forms.

Ferenc participated in an online course in 2020, while there were tourism courses available in the times of COVID.

Erdőfi Major – There are only a few people with a formal educational diploma. More commonly, people have self-acquired qualifications related to the topic. The most important thing in ecotourism is the approach which none of the training or marketing can replace.

Complex training can help - basic education on natural value, landscapes history, traditional activities, eco-conscious operation (energy, water, waste, etc) as well as raising awareness of environmental protection/ecology is important to the ones, who are just starting in the are. For the professionals who already have routine, new directions, good practices, innovative elements can be interesting and useful.

The most effective way to educate ecotourism is on-site training, with practical elements. Personal appearance and credibility are of great importance in ecotourism.

Krisztina also participated in an online course on local products in South-Hungary in 2011. It was interesting and useful to get in touch with local producers and entrepreneurs and discover the local product supply/repertoire.

## 2.3. Ecotourism in SPAIN

In Spain ecotourism has been increasing in the last years and different companies from different parts of the country have started to get interested in this alternative for a more sustainable tourism. In fact, Spain already has a great number of areas accredited by the European Card of Sustainable Tourism (CETS) which is supported by the European Commission.

The Official Web of Spanish Tourism shows an index of all the areas in Spain certified with CETS, counting 28 nowadays.



The CETS is an EUROPARC initiative started in 2001, which main objective is to promote the development of sustainable tourism in protected natural areas in Europe. Its method consists of a voluntary commitment to apply the

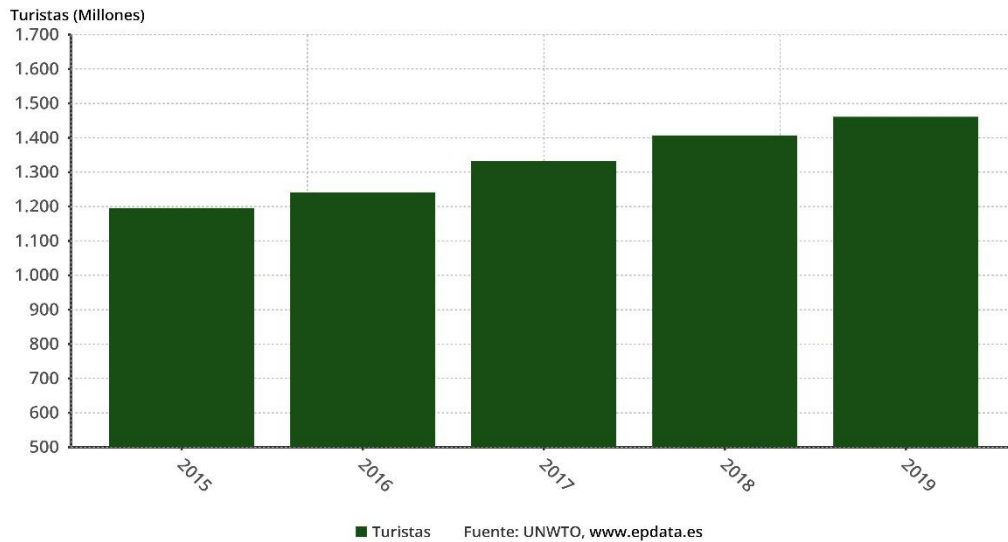
principles of sustainable tourism guiding the managers of protected natural areas and companies to define their strategies in a participatory manner.

CETS guide for companies in Spanish:  
<http://www.redeuroparc.org/system/files/shared/guiacets.pdf>

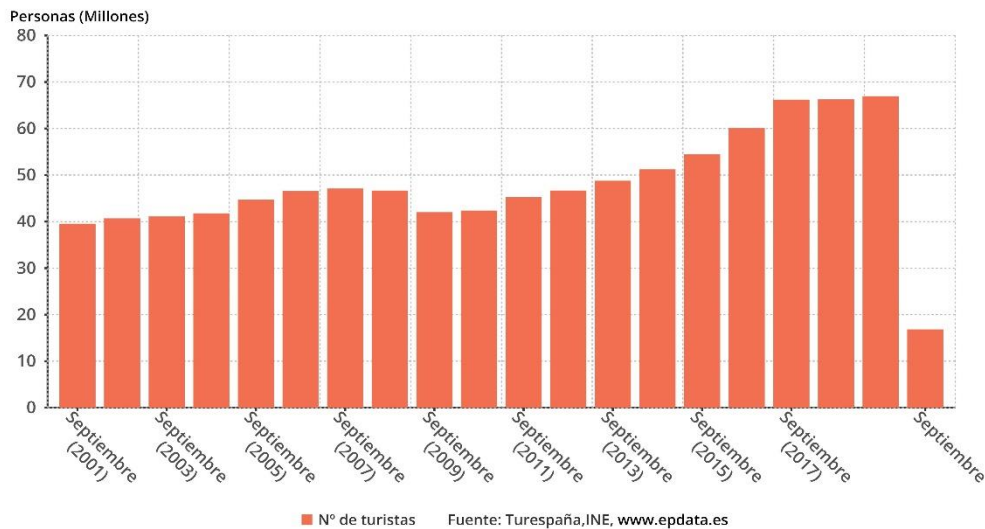
### 2.3.1. Domestic and international demand

According to the UNWTO (United Nations World Tourism Organisation) more than 1.400 million people traveled around the world in 2019.





Regarding Spain, specifically, international tourism in the country has been growing since 2001 up to now. Due to the COVID-19 crisis, tourism has declined dramatically in 2020 - not only in Spain, but all around the world.



Although Spain is famous among international tourists for its sun and beach holidays, it also offers many different alternatives which go together with the promotion of culture and sustainability.

Each region in Spain offers different landscapes and activities to enjoy and live a native experience. In Spain, domestic tourism is really used to enjoy rural cottages during a weekend vacations and, since 2014, this sector has increased up to 4,4 million tourists

in 2019. Among the users of these rural cottages, a great number of international tourists arises but domestic tourists still stand out.

### 2.3.2. Tourist destinations

In the last decades, the terms of “overtourism” and “tourismphobia” have appeared due to the unsustainable massive tourism practices in some cities all around the world and consequently, the environmental problem arose everywhere.

These precedents contributed to the urgent development of new strategies and plans to promote sustainable and slow tourism which has been increasing every year.

In Spain, many cities and regions have joined the alternative of slow travel and ecotourism. These concepts invite the traveler to forget the pre-established fees for the traditional tourism industry. In return, it offers the enjoyment of vacation destinations in a calmer, more conscious and sustainable way.

According to Expedia report on sustainable tourism in Spain (2019) these are the top spots regarding ecotourism:

- **Vitoria Gasteiz:** the city counts on the "Biosphere Responsible Tourism" emblem and it was also designed in 2012 as "European Green Capital".
- **Bilbao:** the city is immersed in an Action Plan for Tourism 2019-2025. During this period, more than 90 actions have been planned with the objective of strengthening the tourism sector from a sustained and sustainable point of view.
- **Córdoba:** this city was about to collapse due to its massive tourism but the local government decided to work hard in order to transform the city into a destination which follows the slow travel and ecotourism.
- **Menorca:** This Balearic destination has the declaration of a Biosphere Reserve.

In addition, it has joined the Ecotourism Association of Spain. Places such as the Biosphere Reserve and the Albufera des Grau Natural Park will benefit from actions related to zero waste and, of course, the development of initiatives based on ecotourism.

Furthermore, Spain (2020) has 15 spaces declared as Protected Natural Spaces which require a more sustainable tourism in order to conserve it biosphere:  
<https://www.miteco.gob.es/es/red-parques-nacionales/nuestros-parques/>



### 2.3.3. Key domestic actors

The Government of Spain, through the Secretary of State for Tourism, is preparing the Sustainable Tourism Strategy of Spain 2030, a national tourism agenda to face the challenges of the sector in the medium and long term, promoting the three pillars of the sustainability: socioeconomic, environmental and territorial. To this end, a participatory process has been promoted in which the whole sector and its the autonomous communities are being involved.

The objective of the new Strategy is to lay the foundations for the transformation of Spanish tourism towards a model of sustained and sustainable growth, which allows us to maintain its position in the world leadership. The new model will be based on the improvement of the competitive capacity and profitability of the industry, on the differential natural and cultural values of the destinations, and on the equitable distribution of the benefits and burdens of tourism.

Spanish Government plays a key role in ecotourism promotion by establishing different laws and measures for companies willing to join the sector. The most known and important ones are listed below:

❖ CENEAM

CENEAM is a reference center in environmental education that has been working since 1987 to promote the responsibility of citizens in relation to the environment. It is constituted as a resource center at the service and in support of all those groups, public and private, that develop environmental education programs and activities.

❖ CDTE

The CDTE (Center for Spanish Tourist documentation) is considered one of the most important tourism documentation centers in the world, both because of the number of documents it guards and for its quality.

❖ EUROPARC SPAIN

Since 1993, EUROPARC is the main professional forum for protected areas in Spain, where proposals for the improvement of natural spaces are discussed and elaborated. It actively participates in the EUROPARC Federation, a pan-European organization created in 1973 that brings together institutions from 39 countries dedicated to the management of protected areas and the defense of nature.

According to a study carried out by the Ostelea: School of Tourism and Hospitality: Travel agencies and tour operators have also joined the change and commitment to sustainability. The Responsible Tourism Institute Affiliate member of UNWTO and UNESCO also certifies tour operators, thus in Spain and specifically in Catalonia, only two tour operators have this certification: the Winestyle company Travel and Barcelona Guide Bureau (2017).

## 2.3.4. Offers

### *Offer overview*

The ecotourism and sustainable tourism offered in Spain is as heterogeneous as its climatic variety, its different landscapes, traditional tourist destinations, its gastronomy, or its culture. Let's not forget that it is a country with very different territories, with different cultures, different resources, different languages, different folklore, and of course, different landscapes.

Different cultural and climatological environments are naturally associated with different natural resources, and, therefore, different possibilities of the sustainable tourism offer.

For this reason, it can be said that the sustainable tourism offer in one of the most important countries in the tourism sector in the world, is highly varied and adapted to multiple environments, profiles of target people, contexts of realization, or typology:

- **Sustainable tourism or ecotourism associated with natural landscapes.** There are numerous areas of Spain with an important and varied offer in "green tourism", both inland and on the coast, both in rural areas and in cities linked to green tourist environments; both sea and mountain.
- **Sustainable tourism or gastronomic ecotourism.** In Spain there is an important subsector of gastronomic tourism linked to the different gastronomic traditions existing in different areas of Spain; as well as thriving and increasingly important wine tourism, associated with the variety, quantity and quality of wines that Spain regularly produces.
- **Sustainable tourism or recreational ecotourism:** associated with gaming experiences and sports, raised in natural areas and configured in a sustainable way.
- **Sustainable tourism or rural ecotourism:** In recent decades, the economic and social growth of Spain has implied what is usually called the "internal emptying", caused by a strong internal emigration from little towns to cities; leaving behind thousands of towns with few -minimal- population, or even empty and abandoned. After many years of ignoring this reality, currently, and more so now with the consequences and restrictions of confinement due to COVID, rural tourism -stays in small towns mainly in the interior- has reached such a strong boom that it is becoming an industry with its own entity.
- **Sustainable tourism or ecotourism associated with processes to make sustainable classic configurations of traditional tourism in Spain:** This type of tourism is born from applying sustainability concepts to traditional tourism, such as recycling, energy optimization, environmental impact, respect for the environment, or harmonization with the community.

These five main typologies define most of the sustainable tourism offer in Spain. However, each one of them has its own characteristics, and these characteristics are different in each area, depending on the existing natural resources, its own gastronomy and culture, or according to the development achieved by ecotourism in that environment.

Although there is a common legal framework and common agencies that promote tourism from the government, it should be noted that each autonomous community in

Spain has its own government and its own bodies and different instruments to promote or develop tourism and specifically also sustainable tourism.

This means that the heterogeneity of the sustainable tourism offer in Spain exceeds these five typologies, and ends up having its own consideration in each place, enriching the variety of the country's offer, but allowing its characteristics to vary continuously without a common model.

Even so, despite not being possible to speak of a common model, it is true that most of the sustainable tourism or ecotourism offer in Spain, even having different characteristics in each area, is usually associated with natural landscapes, or **rural** tourism; or both at the same time.

More than **78% of this offer** is mostly green and/or rural tourism, clearly influenced by being the country that occupies the first world position in Biosphere Reserves with 48 and the second in Geoparks, the first country in Europe in the projected natural territory and the third behind only the USA and Russia; as well as for the boost that the Government of Spain has given to tourism in these areas with the aim of revitalizing them.

The vast majority of these natural spaces are in rural areas are affected by the phenomenon of depopulation. In these areas, ecotourism represents an opportunity for socio-economic development, generating employment, helping to establish population and services, and diversifying the local economy; while guaranteeing the conservation of its biodiversity and the way of life of its inhabitants. (Ministry for the Ecological Transition and the Demographic Challenge of Spain, 2019).

### **2.3.5. Accommodations**

The type of accommodation characteristic of ecotourism destinations is a rural house or a mid-range hotel, which takes advantage of renovated buildings.

Rural houses for full rental or shared medium category (60%) of small size with a maximum capacity of 25 beds predominate. Most of them are rehabilitated buildings located in natural space. There are also large capacity establishments which, in some cases, offer more than 400 places in hotels, campsites or holiday centers in destinations with a large influx of people.

62% of the establishments offer complimentary catering services to the accommodation. Among the establishments that provide this service, 100% of them offer breakfast, and 75% offer dinner. Instead, only about half of them give meals. Small establishments predominate: accommodation with a capacity of up to 25 people represents 67.4% of the sample and those that do not exceed 12 places are the most frequent category.

In addition, almost 75% of these accommodation possibilities are located within a protected natural area.

From there, there are clear differences between establishments that exclusively offer accommodation and those of companies that combine accommodation and activities. These tend to be more basic accommodations, in which all the food services that the client needs are offered and which are mostly located outside an urban area and within the scope of a protected natural space. They are also larger capacity establishments, which are usually aimed at organized groups that come to the establishment to participate in the activities. These activities are very varied, from renting spaces to organizing cooking workshops, tastings, routes, meditation, sports, etc.

Both in the case of accommodation and activity companies, there is a strong temporality, with summer being the time that concentrates the busiest months, followed by spring, long weekends and holidays. Summer is the time of maximum occupancy for more than 77% of those surveyed, followed by Easter (61%) and long weekends and holidays (55%). Winter, from January to March, is a time of maximum occupancy for only 18% of the establishments.

The average price of the stay per person and night in high season is in the order of € 26 to € 49 in 50% of the accommodations. This price is reduced to € 16-25 in the mid-low season for 43% of the establishments, while it remains in the order € 26-49 for 33%.

Finally, it should be noted that also in this each area of Spain has very different accommodation possibilities, with different characteristics; including, for example, mountains mansions, coast mansions, country houses, or farm-workers dwellings, among others.

### **2.3.6. Tourist packages**

In Spain, there are numerous and very different tourist packages that arise from combining the following characteristics:

- Destination area or territory;
- Guided or independent tourism;
- Type of accommodation;
- Type of gastronomy and associated services.

In most cases, any combination of the above characteristics can be materialized in a standard or custom-designed package, among the following options:

- Sport in nature;
- Accessible ecotourism;
- Family ecotourism;
- Ecotourism to learn;
- Ecotourism and wellness;
- Getaways;
- Nature and animal / floral culture;
- Gastronomic and / or oenological ecotourism.

Most of these packages are entirely articulated around a territory and its possibilities and the activities are organized, free and voluntary, taking advantage of existing resources.

Additionally, there are also traditional tourism packages configured from a sustainable perspective or with respect for the environment, and that except for the application of these characteristics -with a real background, or as a mere marketing instrument- are not different from traditional packages.

Regarding its structure, we can easily check the following characteristics:

- Duration: These are usually short-stay packages, responding to the reality described by the Secretary of State for Tourism of the Government of Spain, where, in 2019, the average stay of tourists in these establishments was 3.22 nights; with 70% of ecotourists staying between 1 and 3 nights, and 95.4% between 1 and 7 nights.
- Accommodation place: according to the Ecotourism Observatory of Spain for 2019, more than half of the places offered for accommodation are in rural houses, both full rental and shared rental.

Who offers these tourist packages? According to a report presented by the Secretary of State for Tourism of the Government of Spain, in 2019, approximately 50% of ecotourists purchases a package through an activities company, while the remaining 50% usually



purchase individual services and form their own agenda according to the services and interests available in the area.

This shows us that the offer of sustainable tourism packages in Spain is very dispersed, with half of the market managed through numerous small companies, and another half configured by the client himself, nowadays mainly through the Internet.

It should be noted that precisely the possibility of setting up your own itinerary depends on the existing online resources and that companies or offers that do not have an adequate presence on the Internet may be left out of the current tourist circuits and flows in Spain. The profile of the public that wants to hire these packs is usually demanding, and they look for the best option by performing an on-line option analysis with high frequency.

Regarding this situation, numerous portals or travel agencies have emerged in Spain that have a section to search and contract a sustainable tourism or ecotourism package, many of them based on the concept of "experience".

However, it's striking that the purchasing of these packs, even when finding them on the internet, is carried out online only 30% of the time, while the other 70% is mostly done by phone or email.

To a large extent, this is caused both by the lack of adequate updated resources, as well as by the deep dispersion of the sector, and that existing heterogeneity from its own structure, where there are numerous sector associations but none predominates; and their different application contexts.

### **2.3.7. Types of eco-tourism products**

In the last decade, Spain has begun to speak more frequently of "ecotourism". A kind of tourism that aims to be a memorable experience where you can discover and get to know the most valuable natural enclaves, but in a responsible and committed way with the territory and its local communities. For this reason, ecotourism enables different groups of tourists to have direct and personalized contact with the natural resources and values of the territory; in addition to expanding and enriching the way of thinking, valuing and acting while we travel.



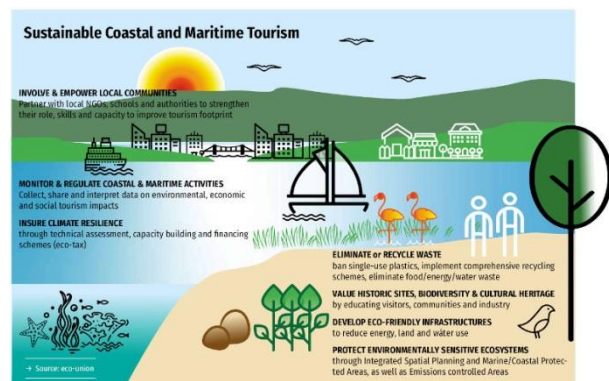
Protected areas have become tourist destinations and this activity can be an engine for the development of many territories, but at the same time tourist activities can pose a threat to their conservation.

For this reason, the development of ecotourism products that meet the

objectives of innovation, competitiveness, sustainability, as well as publicize the natural resources in the different protected areas, is a key objective for the tourism industry.

### Tourist package

Each of the natural spaces must have a system for public use designed by the environmental administration, a set of equipment and services that make up the offer that visitors and tourists use to make their activities in the park, either on their own or by hiring the services of tourist companies. The systems for public use include various equipment and services (signage, reception facilities, trails, visitor centers, guided tours, educational services). These services can be called a tourist package.



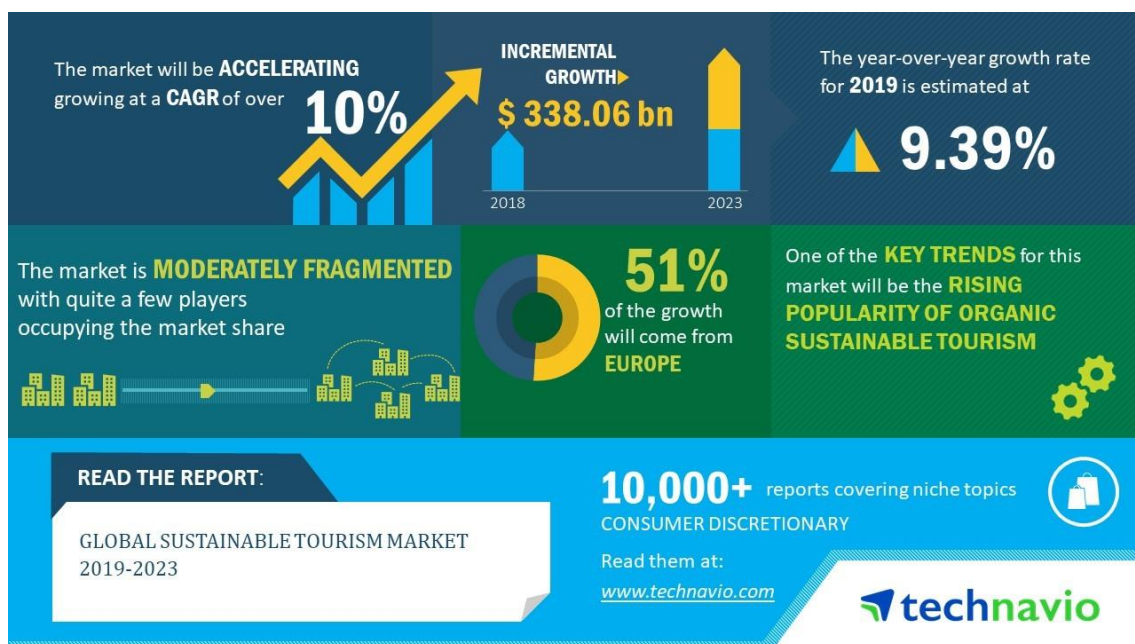
This package includes the most suitable services for public use that can be used by entrepreneurs when designing ecotourism packages that better show the park's values and take advantage of its services more efficiently, providing to tourists an experience based on the messages of the park, and at the same time attractive that meets their expectations of the visit of a protected area accredited because it is sustainable tourism.

### European Tourism Charter. Sustainable (CETS)

The final objective is the pilot design of ecotourism products in natural parks accredited with the European Tourism Charter. Sustainable (CETS), in order to help tourism entrepreneurs to create a specific offer that shows the space protected with the added value of contributing to the sustainable development of these territories. Therefore, these products must comply with the requirements of CETS, and of course with space

management instruments protected (Master Plans for Use and Management, Public Use Plans).

This model of implementation of the European sustainable tourism charters is working well in protected areas. The collaboration between the administration and private agents has allowed a very positive development in these areas but, one of the greatest weaknesses of many local territories is that their attractions are not treated as tourist products. This reduces the possibilities of competitiveness and differentiation in a tourism market that tends to diversify and innovate new tourism products based on sustainability criteria.



Thus, the main challenge for ecotourism is to get the companies offering them to professionalize for the most part and improve their competitiveness, in such a way that they can get access to sell their products in many potential markets from which they currently cannot. get. For this, Rural Development Groups include the rural development team of LEADER in their programming and carry out the application of sustainability systems for tourism activity. In this sense, some Rural Development Groups develop an inter-territorial cooperation project, following the approach LEADER +, which unifying aspect is the enhancement of the natural and cultural heritage, including the community areas included in the Natura 2000 Network.

Another important factor when designing ecotourism products and services is knowing the motivation of tourists to rest in nature, and secondly knowing the culture and

landscapes. The motivation that is most related to an ecotourism trip, knowing natural values, is only indicated as the main one by 12% of tourists who currently stay overnight in ecotourism destinations.

Most of the tourists prefer a short package for ecotourism, without investing more than 5 days in it. They are inclined to stay in rural houses and hotels compared to other offers. The size of the rural houses and the availability of places to make packages can be a limitation for the operators.

The current tourists of these parks are inclined to consume the packages ecotourism in small groups - families or small organized groups. This suggests the possibility of design packages that tourists themselves can access through the Internet.



# PRINCIPLES OF ECOTOURISM

Ecotourism is about uniting conservation, communities, and sustainable travel.  
by The International Ecotourism Society

- 1 MINIMIZE**  
PHYSICAL, SOCIAL, BEHAVIORAL, AND PSYCHOLOGICAL IMPACTS.
- 2 BUILD**  
ENVIRONMENTAL AND CULTURAL AWARENESS AND RESPECT.
- 3 PROVIDE**  
POSITIVE EXPERIENCES FOR BOTH VISITORS AND HOSTS.  
DIRECT FINANCIAL BENEFITS FOR CONSERVATION.
- 4 GENERATE**  
FINANCIAL BENEFITS FOR BOTH LOCAL PEOPLE AND PRIVATE INDUSTRY.
- 5 DELIVER**  
MEMORABLE INTERPRETATIVE EXPERIENCES TO VISITORS THAT HELP RAISE SENSITIVITY TO HOST COUNTRIES' POLITICAL, ENVIRONMENTAL, AND SOCIAL CLIMATES.
- 6 DESIGN**  
CONSTRUCT, AND OPERATE LOW-IMPACT FACILITIES.
- 7 RECOGNIZE**  
THE RIGHTS AND SPIRITUAL BELIEFS OF THE INDIGENOUS PEOPLE IN YOUR COMMUNITY AND WORK IN PARTNERSHIP WITH THEM TO CREATE EMPOWERMENT.

**THE INTERNATIONAL ECOTOURISM SOCIETY**  
[www.ecotourism.org/what-is-ecotourism](http://www.ecotourism.org/what-is-ecotourism)

To create a specific ecotourism offer as established by the CETS, that is, focused on communicating a message from the park and its management, it is essential to consider the facilities and services for public use managed by the park. Moreover, the objective of integrating the tourist offer into the model of public use of the protected space would be achieved, making better use of the equipment and services by incorporating them as a key part of the packages.

In short, tourism products must be created taking into account the following conditions:

- They will show the unique resources of the natural space;
- They will compulsorily include some service or equipment for public use with interpretation;
- They will be aimed at highly motivated clients;
- They will promote intimate and privileged contact with resources;
- They will be articulated through the interpretation of heritage (guided);
- They will be consumed by small groups;
- Specialized professionals will be in

charge of them.

This process of designing the ecotourism offer has been shown to be of a good help to entrepreneurs located in these destinations, by facilitating joint work between them

(entrepreneurs of accommodation and tourism service entrepreneurs), and adjust their offers to the preferences that a specific demand motivated by consuming sustainable tourism products in protected areas may show.

The institutional cooperation process has proven useful, so that in the future it could continue with actions that focus on making tourists identify these accredited protected areas and ecotourism packages as a sustainable offer. For this, it will be necessary to:

- Continue with technical assistance to design ecotourism products to support new agents that establish themselves in protected territories and spaces;
- Improve the definition of the ecotourism packages designed by the currently implanted entrepreneurs, improving their dissemination and adjustment with the tour operators;
- Promote the ecotourism packages designed by updating the web pages with a summary of the project and a theoretical summary of the packages, and by publishing a catalog of the tourist offer in the parks;
- Organize familiarization trips with packages for specialized operators;
- Support the Employers' Membership System with the development of a Guide for Employers;
- Continue with the training and awareness of tourism entrepreneurs with specific courses with the ESF.

### **2.3.8. Best practices**

#### ***Overview***

When searching for eco-friendly places to stay in Spain, people look for hotels, resorts and other accommodation providers, which actively promote renewable energy sources.

The main idea of ecological tourism – to keep the natural

The 2017 has been declared the International Year for Sustainable Tourism, giving people a new chance to become aware of the importance of traveling while respecting the environment and promoting reasonable economic development.

However, 2020 has brought even more necessities to travel within the country and thus – increased interest of the citizens towards ecological tourism.

The research has demonstrated that number of eco-friendly destinations has increased comparing to the previous years.

Spain leads the UNESCO Biosphere Reserves ranking, with a total of 48 protected areas that cover almost 11% of its territory, or 5.5 million hectares.

Many of Spain's natural spaces are accredited by the European Charter for Sustainable Tourism (ECST).

Furthermore, here is a selection of unique places to stay, which are considered sustainable and environmentally friendly. All of them are positive for ecotourism in Spain. From glamping to luxury villas, each destination is leading the way in recycling, efficient use of energy and ecological cleaners and finding new ways to reduce CO2 emissions.

### ***Examples and practices***

There is a large number of initiatives, institutions, NGOs, and even private businesses, which support ecological tourism in the country. This list consists of only the ones that can be truly believed as success stories and even examples to follow.

- ❖ The Association of Ecotourism in Spain (AES)

Web-page: [ecotouristinspain.com](http://ecotouristinspain.com)

A non-profit organization created in 2010. AES manages the Ecotourism Club in Spain and is focused on the sustainable development of Spanish Ecotourism destinations. The Ecotourism Club in Spain is a pioneering initiative that offers sustainable ecotourism experiences, ensuring the traveler his contribution to local development and to the conservation of biodiversity in the protected areas you visit and in the tourist services you enjoy.

**A great practice, working all around Spain – applying the concept of 'everyone is important' - made them a leader in the rank of NGOs.** Also, they not only investigate and arrange eco-trips to the places, but also promote education on the topic. For

example, while the pandemic occurred, they focused on education and organized a number of webinars: [www.youtube.com/user/SoyEcoturista/videos](https://www.youtube.com/user/SoyEcoturista/videos)

- ❖ An eco-camping for Benagalbón

Web-page: [www.eoi.es/es](http://www.eoi.es/es)

A group of entrepreneurs has set themselves in Benagalbón to create a unique sustainable tourism project in the province of Malaga. It is ecological glamping, that is, a campsite with cabins made with recycled marine containers in which customers will be able to carry out outdoor activities, including cultivating gardens and vegetables. Inside there will be a market and a restaurant.

The Tabia project was born in the fifth edition of the coworking program launched between the Rincón de la Victoria City Council and the School of Industrial Organization (EOI), with the co-financing of the European Social Fund, the Ministry of Industry, Energy and Tourism.

A great practice where their business-model made eco-camping name sound loud.

According to a study attached to this project, 87% of travelers say they want to travel in a sustainable and ecological way; 48% never or rarely manage to travel sustainably; 39%, often or always manage to travel in a sustainable way.

- ❖ Eco-boat from the Galician engineer Xouva

Web-page: [www.xouvaboats.com](http://www.xouvaboats.com)

Maritime and river tours through nature, without unpleasant noises that break the magic and causing minimal damage to the environment. This is what **Xouva 4.90** offers, a tour boat, with capacity for eight people, designed by the Galician engineer José Ballester, which is already an example of transport at the service of more ecological tourism.

A successful initiative. Its business approach of making every buyer unique and contributing to the nature saving made Xouva deserving a title of 'success story'. Furthermore, its product is very relevant to the current situation in the country, when people discover their countries in the pandemic situation.

- ❖ Red Natura 2000

Web-page: [activarednatura.es](http://activarednatura.es)



The region of Molina de Aragón joins the Ecotourism regional cooperation project in the Red Natura 2000 Network. It is aimed at companies in nine regions of Castilla-La Mancha to promote sustainable tourism in the area and their own survival.

The objective works in cooperation with touristic companies that voluntarily wish to train to offer ecotourism experiences and promote the Natura 2000 Network spaces of the nine participating regions, to improve their profitability, and carry out a differentiated promotion of these regions to reach consumers.

*Good practices applied:* the project has a vertical and comprehensive approach by joining the Ecotourism Club in Spain so that the results have continuity, improving the use of natural and cultural heritage and positively influencing the economy of the participating territories.

#### *Summary*

Last but not least, in 2020, the World Travel Awards, known as the Oscars of tourism, have announced the winners of Europe, in which several Spanish companies and destinations have been awarded. The World Travel Awards was established in 1993 to recognize the excellence of companies and destinations in the sector.

There is also an ecological award in the list – the best ecological hotel belongs to Tenerife.

In its latest edition, and taking into account only the European sphere only, the following Spanish destinations and companies have been recognized as the best in Europe:

- Barcelona: Best destination for events and festivals
- Madrid: Best destination for meeting tourism
- Vueling: Best Regional Airline
- Hilton Diagonal Mar Barcelona: Best hotel for meetings and conferences and Best business hotel
- La Manga Club (Murcia): Best sports resort
- Royal Hideaway Sancti Petri (Cádiz): Best Beach Hotel
- Lopesan Costa Meloneras Resort & Spa (Gran Canaria): Best casino resort
- Kempinski Hotel Bahia (Málaga): Best entertainment and restaurant resort
- Bahía del Duque (Tenerife): Best hotel and luxury villas
- Can Bordoy Grand House & Garden (Mallorca): Best suite hotel
- GF Victoria (Tenerife): Best ecological hotel
- Roiback: Best Solution Provider for Hotel Reservations

Speaking about tourism products, there are many eco-destinations, which will help to offset one's carbon footprint, or even reduce it whilst you are visiting. This fact makes Spain even more attractive and diverse according to the people's tastes. We also take into account that Spain is very popular not only among its own citizens but also for people from all around the world.

Moreover, we remember that global warming and ecological catastrophes are still the most urgent issues worldwide. Even despite the pandemic problem, which influenced humans' lives enormously (traveling in Spain is on a low mode now) tourism is still developing its potential.

Here is [the list of the most ecological destinations](#) around Spain and a map of Spain with eco-touristic destinations on it:



1. Andalusia**	2. Aragón	3. Asturias	4. Balearic Islands	
5. Basque Country	6. Canary Islands	7. Cantabria	8. Castilla La Mancha	
9. Castilla y León	10. Catalonia*	11. Extremadura	12. Galicia	
13. La Rioja	14. Madrid*	15. Murcia	16. Navarra	17. Valencia*

The source: [bit.ly/2JmJFWx](http://bit.ly/2JmJFWx)

## 2.3.9. Legal framework

### A Picture of Spanish Legislation on Sustainable Tourism

#### *Overview*

Tourism is a central key in the Spanish economy, as it is one of the crucial pillars of employment's creation (12,2% of total contributors to the Spanish Social Security) and an extremely relevant source of incomes at local, regional and national level (11,7% of the Spanish GDP). Due to its strategic weight, tourism public policies have been developed by the Spanish Government in the last lustrum with the aim of promoting nature tourism and preserving the eco-systems and biodiversity in the territory. Those public policies and sectoral plans have been supported by the Spanish Parliament and the Regional Legislative Assemblies, being in concordance with the strategies recommended by the European Union. Furthermore, the Spanish Government assumed Sustainable Development Goals for the Agenda 2030 as priority action lines.

The most relevant guidance is the **Sectorial Plan on Nature Tourism and Biodiversity 2014-2020** (Plan Sectorial de Turismo de Naturaleza y Biodiversidad 2014-2020):

This sectorial plan is the result of a legislative and regulatory process starting with the **42/2007 Natural Heritage and Biodiversity Law** (Ley 42/2007 del Patrimonio Natural y de la Biodiversidad), which has, among its main principles, the appropriate use of natural resources to guarantee the sustainability of our natural heritage. Moreover, it pursues the integration of the biodiversity perspective in the sectoral policies.

Basing on this law, a strategic plan was elaborated under the name **Strategic Plan for Natural Heritage and Biodiversity 2011-2017** (Plan Estratégico del Patrimonio Natural y de la Biodiversidad 2011-2017). One of its goal was to promote the sustainability of nature tourism, and incorporate the biodiversity concept as a transversal key element in the tourism, energy, industry and environmental sectoral policies. In order to bring together all those initiatives, a final plan was approved called **Sectorial Plan on Nature Tourism and Biodiversity**, under the **416/2014 Rule**.

Due to the relevance of the tourism sector in Spain and the extensive natural heritage the country owns, the **Sectorial Plan on Nature Tourism and Biodiversity** is focused on reinforcing positive synergies to facilitate ecotourism. The goal of this plan is to highlight

the importance of Spanish biodiversity and promote nature tourism as an important economic activity to create employment and preserving the natural resources of the territory. Another interesting point is the collaboration of all the actors involved, from the public and private sector, in this action line.



LEGISLACIÓN CONSOLIDADA

Real Decreto 416/2014, de 6 de junio, por el que se aprueba el Plan sectorial de turismo de naturaleza y biodiversidad 2014-2020.

Ministerio de la Presidencia  
«BOE» núm. 147, de 18 de junio de 2014  
Referencia: BOE-A-2014-6432

TEXTO CONSOLIDADO  
Última modificación: sin modificaciones

The sectoral plan, elaborated by the Ministry of Agriculture, Food and Environment and the Ministry of Industry, Energy and Tourism with the involvement of the Regional authorities (Autonomous communities) and different Spanish tourism commissions. The plan is structured around four objectives:

1. Promote sustainable nature tourism destinations and products.
2. Stimulate an eco-tourism product in Spain linked with the Nature Network 2000.
3. Make known the biodiversity concept in nature tourism activities.
4. Improve knowledge, information and training related to nature tourism.

❖ Nature 2000. System for the Recognition of the Sustainability of Nature Tourism in the Nature 2000 Network:

Nature 2000 is a European ecological network whose objective is to preserve biodiversity. Its purpose is to ensure, in the long-term, the survival of species and their types of habitats in Europe. It is the main instrument for nature conservation in the European Union. The Spanish Government joined that network, and it is using the system for the recognition of the sustainability of nature tourism.

The system is a tool created to identify areas of Nature 2020 network and companies which carry out their activities of nature tourism in a sustainable way, being compatible with the preservation of biodiversity. The system expects to:

- Enhance the Nature Network 2000 and contribute to its preservation by improving the management and the public use of nature tourism.
- Involve tourism companies in the management and conservation of the spaces.
- Provide competitive advantages to committed companies.



Spanish brand of ecotourism

❖ **Spanish Sustainable Tourism Strategy 2030** (Estrategia de Turismo Sostenible de España 2030):



The Government of Spain, through the Secretary of State for Tourism, is elaborating the Sustainable Tourism Strategy 2030: a national tourism agenda to face the challenges of the sector in the medium and long term. It aims at promoting the three pillars of sustainability: socioeconomic, environmental and territorial. To this end, a participatory process involving the tourism sector and the regional community authorities is taking place. The new model expects to improve the competitiveness and profitability of the tourism industry, along

with the conservation of nature and cultural heritage.

The Strategy proposes a tourism growth model for the coming years based on the following principles:

- **Socio-economic growth**, by improving the competitiveness and profitability of the sector.
- **Preservation of natural and cultural values**, assuming the conservation of the Spanish cultural and natural heritage as a priority goal.
- **Social benefit**, to achieve a distribution of the benefits of the sector, and face challenges such as the depopulation of rural areas in Spain.
- **Participation and governance**, structuring participatory governance mechanisms between the State and the local and regional administrations.

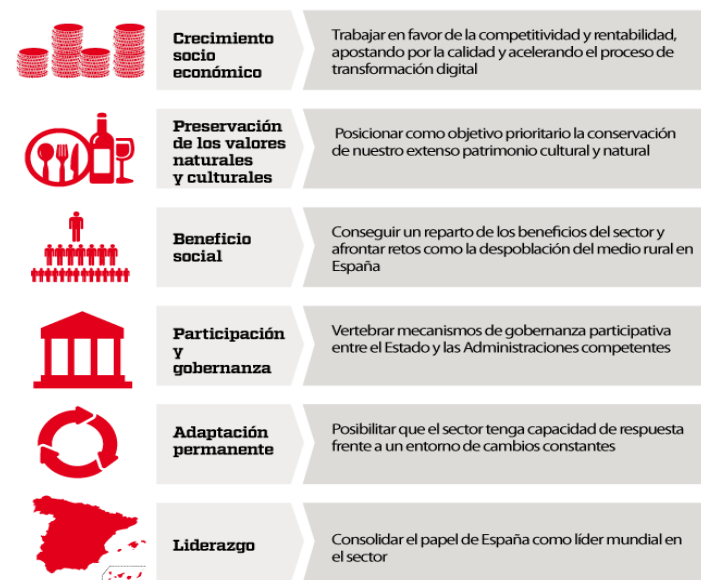
- **Permanent adaptation**, to enable the tourism sector to be adapted to the new changes in the field.
- **Leadership**, which aims to consolidate Spain's role as a world leader in the sector.

**Five key points** have been defined in the mentioned agenda for the tourism sector:

1. Collaborative governance
2. Sustainable growth
3. Competitive transformation
4. Tourist places, companies and people
5. Products, marketing and tourism intelligence.

## Un nuevo modelo turístico sostenible

Estrategia de Turismo Sostenible de España 2030<sup>1</sup> propone los siguientes principios:



Fuente: Ministerio de Industria, Comercio y Turismo. Gobierno de España.

elEconomista

Source: Ministry of Industry, Commerce and Tourism. Spanish Government

### 2.3.10. Results of interviews in Spain

This report has been drafted according to the interviews carried out in December 2020 - January 2021, with representative actors in the ecotourism environment in Spain, including an example of each questionnaire type; being prominent entities in different areas of the country, and with different status, dimension or scope; with the aim of providing a realistic and productive image as possible.

- Agritourism:
  - Racing de Inversiones S.L., a rural tourism and agritourism company with activity in the northwest of Spain and the north of Portugal.
  - Hotel Rural Morvedra Nou, a rural hotel in an agritourism environment.
- DCM:
  - Hemisferios S.L., a tourism promotion and tourism services company, which is an example of success
  - Redontur S.L., a tour operator with significant experience in this field.
- Natural Park:
  - Jaca Natural Park, an official natural park in the Aragon region, near the Pyrenees.
  - Islas Cíes Natural Part, an official natural park in the Galicia region, in the Atlantic coast
- Public Admin:
  - Turgalicia, public body of the Government of Galicia - region of Spain- for the promotion of tourism.

The reality detected is described below, including both the situation faced by these entities, as well as their perception and deep knowledge of the sector.

#### **AGRITOURISM**

This type of tourism in Spain has been very strong for 20 years, when the different local governments decided to financially support agritourism initiatives to compensate for the abandonment of agricultural environments and small towns. In this context, the reality that we have been transferred in the interview is the following:

- It is a subsector composed almost exclusively of small companies and some medium-sized companies.
- It arose as an opportunity, without having a specific adequate training.



- The existing training is divided into specific training for agricultural tasks, and generic business training.
- The dispersion of the offer makes it difficult to promote it.
- The owners are mostly people between 40 and 55 years old, who began their professional activity in the greatest period of subsidies for agritourism and rural tourism.
- Products, product packages, and services are mostly individualized, and depend on each situation, company and client; without existing reference products.
- Although there are no reference products, there are common and highly valued elements in agritourism in Spain: agritourism linked to agricultural products (food and drink), social agritourism of return to the villages from the perspective of farms, summer agritourism linking agricultural environments and sports.
- The high season occurs in summer, mainly from June to September, although there was a change in trend with the arrival of COVID-19.
- The evaluation of their own business before COVID-19 was 3.
- They do not have problems with accommodation, local transport, complementary services, promotion and quality of personnel.
- The consideration of ecotourism businesses is given by their special relationship and respect of the natural environment in which they carry out their activities. These activities include the promotion of local products.
- In a general approach, they have plans for the next two years to overcome the impact of COVID-19 and develop new service models based on digitization.
- Training as a way for overcoming the problems and reaching a new goal is accepted for all of them but they are asking also for the support of the administrations.
- The online training is acceptable for all the people in the time of pandemic, however, they all prefer face to face learning.
- About experience in training, all of them have had a lot of training and have some good practice to share.
- They do not have training in their company.

## **DCM**

The ecotourism market in Spain is heterogeneous, and a very important part of its main marketing channels are outside the most common circles of the main tourist packages.

Due to this situation, and its recent strength, there are companies exercising destination management that at the same time have their own local businesses or local tourist resources; acting not only as agents but also as service providers. Ecotourism companies that have grown enough end up taking this type of position, managing on many occasions both their own tourism resources and foreign tourism resources.

- The interviewed companies work in the north-west of Spain and north of Portugal.
- Its capacities do not stop growing year after year, both in volume, as well as in its own and third-party resources.
- The usual owners and managers of this kind of ecotourism actors in Spain are mostly people between 35 and 55 years old, most from the general tourism sector.
- One of the most frequent problems is the difficulties to minimize costs by standardizing the product, when the tourist packages in this context are very different, and the degree of adaptation to the demand, type of client, or season is very high.
- In the peak season, usually in summer, these companies have from 20 to 35 employees.
- The preferred activities of the foreign customers that are ecotourism products are: local gastronomy, trips and discoveries, but also hiking, trekking, biking, mountain biking, wildlife watching, rural tourism.
- The preferred activities of the domestic customers that are local gastronomy, trips and discovers, but also hiking, trekking, biking, mountain biking, wildlife watching, rural tourism.
- Some problems were mentioned in accommodation, while others also emerged in local transport services. This depends on the specific packages. In large ecotourism environments there is more standardization, and there are no accommodation or transport problems; In new environments or with scattered supply, it depends on the circumstances of the moment, now even more with the consequences of COVID-19.
- Training is highly valued as a way to overcome problems, but until now the training has only been generic, comparable to any other type of tourist offer; not specific in ecotourism.
- The online training is highly valued but for some kind of training, you need face to face mode.

## NATURAL PARKS

In Spain there are 15 National Parks: 10 are in the Iberian Peninsula, 4 are in the Canary Islands and 1 in the Balearic Islands. Its activity is governed by law, and its management depends on state or regional public companies. In this case, its resources or exploitation cannot be subcontracted, as it happens in public tourism resources outside the National Parks. This totally conditions their activity.

- Natural parks in Spain usually offer similar products, which, despite not being standardized, due to the differences in characteristics of the natural parks, move along similar lines of service.
- The parks aim to provide experiences with a high quality and a high value that provide fun and knowledge, and a positive perspective of the natural environment, as well as environmental care.
- Legislation obliges natural parks to limit themselves to using existing accommodation resources, and to have a network of regular providers when it comes to configuring their offer or promoting tourism in the park.
- We contacted with two different national parks and collected information from technicians and workers, both males, age 48 and 31, with graduate degrees.
- According the interviewed professionals, the most suitable areas for ecotourism in Spain are its national parks (Teide, Guadarrama, Picos de Europa, Timanfaya, Garajonay, Sierra Nevada, Ordesa and Monte Perdido, Aguas Tortas and Lago de San Mauricio, Caldera de Taburiente, Islas Atlánticas, Doñana, Monfragüe, Tablas de Daimiel, Archipiélago de Cabrera, Cabañeros).
- The ecotourism activities mainly carried out in the parks are: trekking, biking, mount biking, horse riding, wildlife watching, rural tourism and ski cross country.
- All mentioned ecotourism products are interesting for domestic and foreign tourists, both.
- The objectives of the park with regard to ecotourism are: promotion of the tourist destinations offered by the park, promotion of its natural resources, traditional food and traditional architecture; raising awareness of ecotourism; attracting more foreign tourists.
- The parks are planning to work in ecotourism in the next 2 years in this direction: to apply for development of digitalization.
- There is an info center in the parks, which is visited usually by the tourists, for the information and their safety.
- The parks have cooperation with many companies working on ecotourism.

- The parks have their its own official budget.
- There are no specific training plans for each park, rather they are managed globally throughout the country, which leads to having the same training resources for very different ecotourism realities in very different environments.
- The parks are opened for training in capacity building, and also in training the people to open their own businesses, and for involvement of rural women in ecotourism.
- The on-line training is accepted in the period of COVID-19.
- They have experience in being trained for capacity building and digitalization.

## **PUBLIC ADMININS**

The Spanish public administrations, as responsible for the development of the tourism business in one of the countries with the most important tourism sector in the world, have different public entities, public companies, and public bodies, to promote, support, manage and legislate the development of the tourism in general, including ecotourism and sustainable tourism.

Turgalicia is the public entity of the government of Galicia, a region in the northwest of Spain, to manage and promote tourism in Galicia. This mainly includes the management and promotion of coastal tourism, the management and promotion of all tourism around The Way of Saint James, and the management and promotion of inland tourism. In all three cases, being a traditionally green community, with large and important natural spaces, and a long tradition linked to agriculture and scarcity, it causes sustainable tourism to be present in all three lines, and that the promotion of ecotourism is one of your main goals.

- In Spain, the promotion and management of tourism is carried out simultaneously at the state level, by the government of each region, and at the local level by each municipality. Except in large common programs, usualy there is no coordination between them, undermining the generation of synergies and the sustainable use of resources.
- Turgalicia actively collaborates with the largest tour operators in Spain, and with some of the most prominent tour operators in Europe and the world.
- We contacted with a technician of TurGalicia, a female of 52 years old.
- The preparation and proposal of regulations in the matters of its competence.

- The management and coordination of actions that may have an impact on tourism are developed within the scope of the Administration of the Autonomous Community.
- The establishment of effective channels of communication with other local, provincial and central administration bodies and other administrations, as well as with the private sector.
- The development and management of comprehensive tourism plans to apply in geo-destinations and / or tourist establishments, betting on innovation, quality and sustainability of the tourist products that make up the portfolio of tourist products in Galicia.
- The use and enhancement of the tourist resources of Galicia through the promotion, advertising, public relations and other actions of notoriety, both within Galicia and in the rest of Spain and abroad, without prejudice to the powers of the central Administration of the State.
- The main goals of the institution towards ecotourism are “The planning of the policy of management and inspection, promotion and competitiveness of ecotourism within the Autonomous Community, determining the lines of action of tourism policy, balanced and sustainable, which should govern in the Galician territory.”
- Available budget for tourism 12,6 M€.
- The ecotourism activities are: hiking, trekking, biking, mount biking, horse riding, wildlife watching, rural tourism and ski cross country.
- The most suitable for ecotourism are Illas Atlánticas National Park, the Ribeira Sacra Environment, Rias Baixas, and the historical agricultural environment of any of the four Galician provinces.
- The preferred ecotourism products of the foreign tourists are: biking, mountain biking, rural tourism, ski cross country.
- The preferred ecotourism products of the domestic customers are: biking, mountain biking, wildlife watching, rural tourism, ski cross country.
- There are no problems in ecotourism in all mentioned areas: accommodation, local transport, complementary services, promotion, quality of personnel. Tourgalicia is a reference for the whole of galician tourist companies, and its providers nets
- Training is highly valued as a way to overcome problems.
- The online training is highly valued but for some kind of training, you need face to face mode.

## 2.4. Ecotourism in the NORTH MACEDONIA

This empirical research about ecotourism was elaborated based on a number of studies with an ambition to distinguish between mainstream and alternative tourism, the latter including ecotourism.

### 2.4.1. Relevant studies elaborating on ecotourism in North Macedonia

The ***National Strategy for Sustainable Development (NSSD)*** was endorsed by the Government of North Macedonia in January, 2010. The NSSD aims to ensure economic development that is socially responsible and accountable, environmentally acceptable and lays upon the basic principles of a civil society, for a long-term period of 20 years (2009 – 2030). Tourism has been recognized as an important economic sector, which defines several types of tourism potentials for sustainable development: mountain, spa, rivers and lake tourism, eco-tourism, hunting and fishing, cultural, transit, speleological, rural and urban tourism. The NSSD brings forward an excellent SWOT analysis for the tourism sector, acknowledging properly the sustainable tourism.

The NSSD identifies 10 regions, each of them possessing potentials for the development of various types of tourism (*Table 1: Types of tourism per region of the country, as defined in different strategies*).

The following 10 tourist regions have been identified: Skopje-Kumanovo, Shara – Polog, Mavrovo – Debar, Kicevo – Brod, Ohrid – Prespa, Pelagonic – Pelister, Mid – Vardar, Strumica – Radovis, Bregalnica and Kratovo- Kriva Palanka.

***The National Strategy for Agriculture and Rural Development*** for the period 2009 – 2013 stressed tourism and agriculture as priority sectors for the country's development. Furthermore, the relevant Ministry of Agriculture, Forestry and Water Management introduced national programs aiming to respond to the defined strategic priorities and following the global trends for creating self-sustainability in the rural regions by development of agriculture and ***additional incomes*** of the rural families.

***National Strategy for Development of Rural Tourism (NSDRT)*** for the period 2012 – 2017 was prepared by the Ministry of Economy aiming to conceptualize rural tourism as

a development priority for the tourism in North Macedonia. It proposes an easy-to-implement action plan, detecting infrastructure improvement and human knowledge developing in rural areas as priority measures.

The NSDRT presents the rural tourism's definition of the World Tourism Organization (WTO): "**when the rural culture is the key component of the product and offer of one destination**". Consequently, the **rural tourism** encompasses: agri/farm-tourism, camping in nature, village tourism, eco-tourism, activities such as hunting, fishing, biking, wine tourism and gastronomy, hiking, riding, etc.

This NSDRT identifies the following 15 tourist destinations: Debar – Kicevo, Vevcani, Ohrid – Prespa ethno-eco region (Galicica), Mavrovo – Rostuse, Polog, Osogovija, Kumanovsko, Azot, Maleshevija, Tikveshija, Ethno and spa region Belasica, Krushevo, Pelagonija, Mariovo and Rural Skopje.

The **National Strategy for the Development of Tourism (NSDT)** for the period 2016 – 2021 established a framework by defining the key directions for further tourism development, based on the natural and cultural heritage, unicity, quality of products and traditionally warm hospitality. Primarily it makes fair evaluation of the implementation of the previous strategy (for the period 2009 – 2013);  $\frac{3}{4}$  of all proposed actions (over 80) have been fully or partially implemented. It also provides detailed information of country's global ranking within the "Travel & Tourism Competitiveness Index" (TTCI) which measures "*the set of factors and policies that enable the sustainable development of the Travel & Tourism sector, which in turn, contributes to the development and competitiveness of a country*". The methodology is organized into four subindexes and is based on 14 pillars, out of which one belongs to "*environmental sustainability*". In the last TTCI for 2015, North Macedonia got the lowest scores for "*environmental sustainability*" on the 107th place (out of 133 countries) and for "*natural resources*" on the 121st place. Furthermore, the NSDT provides very detailed analysis of the current situation, national, regional and global trends, main destinations and their attractiveness, framework conditions and a good SWOT analysis. This strategic document recognizes 12 main types of tourism generating substantial demand worldwide; **nature/eco-tourism** is recognized amongst them. The pre-conditions for nature/eco-tourism are defined as: (1) Natural and unspoilt landscape, (2) Intact flora and fauna, (3) Traditional culture and way of living and (4) Organic food. In this respect, the NSDT recommends to base the future positioning of North Macedonia regarding tourism on four main pillars: Skopje, Lake Ohrid, North Macedonia culture and **Nature**

**experience.** Finally, the Strategy proposes a detailed Action plan with 7 Main actions and 26 Supporting actions in the targeted period.

This NSDRT identifies the following 5 main tourist destinations: the lakes (Ohrid, Prespa and Dojran), the cities (Skopje, Bitola, Kumanovo, Prilep and Tetovo), the mountain destinations (Popova Shapka, Krushevo, Mavrovo, Kopanki/Pelister and Kozhuf), wine destinations (Povardarje -Vardar Valley, Other locations with vineyards), and spa destinations (Bansko, Kezhovica, Negorci, Katlanovo, Banka, Proevska, Kosovrasti, Banjishte).

**Local and Regional Competitiveness Project (LRCP)** is a four-year investment operation financed with an 18.000.000 euro grant from the European Union (IPA II), and co-financed by the Government of North Macedonia with 3.176.471 euro. The Project is based on a holistic approach to tourism development and destination management and provides investment funding and capacity building to support sector growth, investment in destinations, and specific destination prosperity.

The Project Development Objective of the LRCP is to enhance the contribution of tourism to local economic development and improve the capacity of the Government and public entities to foster tourism growth and facilitate destination management. Over the course of its 4-year implementation (by end of 2020), this project developed precise

Tourism Development Plans (TDP) for 10 destinations in North Macedonia: Skopje-Kumanovo, Polog – Tetovo – Popova Shapka, Mavrovo – Reka, Gevgelija - Dojran, Ohrid – Prespa, Pelagonija, Tikveshija, Strumica, Shtip – Radovis and Maleshevo.

Based on desk-top and survey research, these plans identified crucial gaps for all ten destinations, providing more specific proposals to overcome these gaps.

The potentials for eco-tourism are not presented in these TDP and this term is not used at all. However, the eco-tourism concept are included in the development goals of several destinations, such as:

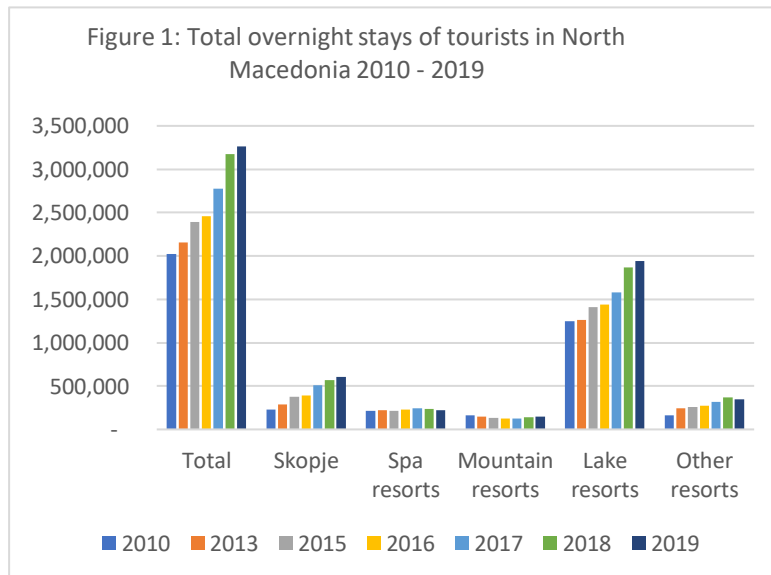
- 1) Better conservation of ecosystems and natural resource management
- 2) Preservation of local traditions and culture including handicrafts and heritage structures
- 3) Increased awareness of the importance of environment protection



#### 4) Increased linkages with agriculture

### 2.4.2. Domestic and international demand

As anywhere else in the world, the sector of tourism in North Macedonia shows significant increase over the past decade, contributing to the “4<sup>th</sup> Globe Revolution”. A 61.49 % increase is observed in the total overnight stays from 2,020,217 in 2010 up to 3,262,398 in 2019, (Figure 1). The total turnover in accommodation and catering sector at actual prices shows an increase of 105.66 % for the same period (from 119,551,350 EURO<sup>60</sup> in 2010 up to 245,865,278 EURO<sup>61</sup> in 2018), as presented in Table 2 (Chapter II.1).



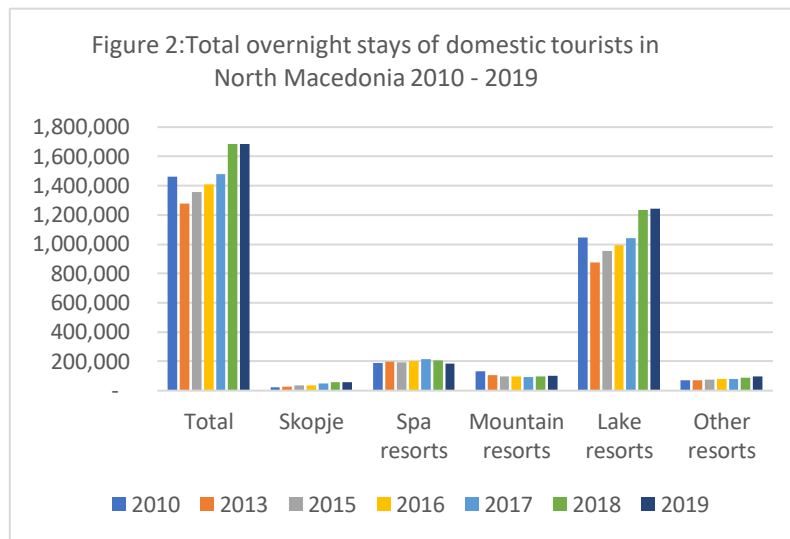
While the total number of domestic tourists<sup>62</sup> increased by 13.3 % in the period 2010 - 2018, (Figure 2), this number for international (foreign) tourists increased significantly by 62.52 % (Figure 3).

<sup>60</sup> Conversion rate of National Bank of Republic of North Macedonia is used 61.5 MKD = 1 EURO on 01.12.2010

<sup>61</sup> Conversion rate of National Bank of Republic of North Macedonia is used 61.69 MKD = 1 EURO on 01.12.2020

<sup>62</sup> “A tourist shall be any person who temporarily stays outside his permanent residence at least one night in an accommodation establishment or another catering facility” is a definition of the State Statistical Office.

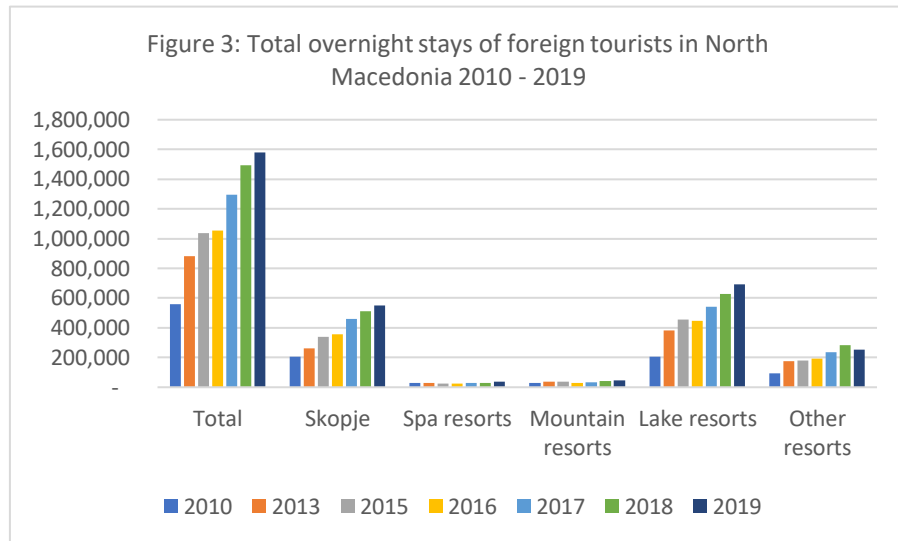
Besides the global increase of the travel industry, the difference between the domestic versus foreign tourists might be due to the fact that in 2010, the Skopje International Airport was contracted to company TAV for a 20 years concession period. In September



2011 the new Airport building was already operational and several new flight destinations towards European cities have been opened. TAV also manages the Ohrid Airport where the number of flights and new destinations increased in the past decade.

Unfortunately, the State Statistical Office does not segregate data for the category “eco-tourism”, nor even for “rural tourism”, even though the latter is recognized as such in the legislation. We can draw some conclusions just by looking at the number of overnight stays in specific areas, such as mountain, lake and spa areas, e.g. all those which do not belong to the capital city, lake and spa resorts as well as existing mount huts. There is also a category “other resorts” which shows constant increase from a total of 162,968 overnight stays in 2010 to 368,957 in 2018 (or 126.4 %) which might consider accommodations in rural and mountain areas.

Interestingly, while the domestic tourists decrease their interest for overnight stays in mountain resorts for 24.81%, foreign tourists show increase of 43%



By providing of new, small accommodation businesses throughout the country in rural and mountainous areas, domestic and international tourists are permanently increasing the interest for visiting pure natural areas to enjoy recreational activities, traditional gastronomy and cultural traditions.

Foreign tourists show incredibly higher demand for lake resorts, up to 206.7 % for the period 2010-2018, which leads to a conclusion for growing of the international demand for natural (eco) tourism.

in the period from 2010 to 2018. Foreign tourists also show an incredibly higher demand for lake resorts than domestic tourists, up to 206.7 % for the same period, which contributes to the conclusion for growing international demand for natural tourism.

### 2.4.3. Tourist destinations

The aforementioned strategies and studies focus on 10 main destinations (Table 1). The ‘destinations’ are not defined by administrative boundaries, but rather by key elements that make up a destination from a visitor perspective. This destination therefore includes the natural, cultural and man-made attractions, facilities, services and resources that make up this particular hub of tourist activity.

Table 1: Major Tourist Destinations

Regions per NSSD	NSSD definitions for eco-tourism basis, as defined by tourism experts	National Strategy for Rural Tourism Development	Defined Visions by 2030 for destinations by LRCP project
Skopje-Kumanovo	Basic for eco-tourism This region comprises the Skopje and Kumanovo Valley and the mountain area that surrounds them. The attractiveness of the area enables differentiation on eight tourist zones where total a 17 localities are found.	The destination of Kumanovo can offer: authentic ethno-villages, monasteries, healing waters, local humoristic manifestations, gastronomy.  Specific target groups: healing waters.	<b>Vision<sup>63</sup>:</b> In 2030, Skopje will have established itself as a strong competitor to other European cities of its size as a center for city breaks, with a reputation for excellent food and wine, high quality arts and crafts and the rich cultural heritage of the city and its region. We will be a gateway to Macedonia for international visitors on longer breaks and holidays, particularly for the culturally curious, adventurers and free spirits, actively helping them to understand and explore the richness of Macedonia's offer, with themed routes to take them out to all parts of the country.
Shara - Polog	This region is made by the exotic nature, woodland and clean air as a basic characteristics for eco-tourism development.	The destination can offer: authentic ethno and eco-villages, monasteries, local manifestations, hiking, gastronomy.  Specific target groups: ethno and eco-tourism, as well as extreme sports.	<b>Vision:</b> In 2030, Polog will be known as a leading mountain destination in the Balkans, an ecological pearl enticing nature- and culture-loving travelers from Macedonia, the Balkans and beyond. Our preserved and rare natural beauty, organic and traditional food offerings and

<sup>63</sup> The data used in this section was collected during a destination management workshops with targeted stakeholders during January 2018 in different places in North Macedonia

Regions per NSSD	NSSD definitions for eco-tourism basis, as defined by tourism experts	National Strategy for Rural Tourism Development	Defined Visions by 2030 for destinations by LRCP project
			diverse culture will provide rich, year-round experiences.
Mavrovo - Debar	Opportunities are based on the bevel configuration of the space with impressive and rare geomorphological forms, the good weather conditions, hydrographic values, the nature resource of vegetative content elements of the environments, the variety of the animal world and the interesting cultural heritage.	The destination can offer: authentic ethno and eco-villages, monasteries, local manifestations, hiking, gastronomy (sheepfolds with authentic products).  Specific target groups: ethno and eco-tourism, as well as extreme sports.	<b>Vision:</b> In 2030, Reka will be famous among nature- and culture-loving travelers from Macedonia, the Balkans and beyond for its year-round diverse and engaging outdoors and heritage experiences showcasing the richness of local flora and fauna combined with distinctive culinary offerings based on old farming traditions and the exceptional number of naturally healing herbs growing in the area.
Kicevo - Brod	Region with significant authenticity of the values of the environment. Localities Samokov, Belica, Buseva Cesma and Pesna are very picturesque and the	The destination can offer: authentic ethno-villages, fisheries, monasteries, local manifestations, eco-tours, festivals, gastronomy.  Specific target groups: ethno and eco-tourism.	Not defined as a separate destination

Regions per NSSD	NSSD definitions for eco-tourism basis, as defined by tourism experts	National Strategy for Rural Tourism Development	Defined Visions by 2030 for destinations by LRCP project
	most important tourist space units.		
Ohrid - Prespa	It possesses remarkable natural and cultural heritage, encompassing the oldest lake (Ohrid Lake) in Europe, the national park “Galicica”. The wider area (Prespa Lake excluding) is designated as an UNESCO World Heritage Site due to its outstanding universal values – landscape, high endemism and cultural assets.	The destination can offer: authentic ethno-villages, biodiversity, monasteries, local manifestations, eco-tours, sport manifestations, gastronomy.  Specific target groups: ethno and eco-tourism, as well as extreme sports.	<b>Vision:</b> In 2030, we will have retained our position as Macedonia’s best-known and most visited destination, whilst also increasing the profitability and sustainability of the tourism industry and its economic impact. We will offer year-round adventure, wellness, culinary and cultural experiences and a series of new events and festivals, including Ohrid food and wine festival. The strength of our offer will also have been broadened through ecotourism development in UNESCO’s Prespa and the National Parks sites,– also extending the distribution of tourism’s benefits more widely.
Pelagonic - Pelister	Attention deserve the impressive stone forms in the locality Markovi Kuli near Prilep, deserves particular attention. Indeed, it was proclaimed a monument of culture. Among the	The destination can offer: monasteries, local manifestations, eco-tourism, National Park Pelister, hiking, gastronomy.  Specific target groups: ethno and eco-tourism.	<b>Vision:</b> In 2030, Pelagonija will be renowned as the premier adventure destination of Macedonia, offering visitors an abundance of exciting experiences the whole year-round in a spectacular mountain landscape, combined with enjoyment of good food, cultural heritage and living Macedonian traditions. The quality of the adventure opportunities,

Regions per NSSD	NSSD definitions for eco-tourism basis, as defined by tourism experts	National Strategy for Rural Tourism Development	Defined Visions by 2030 for destinations by LRCP project
	<p>picturesque areas, Mariovo is very attractive: special attraction represents the Skocivirska ravine, situated at Crna Reka in the eponymous locality. Mount Baba with peak Pelister was proclaimed as National Park in 1947, as the oldest in N. Macedonia. Its surface is 10,400ha. The coverage of almost 88 ligneous plants or 29% of the total dendro-flora in N. Macedonia makes it a natural arboretum.</p>		<p>together with the excellent sunshine record and authentic hospitality, enable Pelagonija to attract adventure travelers from throughout Europe and beyond.</p>
<p>Mid – Vardar (Tikvesh region)</p>	<p>The attractive area is located at the montain Kozuv with the volcano. The most qualitative grape is cultivated in the Kavadarci/Negotino area. Special attraction on mount</p>	<p>The destination of Azot area can offer: traditional architecture, unique natural and historical attractions, monasteries, eco-tours, gastronomy, hiking and other</p>	<p><b>Vision:</b> In 2030, tourism will be a key part of our local economy by offering outstanding experiences in local wine, food, cultural heritage and outdoor activities. We will be offering these experiences to travelers from Macedonia, the Balkans and beyond.</p>

Regions per NSSD	NSSD definitions for eco-tourism basis, as defined by tourism experts	National Strategy for Rural Tourism Development	Defined Visions by 2030 for destinations by LRCP project
	<p>Jakupica is the karst area under the Nezilovi cliffs at the elevation of 1760 m and the spring of river Babuna.</p>	<p>alternative sport experiences. Specific target groups: ethno and eco-tourism.</p>	
Strumica - Radovis	<p>The Mountains Belasica, Plackovica and Ograzden are extraordinary areas for picnic and walks. The pleasant stay in this region is due to the climate conditions. Koleshinski, Smolarski and Gabrovski waterfalls on Belasica mountain are amongst the most attractive in N. Macedonia.</p>	<p>The destination of Ethno and spa region of Belasica Mountain can offer: authentic nature with waterfalls, thermal waters, ethno-villages, monasteries, local manifestations, hiking, gastronomy. Specific target groups: ethno, eco and spa tourism.</p>	<p><b>Vision:</b> In 2030, Gevgelija will have capitalized fully on its central location, and diversifying the portfolio of available experiences with a range of wellness offers based on the use of the special geo-thermal spa waters and the opportunity to engage in a wide range of sports and recreational activities in a clean environment. Dojran will have enhanced its position as an attractive lakeside resort, offering a wide range of resort services, recreational and cultural activities that appeal to travelers from Macedonia and the Balkans well beyond the summer season.</p> <p>In 2030, tourism in Strumica and surroundings will be renowned for offering the 'essence of rural Macedonia', with integrated packages that enable visitors to learn about the development of the farming industry, experience</p>



Regions per NSSD	NSSD definitions for eco-tourism basis, as defined by tourism experts	National Strategy for Rural Tourism Development	Defined Visions by 2030 for destinations by LRCP project
			traditional hospitality and cuisine, explore our cultural heritage, mountains and nature, and benefit from health giving spa waters. We will be offering these experiences to travelers from Macedonia, the Balkans and beyond.
Bregalnica	The mountain areas in the region are rich with healing and aromatic vegetation, which represent the basis for herbal tourist activities. The wooded area is one of the most attractive factors for staying in the locality Golak that is visited in the summer as well the winter period of the year.	The destination can offer: monasteries, eco-tourism, agri-tourism, chalets, local manifestations (St. Mother Mary cult), artificial lake, ethno-square, traditional handicrafts, gastronomy. Specific target groups: ethno and eco-tourism.	<b>Vision:</b> In 2030, Stip, Radovis and surroundings will be recognized within Macedonia and the Balkans for its expanding, prosperous tourism industry. Our destination will focus on rich cultural heritage, geo-thermal spas and outdoor recreational activities set within a clean, rural environment. We will welcome travelers from Macedonia, the Balkans and beyond.
Kratovo-Kriva Palanka	The bevel structure of the area is very interesting: in Kratovo there is a volcano crater that gives a special tourist value. The locality Kuklica is listed as a	The destination can offer: authentic ethno-villages, fisheries, monasteries, festivals, international art colonies, hunting tourism, forest walks, gastronomy.	<b>Vision:</b> In 2030, Kratovo - Kriva Palanka region will be recognized as Macedonia's 'air spa', a center for well-being, nature and healthy local food, where authenticity and tradition are celebrated. Our high-quality offer will attract year-round

Regions per NSSD	NSSD definitions for eco-tourism basis, as defined by tourism experts	National Strategy for Rural Tourism Development	Defined Visions by 2030 for destinations by LRCP project
	natural monument because it is an example for selective erosion. Harvesting wild strawberries, raspberries, blueberries, rose-hips and cornel trees are part of the rich possible activities of the visitors.	Specific target groups: hunting tourism.	travelers from Macedonia, the Balkans and beyond.

A destination that is identified only in the Local and Regional Competitiveness Project (LRCP), but deserves a specific reference, is the area centered around Berovo and Pehcevo. This destination therefore, includes tourism assets in these municipalities but also in smaller villages within a one hour driving distance. The attractions in these nearby areas are often visited during the same trip.

Its vision reads as follows: In 2030, Maleshevo will be recognized as Macedonia's 'air spa', a center for well-being, nature and healthy local food, where authenticity and tradition are celebrated. Our high-quality offer will attract year-round travelers from Macedonia, the Balkans and beyond.

#### 2.4.4. Key domestic actors

***The Agency for Promotion and Support of Tourism in the Republic of North Macedonia*** (APST) is an institution established by the Government of the Republic of North Macedonia. The main function of the Agency for Promotion and Support of Tourism is promoting tourism resources of the Republic of North Macedonia for foreign markets, as well as management and support of projects aimed at developing tourism

in general. APST was founded in 2008 under the *Law for establishing the Agency for Promotion and Support of Tourism in the Republic of North Macedonia* ("Official Gazette" No. 103/2008; 156/2010; 59/2012; 187/2013 и 41/2014).

The Agency has two sectors: the promotion sector and support ones. Within the promotion sector, the APST established remarkable web-site for promotion of the entire tourism possibilities in the country: [www.macedonia-timeless.com](http://www.macedonia-timeless.com)

The number of **specialized incoming tourism agencies** in North Macedonia has been increasing in the past 2 decades, especially stabilizing during the past 5 - 10 years period as response to the growing demand of foreign tourists for adventures, traditions, culture and gastronomy in the country. The **first National Association for incoming tourism of Macedonia (NAITM)** was established many years ago, aiming at getting a quality offer in tourism market, increasing the volume of quality tourism products and services, conjoining the forces of travel agencies dealing with incoming tourism in Macedonia, hotels, restaurants, wineries, transport companies, tour guides and other institutions involved in the tourism aspect of Macedonia. NAITM stands for the rights of tourism stakeholders from every sector of tourism and fights for change and renewal of the laws in tourism in Macedonia in order to obtain quality products and services and the regulation of work in every segment of the tourism. Currently it has 69 members ([www.naitm.org.mk](http://www.naitm.org.mk)). Later on, in 2016, **another National Association for Incoming Tourism of Macedonia (NAITAM)** was launched, as a legal form to bring together individual tourism workers, agencies and companies dealing with incoming tourism, with the main goal to contribute to revitalization, improvement of tourism, preservation of the tradition of domestic tourism, based on the values of the human, religious and national identity. This association has around 20 members ([www.naitam.org](http://www.naitam.org)).

Currently, but not solely limited to the activities listed, the following travel agencies have matured a strong establishment by offering “human-powered adventures”, “interaction and using the services of local micro suppliers in dominantly rural areas”, “belief that the people of Macedonia are the most important highlight of our trips, and they are the best possible guides to help You get the most authentic Macedonian Experience” or “staying with the locals at some points of the tour which contributes to their better living standard and prosperity, and to make the experience more authentic and memorable”:

[www.balkanprime.tours](http://www.balkanprime.tours)

[www.enjoybalkans.net](http://www.enjoybalkans.net)

[www.hikingthebalkans.com](http://www.hikingthebalkans.com)

[www.simoniumtravel.com.mk](http://www.simoniumtravel.com.mk)

[www.visitmacedonia.com.mk](http://www.visitmacedonia.com.mk)

[www.macedoniaexperience.com](http://www.macedoniaexperience.com)

[www.macedoniaholidaysandtours.com](http://www.macedoniaholidaysandtours.com)

[www.macedoniatravel.com](http://www.macedoniatravel.com)

[www.bademtour.com](http://www.bademtour.com)

Platform [www.kajak.mk](http://www.kajak.mk) is the first “**eco internet tourist agency**” that targets domestic tourists. It was developed in spring 2020 as a response to the crisis deriving from the Covid-19 pandemic, aiming to spread the word nationwide about the hidden and beautiful places and attractions in the country.

The mission of the **Association of tourist guides and companions** is to raise awareness about the promotion of the cultural heritage of the Republic of North Macedonia, both domestic and foreign, through human resources development. The profession of tour guides in the country has been practiced since 1978. This profession arises from the need of travel agencies to present to their traveling clients the characteristic features of the countries and cities visited and much more significantly from the needs of foreign guests visiting the country. Today, the Association is legally assigned to issue Tour Guide/Companion licences based on accredited certificates for appropriate examination at Faculties for tourism in the country. Up to this day, around 750 licences for Tour Guides have been issued.

Due to the growing demand for adventure tourism which especially includes hiking, trekking and biking, the national associations for those sports have undertaken processes, in the past 10-15 years for professional issuing of guide licences upon passing and examining certain training and education programmes. Thus, there are summer and winter mount guides, biking guides, paragliding pilots, etc. Some of these clubs’ web-sites are:

[www.fpsm.org.mk](http://www.fpsm.org.mk)

[www.cfm.org.mk](http://www.cfm.org.mk)

[www.paraglidingmacedonia.com](http://www.paraglidingmacedonia.com)

Last but not least, it shall be mentioned that besides the conservative studies on tourism and management carried out in many state and private Faculties in the country, there is a specific **studying programme** on Sustainable Tourism (120 ECTS) offered at the private

University for South-Eastern Europe in Tetovo: [www.seeu.edu.mk](http://www.seeu.edu.mk) . There are 3 vocational education high schools which offer 4-years formal education on rural tourism: in Kratovo, Ohrid and Makedonski Brod.

### 2.4.5. Offers

Every destination is characterized by its location and linkages to the transport hubs (railway, airports, highways), attractions, tourism assets (infrastructure, accommodation) and services<sup>64</sup>

Each of the identified destinations is visited by domestic and international tourists.

Domestic short break tourists are travelers who live in North Macedonia and who visit different resorts or holiday places for weekends, for short breaks during the week or around official holidays. This group includes Macedonians together with expatriates residing in the country. They stay in a variety of different accommodation types ranging from vacation homes to higher-end hotels, and travel by car. They are motivated by a change of scenery from their regular place of living, need for relaxation and spending time with friends and family. Frequently they travel with their family, and very often with groups of friends.

Regional short break tourists who visit North Macedonia for leisure purposes are staying for one or more nights. They book a package for one or two nights, usually staying in one single destination. These groups are very interested in local culture and foods. There is also a significant market of regional travelers who travel independently and book their hotel or rental home directly from the provider or through an OTA. The latter group seeks relaxation and enjoyment of good food in the company of friends and family.

Organized large group explorers are travelers who are part of a tour group (size ranging from 15-30 people) traveling around North Macedonia by coach bus. Many of the tour groups are from the Netherlands, however, Poland, UK and some other European countries are emerging source markets as well. Length of the tour varies between 7-12 days; shorter tours focus on the western region and longer tours also cover parts of

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<sup>64</sup> Tourism services can be defined as: visitor and regional information centres; exhibition, convention and amusement complexes; heritage, tourism and cultural centres; animal parks and aquariums; guided tours and other educational services for the benefit of tourists, visitors and the local community.

Eastern Macedonia. The focus of the tours is Macedonian culture and nature. Most these groups consist of travelers who are older than 50 years of age.

Organized active tourists are part of an organized tour group (size ranging from 5-25 people) traveling with a specialty operator around North Macedonia. Some of the tours combine Macedonia with neighbouring countries such as Greece and Bulgaria. These tours usually involve traveling by mini bus or bus, and may combine road transportation with hiking and/or biking. Length of the tour varies between 7-14days, shorter tours focus on the western region while longer tours also cover parts of Eastern Macedonia. The focus of the tours is Macedonian culture and nature through authentic experiences in off-the-beaten-track locations. Some of the tours are standard and others are tailor-made for specific interests. Most of these groups consist of travelers who are older than 50 years of age.

Independent active tourists (including domestic) are travelers from a variety of source countries (Europe, US/ Canada, region and domestic from North Macedonia itself) who travel to and within the country engaging in active outdoor exploration (hiking, biking) combining them with cultural and culinary experiences. The age bracket for this group of travelers is quite wide (could be between mid-20s and 30s to mid-50s). They tend to be independent in the planning of their stay (using online channels such as booking.com) in Macedonia and are usually in small groups (up to 4-5 people). While still in small numbers, there are independent travelers who travel around the destination. Hotels have reported individual bikers and hikers staying overnight. While most of the travelers within this segment originate from Western Europe, they do also come from North America. They are adventurous and attracted to new and less-conventional experiences. They are a leading market for many rural offerings.

## **2.4.6. The accommodation**

Responding to the increasing market and demand (as presented in Chapter 1.2, International and domestic demand), in a growing economy, the accommodation service providers show a synergic rise as well. Table 2 presents various statistical data in the tourism and catering sectors.

*Table 2: Data on tourism and catering sector in North Macedonia in the past 18 years (2000 – 2018)<sup>65</sup>*

Type of data	2000	2010	2015	2016	2017	2018	2019 <sup>66</sup>
No. of workers in the sector	10403	12250	14,874	15,209	15,665	16,985	14,381
No. of catering business units	1,798	1,914	2,084	2,212	2,260	2,301	1,275
No. of seats	129,959	115,309	131,230	130,069	136,502	137,749	105,813
No. of beds	73,759	69,102	72,021	73,168	74,257	76,558	76,942
Turnover in MKD (1,000) at current prices	5,298,252	7,352,408	10,338,132	10,836,358	12,190,404	15,167,429	14,294,853

Unfortunately, the State Statistical Office does not segregate data for **type** “ecotourism”, nor even for “rural tourism”, although the last one is recognized as a type of tourism in the legislation. As the Law on Tourism Services (see detailed analysis in Chapter V.2) defines various **categories** of accommodations, the State Statistical Office collects the data in this regard. For the purpose of this report, we will withdraw some conclusions from the official statistical data, but also some expert opinion regarding the eco-tourism offer in the country.

As presented in Table 3 below, according to the SSO, accommodation capacities in the country are quite low (only 247 total facilities in 2010). Despite the remarkable percentages of increase of number of tourists and overnight stays by 2019, the accommodation facilities remain almost the same: 274 in 2019. On the other hand, on the global internet platform for booking accommodation reservations, Booking.com, in December 2020, 814 accommodation facilities were offered in North Macedonia. Obviously, a major discrepancy is found in the “houses, vacation apartments and rooms for rent” which are basically facilities established and rented by physical persons. This leads to a conclusion that there is almost a double number of beds available and utilized

<sup>65</sup> Source: State Statistical Office, annual publications on tourism

<sup>66</sup> At the moment of elaborating this report, year 2019 is still not completed with figures from the private accommodation services. Thus, conclusions in further analysis do not consider year 2019 due to the possibility of misleading.

in the tourism accommodation sector, which are not registered according to the legislation, therefore falling under the “gray economy”. Recent financial experts’ opinion is that the total “gray economy” in the country takes a significant part of around 30 – 40 % on top of the total state budget incomes.

*Table 3: Types of accommodation facilities by SSO and Booking.com platform*


Type of accommodation as per SSO	2010	2019	12.2020 (type as per Booking.com)
All hotels	124	184	192
Boarding houses	2	1	15
Motels	9	9	10
Overnight lodging houses	10	16	6
Spas and sanatoriums	5	2	3
Workers' vacation facilities	24	16	0
Children and youth vacation facilities	15	10	24
Camps	8	9	2
Houses, vacation apartments and rooms for rent	2	7	562
Uncategorized accommodation establishments	48	20	0
Total	247	274	814

According to our expert opinion, only in recent 3 to 5 years, many small houses (e.g. guesthouse, villa, holiday home, B&B, country house, farm-stay, chalet) as family businesses started to grow throughout the country, offering their warm hospitality, usually accompanied with restoration services. Hard to say whether they offer ecotourism type of services, yet due to their relatively small size, significant use of natural construction and furnishing elements (wood, stones, ceramic tiles, etc.), low use of resources comparing to hotel type of facilities (packaging, information for guests, paper administration, etc.), lower energy consumption and especially organic food offer. It might be observed that most of them actually make the ecotourism offer in the country. Such accommodation and food offering are starting to be recognized as quite



good and a persistent source of income, resulting in a unique social benefit for the local population.

On Booking.com platform there are listed 5 “country houses” which are actually classical types of ecotourism accommodation and culinary offer:




Property Name	Rating	Reviews	Location
Riverside Villa Matka	9.9	6 reviews	9.2
Rancho i Vancho na Kata	9.8	37 reviews	9.7
Villa Dihovo	9.1	43 reviews	9.3
Melnicani, Breathtaking view B&B	7.8	35 reviews	8.5
Valavnica Shtrk	-	-	-

Room Type	Duration	Price	Includes
Deluxe Family Suite	1 night, 2 adults	€ 99	includes taxes and charges
Twin Room with Private Bathroom	1 night, 2 adults	€ 35	+€ 3 taxes and charges
Double Room with Bathroom	1 night, 2 adults	€ 41	includes taxes and charges
Family Room with Lake View	1 night, 2 adults	€ 24	includes taxes and charges
Double Room with Mountain View	1 night, 2 adults	€ 30	+€ 3 taxes and charges

There are also some small hostels, farm-stays and mount huts in rural areas, which may be considered as eco-tourism service providers from the same reasons, such as:



Property Name	Rating	Reviews	Location
Villa Serz	9.9	8 reviews	9.1
Kitka Hostel - Vratnica	9.7	35 reviews	9.7
Danica House	9.0	18 reviews	9.0
Kompleks Trnovski Vetar	8.8	18 reviews	8.4
Twins V.V.T Hostel	8.6	32 reviews	8.2

Room Type	Duration	Price	Includes
Holiday Home	1 night, 2 adults	€ 50	+€ 30 taxes and charges
Classic Quadruple Room	1 night, 2 adults	€ 55	includes taxes and charges
Two-Bedroom House	1 night, 2 adults	€ 50	includes taxes and charges
Double Room with Mountain View	1 night, 2 adults	€ 12	includes taxes and charges
Standard Double Room with Shared Bathroom	1 night, 2 adults	€ 23	includes taxes and charges

## 2.4.7. The tourist packages

Macedonia’s tourist resources are also present in its intangible traditions and human heritage. Macedonian rich gastronomy and wine making traditions, traditional music, cultural feasts and celebrations, all fed by different historic and cultural influences, form the multicultural identity of Macedonia, and represent an authentic tourist resource in themselves. Those natural and intangible resources are however very under-used, not well promoted and badly-known, even at national level. A shortage of specialization, resources interpretation and marketing offer seem to restrict Macedonian resources to tourist guides contents with very few easy possibilities to assess and enjoy them on site.

Despite the questionable accommodation services, the tourist packages including various activities combined with visits to rural areas which could be considered as eco-tourism offers, have slowly increased in the past 3 to 5 years.

A typical eco-tourism packages are now offered by **Genuine Experiences** [genuinexperiences.com](http://genuinexperiences.com), which is a smart tourism platform presented in early 2020 and developed with an EU IPA grant for cross-border cooperation. This business model is

quite similar to the Airbnb Experience platform service, and it offers authentic experiences in Macedonia and Albania cross-border regions, including Ohrid, Struga, Bitola, Debar (North Macedonia) and Peshkopi, Bulqize (Albania). They offer the perfect choice for responsible travelers who want to discover hidden parts of this region, usually not included in the regular tourist offer. As they promote tourism as a blend of human stories and exceptional destinations while taking care of nature, culture, and people, their users respect our traditions, cultural differences, environment, and are willing to indulge in local life. They offer experiences for tourists by visiting specific workshops provided by various local people: **arts & crafts, food & drink, nature & adventure, health & wellness and supporting the local causes**. It is probably the first fully advertised tourism business that promotes responsible and sustainable travel in North Macedonia.

Various tourist packages are promoted by the tour operators and travel agencies, such as nature and wildlife tours, wine tours.

#### Nature and Wildlife Tours:

- Private Full Day Trip to the National Park Mavrovo from Ohrid<sup>67</sup>
- Full day tour of Skopje and Matka canyon<sup>68</sup>
- Hiking Matka Canyon from Skopje<sup>69</sup>
- Roads of the old merchants - hiking tour from Ohrid<sup>70</sup>
- Hiking to Magaro peak from Ohrid<sup>71</sup>
- Go rural to Lazaropole and Gari from Ohrid<sup>72</sup>
- Bigorski Monastery and home-hosted lunch in Janche village from Skopje<sup>73</sup>

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<sup>67</sup> <https://www.viator.com/tours/Macedonia/Private-Full-Day-Trip-to-the-National-Park-Mavrovo-from-Ohrid/d21800-14832P29>

<sup>68</sup> <https://www.viator.com/tours/Skopje/Full-day-tour-of-Skopje-and-Matka-canyon/d26711-87479P39>

<sup>69</sup> <https://www.viator.com/tours/Skopje/Hiking-Matka-Canyon-from-Skopje/d26711-86663P64>

<sup>70</sup> <https://www.viator.com/tours/Ohrid/Roads-of-the-old-merchants-hiking-tour-from-Ohrid/d28588-86663P63>

<sup>71</sup> <https://www.viator.com/tours/Ohrid/Hiking-to-Magaro-peak-from-Ohrid/d28588-86663P62>

<sup>72</sup> <https://www.viator.com/tours/Ohrid/Go-rural-to-Lazaropole-and-Gari-from-Ohrid/d28588-86663P59>

<sup>73</sup> <https://www.viator.com/tours/Skopje/Bigorski-Monastery-and-home-hosted-lunch-in-Janche-village-from-Skopje/d26711-86663P57>

- Easy cycling tour from Kjafasan to Pogradec - departure from Ohrid<sup>74</sup>
- Mavrovo, Duf waterfall and Bigorski Monastery tour from Skopje<sup>75</sup>
- Etc.

Wine tours:

- Traditional wine and dine (visiting wineries KAMNIK, POPOVA KULA, STOBI)<sup>76</sup>
- Historical wine and dine (visiting wineries SOPOT, BOVIN, TIKVES)<sup>77</sup>
- Two-day wine tour (Visits in 7 Wineries, Wine Museum and Archaeological Site)<sup>78</sup>
- Three-day wine tour (Visits in 7 Wineries, Visits in Many Significant Places and Ohrid City)<sup>79</sup>
- Etc.

Some information on available offers in rural tourism is provided by Macedonia Rural Eco Tourism<sup>80</sup>, Experience Macedonian Vilages<sup>81</sup>

## 2.4.8. Gaps on Offers

When talking about the quality of overall touristic offer, the **Local and Regional Competitiveness Project** defined several gaps in all 10 destinations in North Macedonia, as presented below:

1. Gap between the quality of offered accommodation and the expectation of priority markets;

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<sup>74</sup> <https://www.viator.com/tours/Ohrid/Easy-cycling-tour-from-Kjafasan-to-Pogradec-departure-from-Ohrid/d28588-86663P37>

<sup>75</sup> <https://www.viator.com/tours/Skopje/Mavrovo-Duf-waterfall-and-Bigorski-Monastery-tour-from-Skopje/d26711-86663P34>

<sup>76</sup> <https://www.winetours.mk/traditional-wine-dine/>

<sup>77</sup> <https://www.winetours.mk/historical-wine-dine/>

<sup>78</sup> <https://www.winetours.mk/two-day-wine-tour-experience/>

<sup>79</sup> <https://www.winetours.mk/three-day-wine-tour-experience/>

<sup>80</sup> <https://travel2macedonia.com/tourism/rural-eco>

<sup>81</sup> <https://experience-macedonia.com/rural-tourism/>

2. Limited and uneven availability of food offerings geared towards the tastes and needs of the priority segments;
3. There are not enough products and attractions that are specifically geared towards the priority segments;
4. There is inconsistent and poor maintenance of sites and attractions, which negatively impacts the visitor experience;
5. There is a gap between the level of service offered and the expectation of priority markets;
6. There is a lack of adequate guiding capacity and skills to meet the expectations of both market segments;
7. There is limited online content for promotion and/ or information at the destination level. this affects the visitor experience in accessing timely information;
8. There is a lack of signage and roadside information necessary to guide priority market segments.

The legal section provides the legislative frame for ecotourism in North Macedonia with more details prior to the conclusion that overall, eco-tourism in 2020 is presented with relatively low range of formal offers. It is mainly driven by the demand of the international visitors seeking certain environmentally friendly services and/or nature conservation areas with traditional rural aspects.

### **2.4.9. Types of ecotourism**

In this chapter, three models of successful business in North Macedonia which have majority of characteristics as eco-tourism services, will be presented.

#### ***Agri-tourism and Farms***

Agri- tourism in North Macedonia is a novelty welcomed by both individual and group visitors. North Macedonia has potential in this area since it is a country offering diversity in types of farms. New group of attractive sites - the farms – were developed in the past 3 to 5 years, developed by pioneers and people starting non-standard migration, from towns to villages.

***Spirit of Prespa*** is a family orchard existing since 1960 in the Prespa area, which is traditionally popular for the best quality apple production; since recent years, many

other fruits have been introduced. At the start of 2017, the two young daughters of the family started to produce natural hand poured beeswax candles, as a prototype to introduce their brand to the public. Today, Spirit of Prespa orchard produces different varieties of apples, cherries, plums, nuts and other fruits and vegetables. On average, they produce 150 tons of apples, 2 tons of cherries, 2 tons of plums... They grow 8 varieties of apples; Each variety ripens at a different time of the season, allowing them to offer the tourist attraction “Pick Your Own” from late August through the end of October. In the farm, they also produce jams, juices and other fruit-based products, using a mix of traditional and modern methods. The orchard is 50,000 m<sup>2</sup>, allowing visitors to visit apple and cherry fruit production, taste traditional food & buy products from their farm shop. A visitor can also experience picking fruits and take them home. The logo of the family is “Spirit of Prespa is an adventure full of tradition and relaxation”.

Representing a real experience for the flavours of the body, Spirit of Prespa smartly responded to the growing demand for foreign tourists by offering 3 packages to touristic groups: 1,5 hour, 3 hours and 5-6 hours tours. In addition to relaxed walks through the orchard, these packages include a variety of apple-made food products degustation or gourmet lunches in the orchard. Accommodation services are not provided yet. The site is: <http://www.spiritofprespa.com/>

**Sheep farm Klepalo** is located in eastern North Macedonia, almost at the border with Bulgaria. The 12km hiking tours are already established starting from Berovo town (at 860 m.a.s.l.) up to the farm Klepalo (at 1400 m.a.s.l.). Organic food and gastronomical delights, fresh air, exotic and beautiful nature, oak and pine forest, meadows, water springs, and streams are creating an unforgettable experience for those who prefer quiet walks in nature. This region is known as Macedonian’s “little Switzerland”!



Walking on the colorful meadows visitors can taste different forest fruits, and gather many different herbs for preparing tea.

The walk finishes on the sheep farm Klepalo where traditional lunch is offered with eco – products from its surroundings. The farm has started to offer group lunches since 2015, supported by tourism development projects. The owners already realized the

financial benefits of this additional income possibility; they now even focus more on cooking time and widening the offer, than managing the farm.

This is a self-sustained farm, completely isolated higher in the mountain, yet, in the relatively close vicinity of the town Berovo. Access through an asphalted road is provided to a certain point, after which a light hiking is necessary. The farm and dining area is pretty simple, rather traditional: there is natural water supply, food is almost exclusively produced by the family maintaining the farm which also has hens and pigs. Wi-fi is not available, only low-quality mobile telecommunication. Accommodation services are not provided yet.

The site is: [www.hotelmanastir.com.mk/klepalo-sheep-farm](http://www.hotelmanastir.com.mk/klepalo-sheep-farm)

### ***Traditional old Villages***

Any village can be a tourist attraction, and most villagers are very hospitable across the Republic of North Macedonia. Local municipalities intend to promote the North Macedonian countryside for the purpose of attracting visitors, tourists and potential investors as one of the still unutilized ways of filling up their municipal budgets. The village, rural or eco-tourism has started developing as a factor of protection of the natural heritage, mainly concentrated in mountainous North Macedonian villages.

Very few travel agencies offer village tours. The municipalities say that alpinism, cycling, and a meal in the country, instead of a luxury hotel, is the real offer that the travel agencies could, in cooperation with the government, offer to the foreign tourists throughout the year.



***Village Brajcino*** is a real pioneer in ecotourism in North Macedonia. Lady Nikolina, born in Brajcino, after retiring, renovated the old house in the village and left Skopje in early '80s. She started renting rooms and offering guests food she cooked herself, according to her grandmother's recipes. This is how the story starts. Brajcino also offers walks and acquaintance with the

environment with professionally trained guides. The most attractive for foreign tourists is the six-hour walk to Golemo Ezero, in the center of Pelister National Park, at an altitude of 2,200 meters. From there you can visit several villages, such as Malovishte, Magarevo and Nizepole, which attract with their specifics. Due to the proximity to Lake

Prespa, for water and bird lovers, interesting destinations are the island of Golem Grad, the ornithological reserve Ezerani, as well as village Podmocani, where the museum with the largest collection of folk costumes is located. Old houses in Brajcino are built of stone, embedded in wooden frames, with exposed terraces, tiled roofs and various ancillary structures in yards, such as ovens, barns and similar.

The Association for Sustainable Development - Brajcino was established in 2003 as a result of the initiative for development of eco-tourism and the activities of the Project for preservation of Mount Pelister. Twenty local people have undergone training in strategic planning, project cycle management, food and accommodation price calculation training, guide training, English and computer courses. Despite significant international financial and technical support to boost eco-tourism, today Brajcino still stands at the basic starting level: accommodation in 4 families (total 23 beds) and in the monastery of St. Petka (10 beds), catering services (traditional dishes) offered by the same 5 families or in the monastery of St. Petka, 5 trained guides for trails around Brajcino and to Golemo Ezero, information boards, organized waste collection, promotion and information (flyers and brochures, book with stories about Brajcino, media promotions, map of the trails around Brajcino and to Golemo Ezero). Further development and tourism business growth was not evident in the past decade with obvious demand. Today, there is not even a single web-site available to reach out the potential market. Accommodations are also not available on Booking.com nor AirBnb as most used booking platforms in North Macedonia.

Unlike the example with injected financial support to local families for boosting eco-tourism, **Guesthouse Rancho i Vancho na Kata** is an individual initiative of a family from Skopje started in 2012, envisioning a zen place where one can achieve peace of mind. Located in the village Omorani, it is suited in the center of North



Macedonia, hidden from the main road by the surrounding hills. The river Babuna gives life to the picturesque slopes of Jakupica Mount with its peak Solunska Glava (2500 masl), which attracts many climbers to conquer the reef Nezhilovi Steni. The entire area has a 1000 years old history being the nest of the "Bogomil's Movement". Guests can re-live the authentic Macedonian rural experience by visiting some tobacco producing households, a goat farm or simply enjoying a certain rustic comfort, all at the same place

and time. The house has living and dining rooms with a fully equipped kitchen, 4 bedrooms each with a private bathroom with luxurious toiletries. The outdoor activities include a summer open kitchen with a barbecue, swimming pool and veranda for enjoyment. Luxurious dinner under the stars is already marked by reviews as a “must-to-do” thing. The logo of the guesthouse is “We provide you the chance to experience the rural lifestyle throughout various life-changing activities. Just enjoy the luxury of rural simplicity and peace of mind”. The site is: [www.ruraltourism.mk](http://www.ruraltourism.mk)

### ***Adventures in the Nature***

**Hostel Kitka** is located in Vratnica, northern part of Macedonia at the footsteps of Shar Mountain. It is a beautiful, peaceful and clean village with a magnificent view on the Ljuboten peak and fresh air. Kitka Hostel - Vratnica features a garden, BBQ facilities and terrace. Among the facilities of this property are a restaurant, a shared kitchen and a shared lounge, along with WiFi. The



owner is a young man who opened the first rooms to tourists in 2017, and has already increased the number of outdoor activities and possibilities. The delicious food menu is always available due to increasingly constant presence of guests and requirements for traditional dishes. Domestic alcoholic beverages such as rakija and wine are also completely produced by the owner. A continental breakfast is available daily at the accommodation. Currently, the hostel has 20 beds, and plan for further investments is already on the table.

The facility does not have web-site, only a FB fun page: [www.facebook.com/Hostel-Kitka-Vratnica-1836512099962416/?ref=page\\_internal](https://www.facebook.com/Hostel-Kitka-Vratnica-1836512099962416/?ref=page_internal)

## **2.4.10. Best practices**

### ***Farm-Tourism and Village tourism***

Currently information on the state of development of rural tourism activities in single farms/properties is unavailable, whereas some indications are provided at village level. A number of rural villages have been interested, in the last 5/7 years, by pilot research works/projects mostly funded by foreign donors (e.g. USAID, GTZ, Swiss Aid, Dutch Aid, UNDP, World Bank, SIDA, etc).(elaborated in Annex 13) These projects have addressed



mainly the Southern (Ohrid and Prespa lakes) and Eastern (Berovo) parts of the country. The majority of these projects were focused on institution building and on the definition of strategies/plans, and did not include monitoring of the actual development of new business activities (including rural tourism ones). Moreover, some villages have already been included in tour operators programs, and others are displayed on the official Exploring Macedonia and Go Macedonia web sites. In addition, the Tourism Department of the MoE started in 2007, a project aimed at assessing the development potential of some rural villages for developing tourist activities, however it is at a preliminary stage. From the preliminary results of a recent survey, it appears that many NGOs in the country are involved in the organization of activities affecting both the rural environment and rural tourism (usually eco-tourism). In the case of farm/village tourism, visitors mainly arrive from Holland, Germany and the US. Foreign investment is for the moment very low but interest has been shown by Holland (for a number of localities), USA (for a number of localities), Swiss, Portugal (Prespa lake), Finland (Mariovo area), Italy (Ohrid and Prespa area). The number of tourist agencies including visits and/or activities in villages can be reasonably estimated in 5/10, mainly based in Skopje and Bitola.

### ***Wine tourism***

Because of the climate and natural eco-characteristics, the country produces some high-quality wines and production tends to be concentrated in a few areas. The sector has been increasing its dimension in the last 3-4 years. Unfortunately, the country's vineyards are not treasured at all and they are not fully included in the country's tourism profile. The main reason is that many wineries are still not developed to offer tourist product. Until a few years ago, their primary goal was to invest in the modernization of the production infrastructure, new technologies and equipment, in order to replace the production of bulk wine and offer to the market high quality bottled wine. It is a fact that there is no quality tourism without a wide selection of excellent local wines or without beautiful vineyard landscapes, but the development of wine tourism is also closely related to modern accommodation, tasting facilities as well as with a sustainable marketing strategy. The wine areas in the country are concentrated in three regions situated mostly along E-75- Corridor X, where there is a big fluctuation of transit tourists. It is crucial to integrate these potentials and advantages of wine tourism in the entire tourist offer of the country. As for the weaknesses, there is no detailed analysis of the potentials of wine tourism; there is a lack of accommodation facilities, lack of government initiative and not sufficient marketing and promotion. During the last few

years, the number of new private wineries (mainly small and medium-sized plants) has considerably grown from 28 in 2003 to 50 in 2007, and some of them are starting to adapt and diversify their activities in the direction of wine tourism. A few of them are in the process of preparing accommodation facilities and around 10 wineries have wine tasting facilities. In December 2005, an association named “MakVino” has been created (with the assistance of Wine Cluster Project of the USAID) with the aim to organise the wine processing industry, promote the country's wines and assist in defining a wine strategy. So far, this association gathered 11 companies out of the 50 registered. The Tikvesh Wine Route Foundation was founded by 4 municipalities (Kavadarci, Negotino, Demir kapija and Rosoman) and two wineries, and officially established on the 29/11/2006, it now has 11 member wineries in the Kavadarci-Negotino area, the support of Association of MAKVINO (wine producers), of three NGOs from Negotino and three Mountain Associations. The goal of the Foundation is to gather all stakeholders from the region and provide a basis for continued development of attractive tourism products and promoting the region as an attractive tourism destination. The Foundation is currently working on a project for creating a new tourism product for valorisation of the potentials of the region for wine, agri, winter, hunting and fishery tourism. The Foundation has so far promoted awareness on wine tourism at regional level, and contributed to institutional building, providing also services (e.g. educational tours in Italy). In addition, other wineries are already independently attracting a remarkable number of tourists in their cellars, and plan to be able to further enlarge their activity, adding restaurants and rooms, by the end of 2007. Smaller wineries tend to show the same plans, but do not appear to have proper funding. Another large winery interestingly stated that it is considering setting-up a sort of Wine Academy in the area, in order to create a wine-archive and organize specialised training workshops. In the case of Wine Tourism, visitors mainly arrive from neighbouring countries, plus some from Czech Republic, and also from Germany and Israel. A market for wine-tourism in the Tikvesh area appears to have been already started (all the visited wineries had established links with more than one tourist agency), although some problems do persist (quality of facilities, limited incoming service, limited number of groups arriving/year, lack of promotional materials such as map of wineries offering tasting/catering opportunities, etc).

### ***Nature exploration activities***

Hotel Manastir in Berovo opened in 2007 and currently has 30 rooms. The hotel caters mostly to tour groups and the domestic market and has a small spa in the hotel building.

It offers excursion packages to attractions in the region: visiting sheep farm, jeep safari, wine testing at Delfina wineries, Pehchevo waterfalls and visit of the monasteries St. Archangel Michail and St. Bogorodica. The excursion to sheep farm Klepalo is the most popular product. The hotel offers packages combining an overnight stay in the hotel with lunch at the sheep farm, which is advertised by the currently most used Bulgarian tour-operators as “Oxygen weekend in Berovo”. The hotel reception provides printed maps with five marked trails in the nature; they also provide connection with the local hiking licensed guides. Another Hotel & Winery Popova Kula is in Demir Kapija. The hotel has 33 rooms, built in chateau style as part of the vineyard and winery. The hotel has developed 15 tourist activities, ranging from cooking and traditional dance to hiking, biking and rock climbing. The tours are organized by local guides and operators. One of the rare nature exploration tours available in the country is offered by Popova Kula hotel: bird watching in the nearby canyon conducted by cycling or walking in nature along the vineyards.

## 2.4.11. Legal scope

### ***Law on Tourism***

The Law on tourism (Official Gazette of RNM No. 62/04) defines the key terms and concept for different types of tourism, including eco-tourism. In this desk-research report, we use the terms as defined in the national legislation, which has been harmonized with relevant EU legislation. Thus, the term “tourist region” is defined as: *geographic and functional spatial surface which includes several touristic sites sharing the same name which natural and created touristic values characterize a basis for establishing an independent tourist offer, thus representing the possibility for development of tourist arrangements by the travel agencies.* The term “tourist site” is defined as: *area or destination which organizational and functional totality possess natural, cultural, historical and other attractions important for tourism, communal, traffic and tourist infrastructure, as well as facilities and other content for accommodation and stay of the tourists.*

Eco-tourism is recognized only in Article 51 of this Law, which stipulates the types of tourist services and service providers in **rural**, **ethno** and **eco-tourism**. Despite the title of this article is focused on three types of tourism, in Article 2 which provides definitions for key terms of the Law, there is a definition only for rural and ethno tourism: “Services

in rural and ethno tourism" *are the stay of tourists in rural households for the purpose of rest and recreation.*

Nevertheless, the Article 51 defines the following stipulations:

- Under the services in ecological tourism, this law considers a stay in areas with special natural features, as well as in protected areas for the purpose of rest, recreation and sightseeing of natural beauties in a way determined by law.
- In this regard, the tourist services mean renting of vehicles for sightseeing, sale of products of the nature, giving an explanation about the natural beauties, photo-safaris and other services which do not cause harm to the nature in a manner determined by special law.
- These tourist services can be provided by a physical person who is registered with the Mayor of the municipality, and in the City of Skopje at the Mayor of the municipality in the area of the City of Skopje. The provision of these services is done through mediation of the providers of tourist and catering activity, on the basis of contract.

There are 2 weakness of stipulations of this Article 51 related to eco-tourism:

- It is not clear how an interested physical person can be registered with the Mayor of the municipality for providing of eco-tourism services, e.g. what should be the level of education, what specific skills the person should possess and finally what is the procedure to be implemented for one's registration. Thus, so far, there is no any official data that a single physical person has been registered for offering of eco-tourism services.
- The types of eco-tourism services are actually very limited to renting of vehicles for sightseeing, sale of natural products and acting as a nature "guide". Many other basic services are missing, such as accommodation and food preparation.

Obviously, if the country promotes its natural values and traditions as eco-tourism, more in-depth definitions are needed, aiming to ensure a proper and motivating legal framework for eco-tourism.

### ***Law on Hospitality Services***

The Law on tourism services (Official Gazette of RNM No. 62/04) stipulates in detail the standards for providing various accommodation and catering services by few types of identified providers. Despite one Article (no. 53) which provides key definition,

minimum standards and limitations for “rural household” services, if this one can be considered as eco-tourism type, there is no any reference to eco-tourism.

In general, this Law offers the possibility for service providers to act as legal entities or as physical persons, thus providing stimulations for rural and less developed areas to start small tourism businesses.

Article 16 defines that legal entities may provide services for (1) accommodation and (2) catering/food preparation.

Furthermore, Article 18 stipulates the following types of accommodation services by the legal entities:

- Basic accommodation facilities: hotels, hotel settlements, apartment settlements, motels, pensions, residencies, tourist settlements, etc.
- Complementary accommodation facilities: overnight stays, inns, camps, private accommodation capacities (rooms, apartments, flats, houses), vacation homes (for children, youth, workers, persons with disabilities, etc.), other complementary facilities (scout domes, mount huts, temporary accommodation facilities, etc.).

Article 19 stipulates the following types of catering/food preparation services by the legal entities:

- Restaurants (restaurants, inns, self-service restaurants, express restaurants, kiosks, milk restaurants, open garden restaurants, summer garden restaurants, kebab- restaurants, bistro, pizzeria, fast food restaurants, etc.),
- Bars (cafeteria, night bar, cafe bar, cabaret, disco club, disco club on open space, brewery, etc.),
- Canteens, and
- Other catering facilities for food preparation.

Article 40 defines the following types of services that can be provided by physical persons: confectionary catering services in mobile facilities, camping services, accommodation and catering in houses, apartments and vacation rooms, rural households and floating facilities.

Again, there is no other categorization of types of tourism services, such as ecotourism.

As for all the services which are envisaged in this legal framework, there are complementary by-laws which regulate the specific details for quality standards as well as limitations for the size of each and every type of service.

It can be concluded that, in the current legal framework a proper and specific definition for ecotourism is missing. Main advocates of environmentally friendly tourism, that recognizes the natural values and promotes nature conservation are the incoming adventure tourism tour-operators and travel agencies as well as mount guides and similar adventure tourism specialists who are basically responding to the growing global demand for sustainably responsible tourism. In this respect, they try to implement the eco-tourism standards on a voluntary basis aiming to respond to the requests of their target groups.

### ***Rulebook on Eco Labeling***

Aiming to promote environmentally friendly businesses (services and products) as stipulated in the Law on Environment (Official Gazette of RNM No. 53/05), the Ministry of Environment and Physical Planning endorsed a *Rulebook on the form and content of the eco-label, the rules, terms and procedure for its awarding and implementation, as well as the content and rules for the establishment and work of the committee for eco-labeling*, in 2005 (Official Gazette of RNM No. 53/05), based on the Law on Environment (Official Gazette of RNM No. 109/05). The eco-label can be awarded to a product or a service which possess characteristics that can contribute for significant improvement of the environment, by fulfilling the requirements presented in environmental criteria. Interestingly, the Rulebook proposes the committee for eco-labeling to define the criteria for assessing and furthermore, awarding the eco-label.

Environmental criteria for awarding the eco-label in the tourism sector, more specifically for accommodation facilities have been prescribed only 3 years later, with another *Rulebook on criteria which shall be fulfilled for awarding eco-label to tourist accommodation facilities* (Official Gazette of RNM No. 2/09). However, so far, such eco-label was not awarded at all.

This Rulebook prescribes in detail very strict environmental criteria, basically in two categories: mandatory and additional:

Mandatory criteria are:

- energy supply and efficient energy use specified by each single source and need,
- water supply and efficient use specified by sources of water use and wastewater treatment,
- detergents and disinfectants use,
- waste management specified by sources, minimization, separation, collection and transportation,

- other services such as smoking areas and public transportation
- general management such as EMAS or ISO 14001 certification, maintenance, training of the personnel, information for the guests, energy and water consumption data, etc.

**Additional criteria** are selected by the service provider and they shall make a total sum of minimum 16.5 points as presented in Annex 2 of the Rulebook:

- Energy supply, renewables and efficiency,
- Water supply and sources, efficient use and savings,
- Hazardous chemicals use
- Waste management, such as composting, packaging, kitchen oils separation and procedure for used materials and furniture,
- Other services, such as information for guest, non-smoking areas, availability of bicycle rent, local food supply, etc.,
- General management: EMAS or ISO:14001 certification and various ecological actions.

Overall, with the Rulebooks on eco-labeling, the country provided some legal basis for eco-tourism services, particularly in accommodation facilities, but it is actually a voluntary decision by the management of the service provider whether they would like to formally obtain an eco-tourism label.

There is a lack of other basic legislation for regulating the eco-tourism possibilities: destinations, services (tours, restaurants, activities).

### ***Financial incentives***

Key financial instrument to support private investments in rural tourism sectors is the available ***Instrument for Pre-Accession for Rural Development (IPARD)***. The main general objective of the country's IPARD Programme is to: "Improve the competitiveness of agricultural holdings and the food industry developing them to comply with Community standards, while ensuring sustainable environmental and socio-economic development of rural areas through increased economic activities and employment opportunities."

The IPARD Programme started to be implemented after the conferral of management of aid was granted by the Commission to the IPARD structure via Commission Decision No. C2009/987/EU on the 18.12.2009 for three measures M 101, M 103 and M 302. The IPARD funds are managed through the accredited Agency for financial support of

agriculture and rural development ([www.ipardpa.gov.mk](http://www.ipardpa.gov.mk) ). The results from the implementation of the First IPARD Programme as of 30.06.2014 showed that grant funds were not paid for the Measure 302 (Farm diversification and business development), which targets the rural tourism as well. Throughout the First IPARD Programme implementation, the rejection rate was around 65% reflecting a very low absorption rate (around 5% of the available funds are paid to beneficiaries).

For the Second IPARD Programme (2014 – 2020) for the Measure 302, Farm diversification and business development, an amount of 15.650.000,00 EURO was planned, with contribution of 75% by IPARD.

The Government of North Macedonia also plans a significant portion of the **public budget for support of rural development**, which implementation is undertaken by the same Agency. In November 2020, the Government made a decision to double the available annual budget for rural development as a mitigation response to negative impacts of Covid-19 pandemic, to 26,807,810.00 EURO.

In 2011 the government started a **subsidy program for Macedonian tour operators and travel agencies** to increase the competitiveness of the offered Macedonian holiday packages and, as a consequence, to increase the demand for leisure holidays in the country. In 2015 around MKD 91 million (approximately EUR 1,5 million) were allocated in the budget of the Agency for Promotion and Support for tour operator subsidies. Subsidies are only granted if certain predefined conditions are fulfilled by the holiday package: e.g. minimum stay of three nights with breakfast at an accommodation facility with professional services. Subsidies are granted for bus transportation, air transfer, charter transport, railway transport, combined transport and tour trips.

In the absence of a national airline, the Government is subsidizing flight connections to Skopje and Ohrid. There is financial support provided to low cost airlines introducing new flights: a lump sum of EUR 40.000 for each new destination launched and an additional EUR 13 for each departing passenger in the first year of operations, EUR 12 in the second and EUR 11 in the third year of operations.



## 2.4.12. Results of interviews in North Macedonia

Data collection was made by communication and questionnaires of the subjects directly involved in tourism. The goal was to make a brief analysis of the practice with ecotourism in N. Macedonia. For that purpose, 9 entities were interviewed:

### **4 companies dealing with agritourism (recognizing themselves also under ecotourism)**

- a. Villa Dihovo, Dihovo Village, National Park “Pelister”, near city Bitola
- b. Rural Guesthouse “Rancho i Vancho na Kata”, Omorani Village, near city Veles
- c. Kitka Hostel, Vratnica Village, Jegunovce municipality, near city Tetovo
- d. Popova Kula Vinery, near Demir Kapija

### **3 companies dealing with Destination Management (DMC)**

- a. Simonium Travel, Skopje
- b. HFR Tours, Ohrid
- c. Popova Kula Vinery, near Demir Kapija

### **1 National Park**

- a. NP “Mavrovo”

### **2 Institutions**

- a. Ministry for Economy, Sector for Tourism
- b. Agency for Promotion and Support of Tourism.

The interviews were held in the period 14-20<sup>th</sup> December 2020 with direct contacts.

### **Concerning companies dealing with AGRITOURISM, the results are the following:**

- All 4 companies work in rural areas, in different parts of N. Macedonia. They are in quiet surroundings, in beautiful nature, by the rivers and not very far from the

roads. All of them have their own farm production and offer it to the guests. Beside gastronomy, they offer also trips around in nature.

- The capacity of the agritourism is analyzed segregated – 3 typical small entities and 1 much bigger, the winery. They vary from 4 to 6 rooms (winery 33 rooms) and from 6 to 19 beds (winery 90 beds). In 2019 they had between 100 and 800 guests (winery 7.800 guests), with bednights between 200 and 1.600 (winery 7.800). The numbers show that most of the guests stay 2 days (in winery 1 day).
- The peak of activity is in summer, mainly from June to September (winery September particularly).
- Three of the companies are owned by men and one, b), by a woman, at the age from 35 to 52. The owners are well educated: 2 have graduated school, 1 MS degree, 1 high education.
- The owners consider their company as an ecotourism company, because of these practices: producing their own organic food and beverages, traditional housing, outdoor activities in nature, solar energy for hot water, composting waste from kitchen and garden, dripping irrigation system for the garden, soaps purchased from a small local company, local food from local people in the village (milk, cheese, vegetables, wine, honey), recycling waste, membership in Slow food.
- The usual activities of the customers in all the places are: hiking, trekking, biking, mountain biking, wildlife watching, rural tourism, local gastronomy trips and exploration of nature. In some of them horse riding, fishing and cultural round trips are offered. In two places, a) and c), there is also apitourism with local production of honey. In the winery d), there is a wider offer with wine tourism, rock climbing, lavender fields photo shooting, kayaking and swimming in the local warm pools in the near river. Nowhere is offered caving.
- According the interviewed owners, the most suitable areas for ecotourism in Macedonia are: villages and mountains in the national parks (Pelister, Mavrovo, Galichica), Prespa Lake area, Ohrid Lake area, Berovo, Demir Kapija (Tikvesh wine region), Azot villages, Belasica villages, Shara Mountain villages, Krushevo, Osogovo mountains.
- The evaluation of their own business before COVID-19 was 3, except one a), in the national Park Pelister, which was 5. The explanation of the last one was successful work for years and awards: by Lonely Planet 2018 among 50 most

beautiful hidden destinations in Europe and among 5 top food destinations in Macedonia; by Olivemagazine 2018 among 5 hidden the most tasteful destinations in the world. The explanation of the winery d), is that they work only 6 months per year, and the others are quite satisfied, and are in progress, working mainly with foreigners. The COVID stopped that.

- In collaboration with other tourism companies, all of them say that they have no problems in accommodation, local transport and complementary services. But two, b) and d), declares problems with promotion and quality of personnel (in rural areas because of the mentality and do not want to stay to live there if they are well skilled). Other individual specific problems are: a) waste water system, b) domestic tour-operators (not realistic with prices), d) no access to long term financing (winery).
- The plans in the next two years are different: a) to develop furthermore slow food practice, to improve the environment; b) to open a mini-brewery with some homemade foods for degustation, to build more accommodation units; c) to solve the problem with recycling waste 100%, to build apichamber for apitherapy; d) nothing without long term financing.
- Training as a way for overcoming the problems and reaching a new goal is accepted for three of them: a) to learn more about eco cooking with exchange with other families from other countries, c) to gain new skills and learn new practices, d) to train chefs and waiters.
- The online training is acceptable for all the people in the time of pandemic, but they all prefer learning on the spot. The owner b) proposes in-person educational sessions for the village people, like 1-2 weeks training programme.
- About experience in training, all of them have had a lot of training and have some good practice to share. For a) was learning English, also for tourism in depth; for b) was agriculture high school in rural Slovenia, learning about farming, bakery, cheese and meat production; for c) was training for rural tourism in 2019; for d) was learning better online promotion in 2020.
- About training in their company, three of them have done that. In a) a lot of different training and teaching by the owners about cooking, making wine, beer, honey; in b) also, without specification; in d) online promotion on social media and platforms.

## Concerning companies dealing with DESTINATION MANAGEMENT (DMC):

- The 3 interviewed companies work in different places – Skopje, Ohrid and Demir Kapija (rural area). The two of them, a) and b) work only in this field, while the c) is also an agritourism company itself. Two of them, a) and c), offer agritourism to the guests, with gastronomy and trips around in nature. One company, b) doesn't provide ecotourism products.
- The capacity of the companies vary from 3.100 a), 7.800 c) to 30.000 b) in 2019. The clients are mostly from foreign countries, 65% (Serbia, Holland, Romania) in c); 90% (Turkey, Philippines, Indonesia) in b); 100% (Spain, England, Finland) in a).
- In the peak season, usually in summer, the companies have 8 employees in b), 14 in a) and 60 in c).
- All three companies are owned by men, at the age from 35, 40, to 50. The owners have with different education levels: undergraduate school, graduate school, 1 MS degree.
- The preferred activities of the foreign customers among ecotourism products are: hiking, trekking, biking, mountain biking, wildlife watching, rural tourism, caving, local gastronomy trips and exploration of nature, but also wine tourism for c).
- The preferred activities of the domestic customers that are ecotourism products are: hiking, trekking, biking, mountain biking, wildlife watching, rural tourism, caving, ski cross country, but also wine tourism and gastronomy for c).
- According the interviewed owners, the most suitable areas for ecotourism in Macedonia are: Dihovo and Magarevo villages in the national park Pelister, Galichnik and Jance villages in the national park Mavrovo, Brajcino village by the Prespa Lake, Elshani, Kuratica, Vevchani and Gorno Konjsko villages by the Ohrid Lake, Berovo, Demir Kapija (Tikvesh wine region), Krushevo, Babino village near Demir Hisar, Osogovo mountains, Pehchevo.
- The evaluation of their own business in ecotourism before COVID-19 was 2 for a) and 5 for c).

- In collaboration with other tourism companies little problems were mentioned in accommodation, while this was the case for local transport and services. The biggest problem is promotion and quality of personnel (to keep them in rural areas).
- Training as a way for overcoming the problems is accepted.
- The online training is acceptable, but for the managers. They prefer learning on spot. The owner a) proposes in person educational sessions with study visits in more developed ecotourism destinations, while c) proposes training for the general population in the village, beside training of waiters and chefs.

### **Concerning NATIONAL PARK:**

- The answers were given by the director, male, age 48, with a graduate degree.
- The National Park “Mavrovo” is in the western part of Macedonia, in the municipality Mavrovo-Rostushe and a small part in municipality Gostivar. It is 722 square kilometers wide; the main river is Radika, there is an artificial lake Mavrovo with a lot of private villas.
- The number of accommodation units based in the park is: 12 hotels, 1 resort, 2 villas, 5 apartments, 2 ethno-houses.
- The number of Park institution employees is 56.
- The interviewed director of the Park holds a graduate degree.
- The ecotourism activities mainly carried out in the park are: hiking, trekking, biking, mount biking, horse riding, wildlife watching, fishing, rural tourism, caving and ski cross country.
- All mentioned ecotourism products are interesting for domestic and foreign tourists, both.
- The objectives of the park with regard to ecotourism are: promotion of the tourist destinations offered by the park, traditional food and traditional architecture; raising awareness of ecotourism; attracting more foreign tourists.
- The park is planning to work in ecotourism in the next 2 years in these directions: to apply for development of mobile application, where the visitors will be registered and be charged a symbolic amount for a ticket; lately they had finished a project for rural women in promoting ecotourism, with a support of UNDP.

- There is an info center in the park, which is visited usually by the tourists, for the information and their safety.
- The park has cooperation with many companies working on ecotourism.
- The park has its own budget.
- The park is opened for training in capacity building, and also in training the people to open their own businesses, and for involvement of rural women in ecotourism.
- The online training is accepted in the period of COVID-19.
- They have experience in being trained for capacity building and modern technologies.

## Concerning PUBLIC INSTITUTIONS:

### a) Ministry for Economy, Sector for Tourism:

- The answers were given by the head of the Sector for Tourism, male, age 39, with graduate school.
- The main goals of the institution are:  
*“To promote the development of the tourist sector - The Republic of North Macedonia has established its image as an important European destination for tourism based on cultural and natural heritage, and will be recognized for its environmentally sensitive and sustainable, high quality products and services developed in accordance with global best practices. Macedonia’s tourism product is a rich combination of cultural and natural heritage which is characterized by a largely pristine landscape of lakes and mountains. The main responsibilities of the Ministry of Economy and Agency for Promotion and Support of Tourism are professional presentation of all segments and regions of the tourist offer; preparation and implementation of strategies for promotion and development of tourism; preparation of programs for development of the entire and of separate kinds of tourism in the country; provision of informative material for promotion of tourism assets (printed publications, audio and video materials, internet presentations, souvenirs etc.)*

*To support the tourism supply - The support is implemented through the preparation of programs for the development of the whole and of certain types of tourism in the country.*

*To strengthen the tourist products* - Promotional campaigns are proposed through the annual programs; strengthening the tourism sector of the Ministry of Economy; targeting hotel management companies and international tour operators and travel agencies; promoting rural, cultural, heritage, wine and spa tourism.”

- The main goals of the institution towards ecotourism are: “Eco tourism is a modern form of tourism alternative. It arises from man's essential need to return to nature. The Ministry of Economy supports all activities aimed at preserving the historical and cultural heritage, numerous archeological sites and ecologically clean landscapes, development of rural tourism, rich national cuisine and wine make it an attractive destination that offers good food and beautiful, untouched nature.”
- Available budget for tourism 2019: 36.000.000 denars (585.000 euro).
- Available budget for ecotourism 2019: 6.000.000 denars (98.000 euro).
- The ecotourism activities are: hiking, trekking, biking, mount biking, horse riding, wildlife watching, fishing, rural tourism, caving and ski cross country.
- The most suitable for ecotourism are: national parks, mountains, lakes, rivers.
- The preferred ecotourism products of the foreign tourists are: hiking, biking, mountain biking, fishing, rural tourism, caving, ski cross country.
- The preferred ecotourism products of the domestic customers are: hiking, biking, mountain biking, wildlife watching, fishing, rural tourism, caving, ski cross country.
- There are problems in ecotourism in all mentioned areas: accommodation, local transport, complementary services, promotion, quality of personnel.
- The questions under the training possibilities and experience are not answered.

**b) Agency for Promotion and Support of Tourism**

- The answers were given by the director of the Agency, male, age 48, with doctorate.
- The main goals of the institution are:
  - To promote the development of the tourist sector;
  - To support the tourism supply;
  - To strengthen the tourist products .
- Available budget for tourism 2019: 162.132.000 denars (2.636.000 euro).
- Available budget for ecotourism 2019: 15.000.000 denars (244.000 euro).

- The most suitable areas for ecotourism in Macedonia are: national parks (Mavrovo, Galichica and Pelister), canyon Matka, Dojran Lake, Prespa Lake, village Jance.
- The preferred ecotourism products of the foreign tourists are: hiking, trekking, biking, mountain biking, wildlife watching, fishing, rural tourism, caving.
- The preferred ecotourism products of the domestic tourists are: hiking, trekking, biking, mountain biking, fishing, rural tourism, caving, ski cross country.
- The Agency is dealing with all types of ecotourism products, except wildlife watching.
- There are problems in ecotourism in almost all mentioned areas: local transport, complementary services, promotion, quality of personnel, except in accommodation.
- In the next 2 years the Agency is planning to work on: biking, mountain biking, sport climbing.
- The Agency considers that training would be helpful for local personnel and accommodation.
- The director has been part of training.
- The training has not been done in the institution.



## 2.5. Ecotourism in SLOVENIA

### 2.5.1. General Overview

Slovenia has an area of 20,273 sq km with 2.081 million inhabitants (2019). Tourism produces 9.9% of GDP and employs 65.7 thousand workers of which 35.9 thousand in direct activities. The travel and vacation sector is therefore an important component of the country's economic structure.

In 2019 (pre COVID), 6.2 million tourists spent holidays in the country, of which 24.5% were domestic and 75.4% foreign for a total of 15.8 million overnight stays. The tourism demand in the country has grown by 42% since 2015.

The Slovenian territory, according to the tourist products offered, is divided into six homogeneous areas (see Fig. 1), the three main ones are the mountains (Alpska Slovenija), 29% of overnight stays, the area of thermal resorts (Termalna Panonska Slovenija) 22% of overnight stays and, third in the ranking, the coast (Meditranska Slovenija), 19% of overnight stays (See Tab 2).

Fig. 1. Breakdown of the Slovenian territory by homogeneous tourist products. The names of the divisions are self-explanatory



Source: Statistical Office of the Republic of Slovenia

Between 2015 and 2019 the mountains overtook the spa area in first place (+1.2 million overnight stays).

*Tab.1 Distribution of overnight stays by homogeneous tourist regions*

	2015	%	2019	%
SLOVENIA	11.653.764	100%	15.775.331	100%
Mountain resorts	2.982.084	26%	4.636.031	29%
Health (spa) resorts	3.199.045	27%	3.445.019	22%
Seaside resorts	2.405.343	21%	3.016.067	19%
Ljubljana, the capital	1.373.436	12%	2.227.669	14%
Other municipalities	874.643	8%	1.406.651	9%
Urban municipalities	819.212	7%	1.043.894	7%

Source: Statistical Office of the Republic of Slovenia

Between 2015 and 2018 tourists mainly used hotels (49%), campsites (12%) and private homes (23%) (see tab. 1).

Some types of accommodation facilities have not kept pace with the growth rate of the country: in this regard, the gap of hotels growth is impressive, whose supply has grown less than half (+ 16%) of the national figure, while on the contrary the offer of private houses literally exploded (+ 106%).

The data presented can be interpreted in positive terms, indicating a wider social participation in the tourism industry. It also underlines that investments instead of heading towards business structures, such as hotels, have been pulverized into a thousand small properties whose impact on the territory it tends to be more negative than positive.

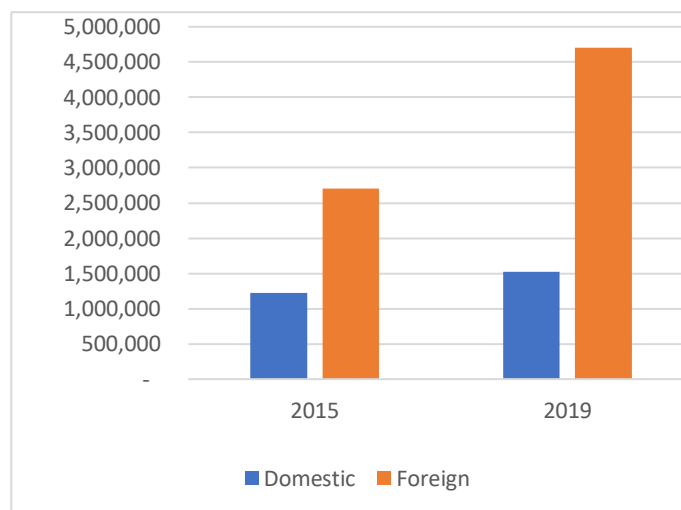
## **2.5.2. The tourist demand**

Table 1 not only shows the distribution of tourist demand among the different types of accommodation facilities, it also highlights the great growth in the number of visitors which occurred in the period 2015 - 2019.

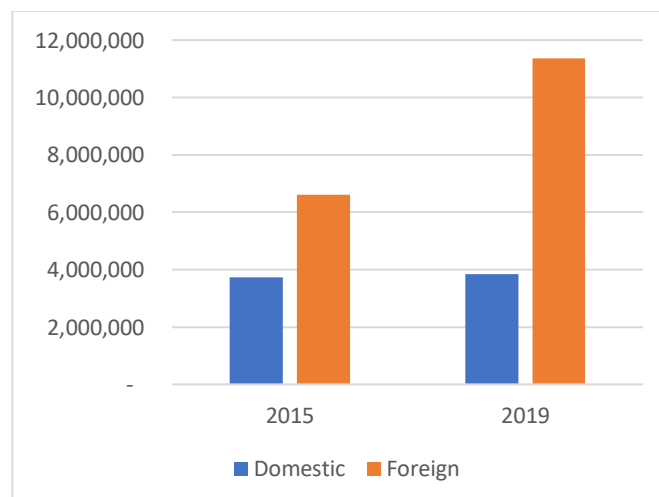
The increase in bednights was + 34%, while arrivals registered a growth of + 58%, in absolute terms it went from 11.6 million in 2015 to 15.7 million in 2019 for overnight stays, and from 3.9 million arrivals in 2015 to 6.2 million in 2019.

The growth in tourism demand, as shown in graphs 2.A and 2.B, was driven by foreign demand (+ 71% overnight stays and + 73% arrivals), while the contribution to the growth of the domestic sector was almost negligible.

*Fig 2.A Tourist arrivals in Slovenia 2015 – 2019*



*Fig 2.B Tourist bednights in Slovenia 2015 - 2019*



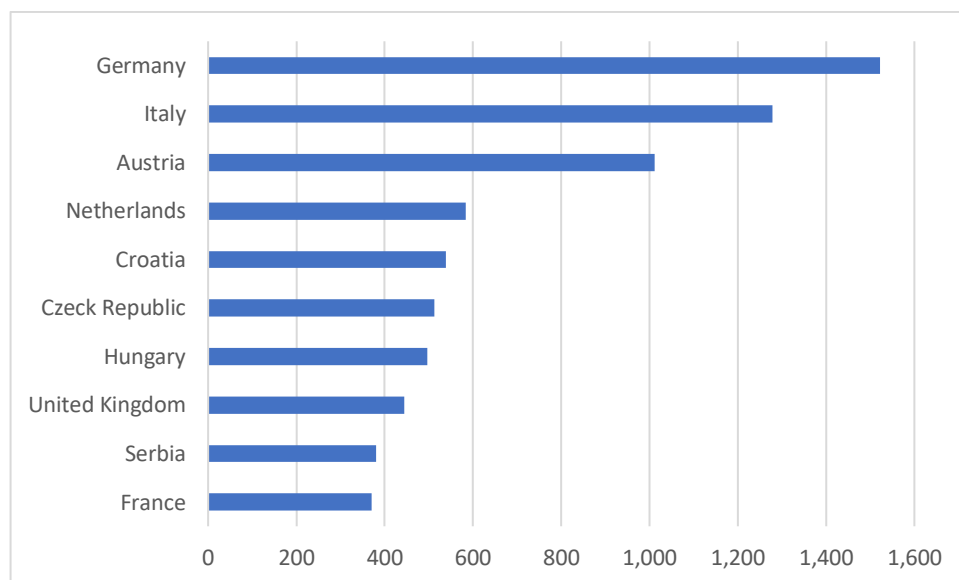
Source: Statistical Office of the Republic of Slovenia

The top 10 generating countries of tourism demand directed towards Slovenia in 2019 are shown in Fig. 3 where they are sorted by number of overnight stays.

In first position is Germany with 1.5 million overnight stays, followed by Italy with 1.3 million overnight stays and in third position Austria with one million nights spent in Slovenia. All the other countries follow far behind.

An aspect to underline about Slovenian foreign demand is the large number of countries generating the visitor flow. From a small country with poor connections in terms of transport lines, a strong concentration of tourist demand could have been expected from a few neighboring countries, but the data contradict this expectation.

*Fig. 3 Top 10 tourism demand generating countries for Slovenia ordered by overnight stays. 2019. (.000)*



Source: Statistical Office of the Republic of Slovenia

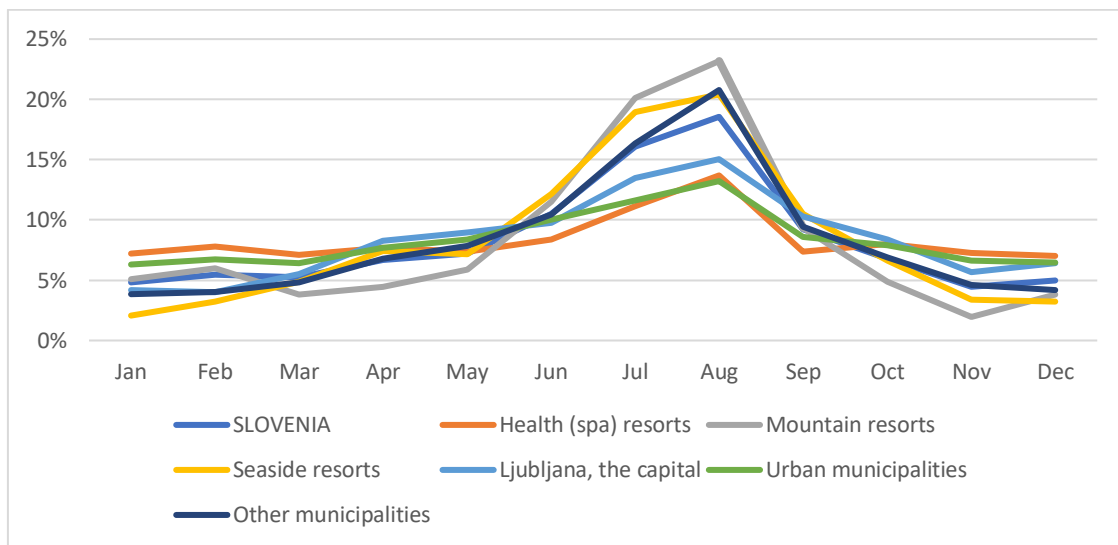
In first position is Germany with 1.5 million overnight stays, followed by Italy with 1.3 million overnight stays and in third position Austria with one million nights spent in Slovenia. All the other countries follow far behind.

Consistently with what has been stated above about the low territorial concentration of demand flows, it appears that the first three countries represent just 33.5% of total foreign demand.

### 2.5.3. Seasonality

The most interesting aspect to be emphasized with respect to the seasonality of Slovenian tourism is its stability, that is, the absence of significant positive and negative peaks.

*Fig. 4 Monthly distribution of the tourist arrivals for tourist regions. Perc.*



In fact, the previous graph shows that even in the months of lower tourist industry activity (for example: October, November) the arrivals curve remains high for almost all regions, while on the contrary the summer peaks of activity are not very high.

The seasonality of Slovenian tourism is predominantly summer, as the following graph shows (see fig. 4). The greatest peaks in the concentration of tourist demand occur in August and July, particularly in mountain resorts, where the two central summer months are worth more (43% of arrivals) than the 4 winter months combined (19%).

Marine tourism is also strongly seasonal and this was easy to predict but also that of the smaller towns and the countryside (Other Municipalities) which confirms the preference for these territories of lovers of physical activities in nature.

The areas less subject to seasonal fluctuations are, as could be assumed, the urban ones, a destination for cultural and business tourism.

## 2.5.4. Slovenian Marketing Strategy

The good state of health of Slovenian tourism depends not only on its cultural and natural resources and on the resourcefulness of its population, but also on an effective marketing action that does not end with the promotion on foreign markets, but also deeply affects the tourist offer of the country.

Over the last five years Slovenia has pursued a positioning strategy strongly focused on green tourism. The strategic vision of Slovenian tourism states that:

“Slovenia is a global green boutique destination for a discerning visitor looking for diverse and active experiences, peace and personal benefits.

... green boutique ...

- o Emphasis on the Slovenian green experience at all stages of the consumer journey.
- o High quality visitor experiences.
- o Feeling of boutiqueiness during the holidays in Slovenia<sup>82</sup> "

The key tool to implement this vision is the Green Scheme Slovenian Tourism (GSST). The scheme's key strategic objective is to introduce sustainable models to Slovenian tourism, to both tourism service providers and destinations.....



The GSST is a tool developed at the national level and a certification programme that carries out the following tasks under the SLOVENIA GREEN umbrella brand:

- brings together all efforts directed towards the sustainable development of

tourism in Slovenia,

- offers tools to destinations and service providers that enable them to evaluate and improve their sustainability endeavours,

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<sup>82</sup> Sustainable growth strategy of Slovenian tourism 2017-2021. Pages 28-29. Republic of Slovenia. Ministry of Economic Development and Technology.

- promotes these green endeavours through the SLOVENIA GREEN brand.

Destinations can obtain the SLOVENIA GREEN Destination label by applying and completing an eleven-step process:

1. appointment of a green coordinator,
2. setting up a green team,
3. increasing awareness,
4. signing a green policy,
5. carrying out surveys,
6. gathering information,
7. submitting reports and the application for an assessment,
8. drafting an action plan for measures,
9. determining the local character and USP,
10. submitting an application for a field visit,
11. realising measures
12. and, after three years, re-assessment.

..... Depending on their level of fulfilment of the eleven criteria, destinations can be awarded the label SLOVENIA GREEN Destination: Bronze, ...Silver....Gold...Platinum for the highest level of fulfilment of the criteria.....

.....To make it easier to carry out the procedure of joining the GSST, we provide destinations and operators with the Manual on Obtaining, Maintaining and Renewal of the Slovenia Green Label (with appendices) and the Rules on Obtaining, Maintaining and Renewal of the Slovenia Green Label, which cover the entire procedure for obtaining the SLOVENIA GREEN label.”<sup>83</sup>



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<sup>83</sup> [https://www.slovenia.info/uploads/dokumenti/zelena-shema/2018\\_gradiva/kratekpregledmaj18eng.pdf](https://www.slovenia.info/uploads/dokumenti/zelena-shema/2018_gradiva/kratekpregledmaj18eng.pdf)

## 2.5.5. Best practices

According to the requirements of the GSST, Slovenian destinations to be recognized as excellent from an environmental point of view and awarded by the Green Scheme must also receive some international recognition among those pointed out by the GSST itself.

One of these international awards is issued by Green Destinations<sup>84</sup> which every year during the ITB in Berlin issues its awards to destinations that have distinguished themselves for their commitment to the environment and environmental quality. In 2020, the following Slovenian locations were listed among the top 100 green destinations:

### **Bled**

<http://collection.greendestinations.org/dest/bled>

This destination participated in the 2020 Sustainable Top 100 Destination Awards at ITB Berlin and was the 3rd place of the ITB Earth awards category.

Now the challenge is: *Waste reduction matters just as much as waste separation!* While the campaign is still under way, its goal is to inform locals and tourists on how to generate as little waste as possible. This is an extremely difficult task requiring a change in lifestyle.

The task is being implemented by the public company “Infrastruktura Bled” in cooperation with the Municipality of Bled and with the institution “Turizem Bled”

### **Miren Kras**

<http://collection.greendestinations.org/dest/miren-kras/>

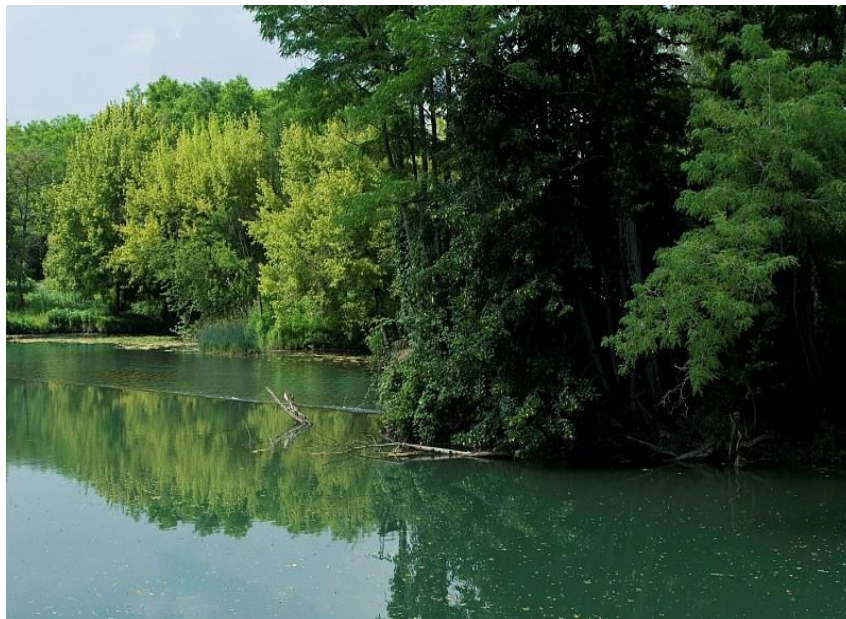
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<sup>84</sup> <https://greendestinations.org/>



Miren Kras presented two Good Practice stories at the Global Green Destination Days 2019, dealing namely with the reduction of the use of plastic at events and e-mobility.

This destination participated in 2020 Sustainable Destination Award ITB Berlin by submitting a good practice story and was the winner of the Best of Europe together with 7 Slovenian destinations: A promotional campaign of e-mobility *Together for a green future* carried out on the initiative of the tourist destination Miren Kras in collaboration with the public and private sector: • Slovenian Tourist Agency, carrier of the tourist Green scheme of Slovenia • Company Petrol d.d., main developer of e-charging points



and providers of electric cars • Mayors of 5 municipalities of the Goriška region acting as crucial pointers of development in the local areas. Tourist destination MIREN KRAS as the initiator and developer of the conceptual idea. •

Carried out with the support of the State Secretary of the Ministry of Economy, Development and Technology / Tourism Department.

## Podčetrtek

<http://collection.greendestinations.org/dest/podcetrtek/>



They say that here everybody works together for the same goal and Podčetrtek is often referred as a leading example of teamwork at the tourist destination.

51% of the destination lies in the Kozjansko regional park, known for its biodiversity and devotion to the preservation of old types of fruit like apples and pears. The village Olimje, which received the Entente Florale gold award in 2009 and 2013.

## Rogaška Slatina

<http://collection.greendestinations.org/dest/rogaska-slatina/>



The responsible development, which is also devoted to sustainable development, is reflected in the very well-maintained public areas and high-quality infrastructure that increases traffic safety.

Other destinations included in the top 100 destinations were:

- Brda, <http://collection.greendestinations.org/dest/brda/>
- Dolina Soče, <https://www.soca-valley.com/en/>
- Kočevsko, <https://www.kocevsko.com/>
- Ljubljana, <http://collection.greendestinations.org/dest/ljubljana/>
- Logarska Dolina (Solčavsko), <https://www.logarska-dolina.si/index.php?id=1>

## The slovenian ecotourism products

The tourism products that constitute the Slovenian ecotourism offer are indicated in the Sustainable Growth Strategy of Slovenian Tourism (page 44) and are listed below:

### ***Product 1: "Rural tourism: stays on farms and in rural residences"***

The product is an important support for agricultural production, high quality authentic cuisine, authentic hospitality and numerous experiences in contact with nature, culture and people. "

The role of farm tourism is rather modest in terms of accommodation capacities and number of tourists (see Tab 2) – although by no means insignificant.<sup>85</sup> In total, there are about 1800 farms and almost 5300 beds, that is just over 2% of the total Slovenian accommodation capacity.

Some researches on the sector, even if a little dated, point out some relevant elements of this form of hospitality:

...Among the motives for staying on a tourist farm, two were of greater importance: "good home-made food and drink" and "staying in peaceful, rural environment". Respondents evaluated the importance of different factors on the scale from 1 (not important) to 5 (very important). The average values of these factors were 3.9 and 3.7. Of above average importance were two additional factors: "more personal attitude to the guest" and "low price" (average value of 3.3). .... Also in our case the interest of visitors in some specifically agrarian characteristics of tourist farms was rather low ("familiarizing with the farming way of life", "interest in farm animals").

In a system of small hospitality structures, demand drives the development of the offer. The Slovenian farms did not follow this model: *"Less favourable natural conditions for agriculture with small farms and fragmented agricultural land have forced farmers to earn income also from other sources on the farm or even outside the farm..... Therefore, tourism supply to a large extent reflects existing opportunities and interests of farmers and not demands of the tourism market. We should also consider also the fact that usually farmers do not have previous experience with similar work. Lack of experiences, knowledge, and skills negatively affect their ability to adapt their offer to the demands of tourism market.."*<sup>3</sup>

### ***Product 2: Adventures in nature: visits and explorations to Slovenian protected areas, enjoying of the view***

A boutique product of the experience of nature, with high added value, based on the concept of Slovenia's exceptional natural conditions, sustainable development, excellent interpretation and distinctive experiences.

*Protected areas of Slovenia include one national park (Triglav National Park), three regional park, several natural parks, and hundreds of natural monuments and*

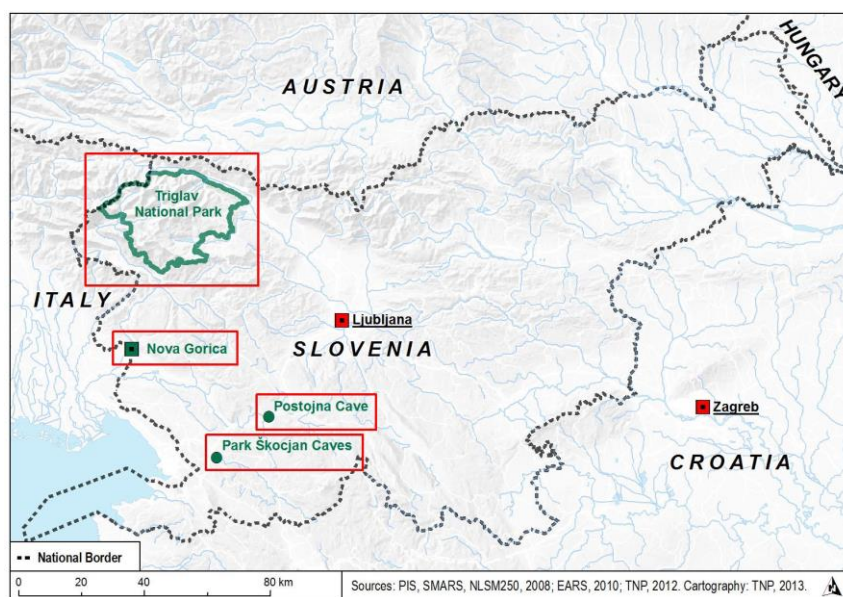
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<sup>85</sup> Dejan Cigale, Barbara Lampic, Irma Potocnik-Slavic "Interrelation between tourism offer and tourism demand in the case of farm tourism in Slovenia" Europe Countries. 4-2013

monuments of designed nature. They cover about 12.5% of the Slovenian territory.[1] Under the Wild Birds Directive, 26 sites totalling roughly 25% of the nation's land are "Special Protected Areas"; the Natura 2000 proposal would increase the totals to 260 sites and 32% of national territory.<sup>86</sup>

Triglav National Park is the only national park in Slovenia. It covers an area of 840 sq km, equal to 4% of the Slovenian territory, in the western part of the Julian Alps on the border with Italy and Austria.

Fig. 5 – Triglav National Park boundaries



Just over 2.2 thousand people live in the park and it is visited every year by about 2 million people,<sup>87</sup> including tourists and hikers. In 2010 and 2012 a survey of park visitors was conducted to determine its characteristics. Even if the data is not recent it is worth considering it (See Tab.3)<sup>88</sup>.

<sup>86</sup> [https://en.wikipedia.org/wiki/List\\_of\\_protected\\_areas\\_of\\_Slovenia](https://en.wikipedia.org/wiki/List_of_protected_areas_of_Slovenia)

<sup>87</sup> University of Nova Gorica "Decision support in the implementation of sustainable development in protected areas regarding environmental education and ecotourism" Dissertation, Mojca Stubelj Ars, 2014

<sup>88</sup> University of Nova Gorica "Decision support in the implementation..." pag 80

*Tab. 2 Demographics of hikers in Triglav National Park reasons for visiting the park and hiking on a greenway and hiker's company on the greenway.*

Hikers' demographics	N	%
Origin	99	100.0
Visitor	91	91.9
Park resident	8	8.1
Country of origin	100	100.0
Slovenia	59	59.0
Europe (other than Slovenia)	41	41.0
Gender	96	100.0
Male	44	45.8
Female	52	54.2
Age range	99	100.0
under 18	6	6.1
18 – 24	10	10.1
25 – 30	17	17.2
31 – 40	21	21.2
41 – 50	18	18.2
51 – 60	19	19.2
61 – 70	8	8.0
71 or more	0	0.0
Level of education	100	100.0
High school	6	6.0
College	34	34.0
Undergraduate degree	29	29.0
Graduate school	18	18.0
Graduate or professional degree	8	8.0
Doctorate	5	5.0
Visiting the park for	96	100
Vacation	48	50.0
Weekend trip	14	14.6
A day in nature	31	32.3
Organized activity	3	3.1
Reason for visiting the greenway	99	*
Educational opportunity	4	4.0
Recreation	39	39.4
Enjoy nature	64	64.6
School trip or excursion	2	2.0
Leisure and pleasure	21	21.2
Curiosity	6	6.1
Came to the greenway with	98	100
Organized group	2	2.0
Alone	18	18.4
As a couple	42	42.9
With parents	7	7.1
As family with children	13	13.3
With grandchildren	2	2.0
Friends	14	14.3

When the survey was carried out, the mountain had not yet reached the prevalence among Slovenian tourist destinations, perhaps, for this reason 60% of the hikers were Slovenes and 40% foreigners (mainly Czechs, followed by Italians and Austrians).

There is no clearly prevalent age group, 76% of the total is between 25 and 60 years old. Vacationers (50%) and excursionists (32%) are the two main categories of hikers, while spending a day immersed in nature (64%) and recreation (39%) are the two main reasons.

***Product 3: Outdoor tourism, sports in nature Hiking, Biking, Trekking, Horse riding, Animal watching,***

Outdoor activities are certainly one of the strengths of Slovenia's tourism offer, as evidenced by a survey on the English market in 2017<sup>89</sup>.



However, already in 2014 the first problems and conflicts in the use of the territory by the various sports began to emerge. In this regard, a survey conducted in 2015 by the Slovenian Mountain Bike Consortium is very interesting. The sample was very large (over 1800 respondents), all MTB practitioners.

The survey, the results of which are compared with those of other surveys, shows how the practitioners of this sport have substantially similar social and demographic characteristics in the different countries where the surveys were carried out, but above all it highlights how the practice of this sport gives result in a series of conflicts with other beneficiaries of the natural environment.

“Conflicts

- just under 50 % of the riders had come into verbal or physical conflict with any other user group over last 12 months;

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<sup>89</sup> Valicon Tourism, Slovenska Turisticna Organizacija: IDENTIFICATION OF UK MARKET POTENTIAL. Report on the survey about travel habits, Slovenia's position and segmentation of tourists. pag 44 – 45, 2017.

- most frequent conflicts with hikers and landowners;
- increases the odds of conflicts:
  - importance downhill riding speed,
  - more frequent riding on signposted mountain hiking trails,
  - number of bike park visits,
  - riding in a group,
  - age.

*Tab 3: Main results of survey on slovenian Mountain bikers*

	Slovenian surveys		Other countries <sup>b)</sup>			
	Survey of mountain bikers (n = 1,809)	Kurdija et al., 2008 (n = 78) <sup>a)</sup>	Symmonds et al., 2000 (n = 406)	Cessford, 1995 (n = 504)	Keating, 2009 (n = 486)	Delius Klasing, 2010 (n = 14,873)
<b>Age</b> <i>mean (std. dev)</i>	33.41 (10.50)	35.05 (10.81)	33.1 (n/a)	n/a	35.5 (n/a)	36.9 (n/a)
<b>Gender</b>						
Male	90.5%	76.9%	90%	85%	97%	67%
Female	9.5%	23.1%	10%	15%	3%	33%
<b>Employment status</b>			n/a			n/a
Student/pupil	24.1%	16.7%		21%	12%	
Employed	68.0%	74.4%		62%	82%	
Unemployed	6.6%	5.1%		3%	3%	
Retired	1.3%	3.9%		n/a	1%	

Notes:

Data are only tentatively comparable due to differences in sampling methods and question content between surveys.

<sup>a)</sup> Analysis of respondents who reported mountain biking at least once in the past 12 months.

<sup>b)</sup> Some of the surveys included respondents from several countries.

### **Management implications**

- Riding on narrow trails in natural areas is a highly desirable experience among Slovenian mountain bikers.
- Riding in natural areas is commonly practiced and largely tolerated despite legal restrictions. However, organized and commercial mountain biking activities are restrained.



- Respondents are willing to voluntarily participate in trail maintenance, while increased fines would not substantially alter their riding practices. <sup>90</sup>

Not to mention the impacts that incorrect behavior by bikers can have on the terrain, vegetation and animals.

## **An estimate of the tourists who practice ecotourism**

Taking into account the choice so strong for green tourism, it is interesting to estimate the share of ecotourism practitioners. Unfortunately, there are no official or academic data in this regard, so we tried to estimate the order of magnitude of this variable (the exact one is beyond our possibilities), using official data and adding the tourists who have:

- stayed in agritourisms
- vacation in the mountain area in the summer months (May - October)
- preferred the smaller urban centers.

A total of 2,105 thousand (30% of total arrivals) is obtained for tourists passionate about ecotourism in its various forms for a total of 4,784 thousand overnight stays (34% of total overnight stays).

The foreign component affects these quantities by as much as 87%: 12 percentage points more than the national data of foreign arrivals. A figure that:

- confirms the good positioning achieved by the destination Slovenia on an international market
- the attractiveness of its ecotourism products
- the effectiveness of the offer system of these products. Therefore, it is worth taking a final look at the Slovenian Destination Management Companies.

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<sup>90</sup> <https://www.imba-europe.org/events/imba-europe-summit-2016>

See also: Peter Zajc, Riding styles and characteristics of rides among Slovenian mountain bikers and management challenges. RRA Regional Development Agency Slovenia Koroška, peter.zajc@rra-koroska.si

## The Destination Management Companies

Forty three Slovenian destination management companies are registered on the national tourist board website<sup>91</sup>. A rather large number<sup>92</sup>, especially considering the limited geographical size of the country.

We have processed the tourism products offered by these companies. The tourism products cover a wide range of tourist needs (see tab 4), we counted 14 product categories, and we must consider that some of these in turn aggregate other products, even quite different from the point of view of the service chain.

This large number of products is a sign that DMCs, in order to escape the pressure of competitors, are looking very carefully for less attended customer segments, and performing very strong demand segmentation. City tours, with a clear cultural content, are the most widespread proposal and can be purchased from 50% of companies, sports activities are the second product and are offered by 30% of DMCs. Oil & wine tours, MICE and Gastronomy are proposed by the 20% (more or less) of the companies. All the others are below 10%.

*Tab. 4 - Tourist products supplied by the Slovenian DMC*

Tourism Products	Number of DMC offering the product	
City Tour - Round Trip	16	50%
Multisport	9	28%
Oil & Wine Tours	8	25%
MICE	7	22%
Gastronomy	6	19%
Discover of small destinations	3	9%
Medical / SPA	3	9%

<sup>91</sup> [www.slovenia.info](http://www.slovenia.info)

<sup>92</sup> After a deeper inspection, only 32 of the 43 companies listed on the site are still active.

Photo/painting	3	9%
Cruise	3	9%
Mountain	2	6%
Farm Tourism	2	6%
Train	2	6%
Ancestry Tours	1	3%
Young Tourism	1	3%

Source: our analysis on DMC catalogs

Also in this case, identifying the eco-tourism products is not immediate, by purifying some duplication, a particularly interesting result is obtained: 56% of the DMCs offer ecotourism products. This data indicates that the positioning as a GREEN destination strongly sought by the Slovenian national tourism board is recognized by the demand and strongly supported by the tourism suppliers

## 2.5.6. Legal framework

The field of tourism in the Republic of Slovenia is regulated by the Act on the Promotion of Tourism Development, which determines the planning and implementation of tourism promotion policy, organization for the implementation of tourism policy, frameworks for its planning and implementation at the national level and at the level of the tourist area. It also regulates the conditions for performing the activities of organizing and selling tourist arrangements, tourist management and monitoring, and tourist sports services as a gainful activity.

With the national program Green Scheme of Slovenian Tourism, Slovenia has gained a great deal of international recognition and visibility as a green destination in the last few years, which has consequently been followed by an increasing number of foreign tourists every year. At the same time, tourist activities on farms have developed in Slovenia, which, in their essence, offer closer contact with nature and people.

The Green Scheme of Slovenian Tourism is a tool developed at the national level and a certification programme that carries out the following tasks under the SLOVENIA GREEN umbrella brand:

- brings together all efforts directed towards the sustainable development of tourism in Slovenia,
- offers tools to destinations and service providers that enable them to evaluate and improve their sustainability endeavours,
- promotes these green endeavours through the SLOVENIA GREEN brand. The scheme's key strategic objective is to introduce sustainable models to Slovenian tourism, to both tourism service providers and destinations.

All the objectives of the strategic guidelines are in line with sustainable development and demonstrate concern for the economic, social, cultural, and natural environment.

Having the Slovenia Green Destination, Slovenia Green Accommodation, Slovenia Green Travel Agency, or Slovenia Green Park label, increases the visibility of destinations, accommodation providers, travel agencies or parks and increases the level of promotion they receive through national and international channels. The Slovenian Tourist Board is planning and implementing promotional activities to support sustainability efforts in the project of included destinations, service providers and parks.

In June 2016, the STB and 18 contractual partners (destinations and operators) formed the Slovenia Green Consortium, a strategic partnership aimed at networking, development, and promotion. The members of the consortium face similar challenges in the development and marketing of sustainable tourism, and therefore the collaboration i.e., platform for cooperation and sharing good practices is particularly important.

All members of the GSST can join; today it already includes 30 destinations and 11 operators.

## 2.5.7. Results of Interviews in Slovenia

Slovenia is the country that most decisively proposes itself on the international tourist market as a "green" destination. It is not only a communication strategy aimed at occupying a strategic market position, it also give rise to concrete initiatives to qualify the tourist offer.

The Slovenian National Tourist Board (NTB) informs tourism companies about the importance of climate change and its impacts on tourism and the environment. It encourages the tourism economy to develop sustainable operating models based on sustainable indicators, and sensitizes tourists to adopt more sustainable lifestyles and environmentally friendly behavior.

Since 2015, the NTB has developed the Green Scheme of Slovenian Tourism, the program with which the sustainable management of tourist destinations and enterprises is promoted, evaluated and certified. The protocol is based on international standards mainly of a quantitative type. Currently: 55 destinations; 58 accommodation facilities; 4 parks; 7 travel agencies; 2 attractions; 3 restaurants, and 1 beach are recognized as "***Slovenia Green Members***".

The main targets of the Green Scheme are tourist destinations. Those wishing to receive the Slovenia Green brand are required to subscribe to a green development policy as a sign of official commitment, and to follow a 7-step process that includes awareness raising, creation of a destination profile and the collection of statistical data, all the actors in the tourism system are involved in the project.

Their efforts and activities have been repeatedly rewarded and certified during international events dedicated to green tourism, such as the Green Globe and the EU Eco-Daisy.

The mission of the Slovenian National Tourist Board is strongly oriented to develop an environmentally sustainable tourist offer and to enhance the natural resources of the Country as a desirable context in which to spend the holiday.

Ecotourism in its various forms therefore plays a central role in the Slovenian tourist offer. The strategy, on the other hand, is met with considerable market success, as the country's analysis has shown.

## Triglav National Park

The Triglav National Park is Slovenia's only national park. It's located in the north-west of the country, not far from the Italian and Austrian borders. It owes its name to the highest mountain in Slovenia and the Julian Alps, Mount Tricorn of 2.864 meters above the sea level and includes all the Slovenian Julian Alps: with its almost 840 km<sup>2</sup> it makes up about 4% of the national territory.

Figure: Triglav National Park



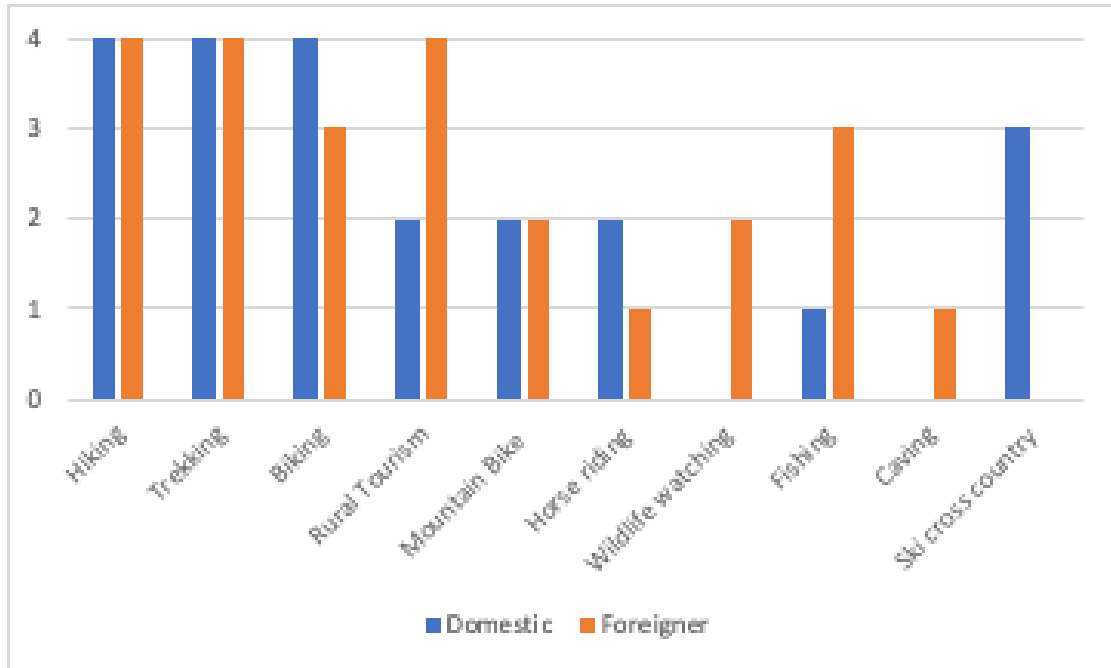
The headquarters of Triglav Park is located in Bled, (<https://www.tnp.si>), the person interviewed is the commercial director of the Park.

The park is an area widely used for ecotourism activities.

The use that tourists of the park make differs significantly according to their country of origin. Apart from hiking and trekking that attract maximum interest from foreign and domestic tourists, the activities most practiced by the latter are biking, much less mountain biking, while wildlife watching is of no interest.

*Level of interest in the different tourist use of the Park area*

1 = no interest ..... 4 = very interested



Visitors to the park from across borders have a wider use of the park's opportunities: rural tourism prevails, followed by fishing and biking while it does not attract interest from cross-country skiing.

Among the activities described in the previous graph, the only one not supported by the park is caving, while all the others see the park actively involved.

Over the next two years, the park intends to focus investments on sustainable mobility. The aim is to reduce car-based travel between the park's different centers of interest, while increasing the use of public transport. The action will be developed involving local stakeholders. The park will try to promote gentle mobility knowing that tourists are very attentive to the use of environmental friendly technologies by the institution managing the park.

On the other hand, the park is certified by the Green Scheme, and the national law establishing natural parks also lays down precise rules for the sustainable management of the territory.

In line with the philosophy based on sustainable tourism, the park tends to promote individual and responsible tourism while it does not welcome the mass tourism

promoted and developed by tour operators. However, it should be noted that the TOs also show increasing attention to respect for the environment and sustainable tourism.

Training is extremely important, especially with regard to tour operators based within the park. Our aim in this regard is to convince them that mass tourism is an activity with only short-term prospects against which the park is strongly opposed.

Training for the park is also important to make known and spread the use of good practices. This type of use of training in their experience has always given rise to good results.

Training is preferable when done in presence, but at the time of the pandemic it is not possible to do otherwise.

## **Public Administration: Regional Development Center (DRC) Koper**

The Regional Development Centre Koper, <https://www.rrc-kp.si/>, acts as an institution on regional level with the aim of promoting business and economic development. It performs the role of regional coordinator of interests on local as well as national level in the fields of regional development, economy, human resources and environment protection. The main activities of the Center are:

- Managing and monitoring of the Regional Development Programme
- Regional Information Centre
- Integrated Rural Development and Village Renovation
- Voucher counselling programme
- SME Guarantee Facility
- Clustering of companies
- Organization of seminars and informative meetings for entrepreneurs

The area administered by DRC Koper comprises all coastal municipalities in Slovenia. The headquarters of the organization is in Koper. It is a highly urbanized territory, home to numerous industrial and commercial activities, the main of which is the port of Koper. However, the tourist industry also has an important presence. In a configuration of the territory, such as the one described, ecotourism does not find much space.

The interviewed is the Director of the Center.



The use that Slovenian and foreign tourists make of the resources made available to them by the local hospitality industry are only partially the same. The activities on which the interests of the two groups of guests converge are biking, rural tourism and caving.

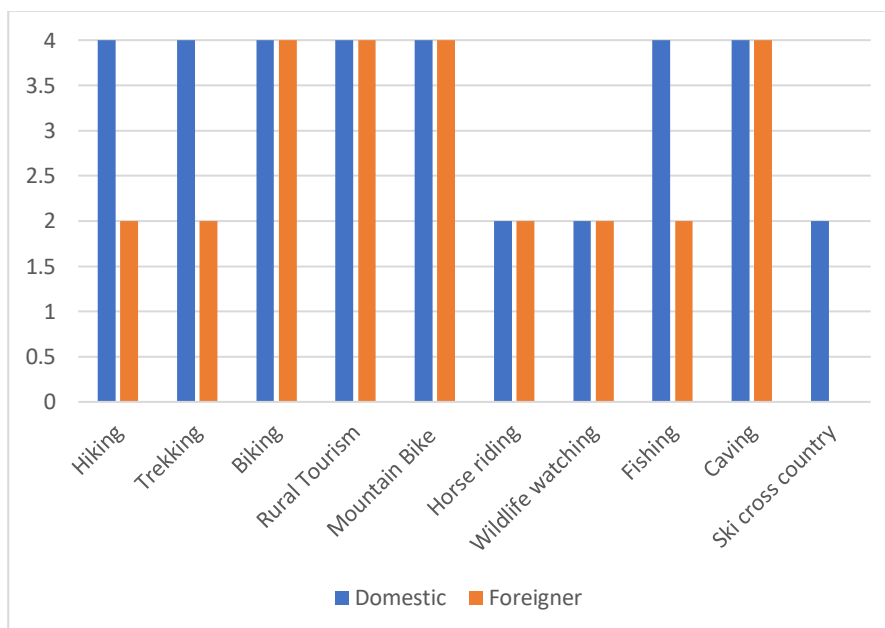
With regard to this last activity, it should be noted that DRC Koper covers a territory, the Karst, rich in caves, hollows, underground rivers and other wonders, probably the most interesting at European level for caving.

Rural tourism and biking are two points of strengths of the Slovenian tourist offer, confirmed even in a coastal territory with a high urban density.

Trekking, hiking and fishing attract Slovenian tourists more while vice versa they have little feedback among foreign guests.

*Level of interest in the different tourist use of the Coast area*

*1 = no interest ..... 4 = very interested*

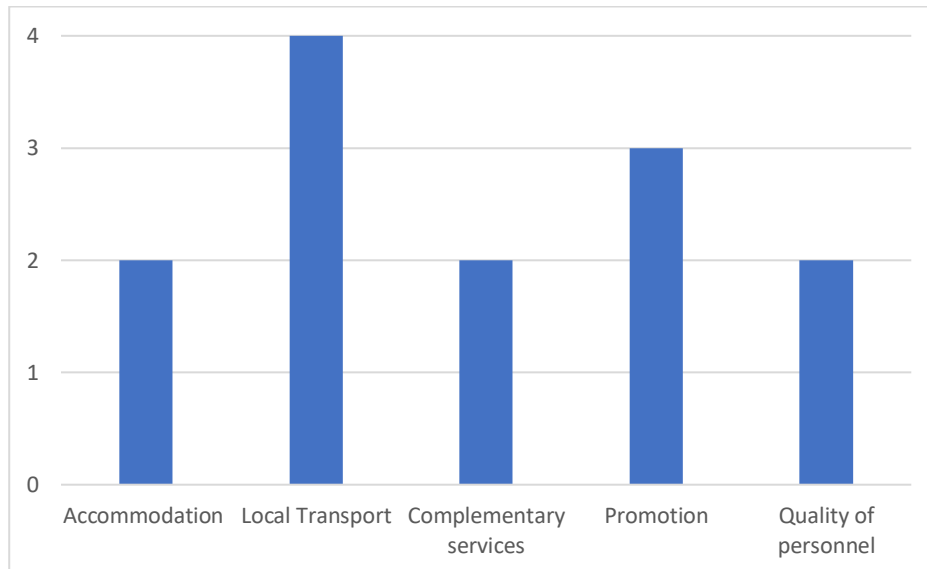


The DRC Koper is committed to promoting all types of ecotourism activities. The only exception is the cross country that is reserved for mountain resorts.

The agency's main problem is local transport: reconciling a sustainable, efficient and widespread mobility system to allow tourists to comfortably visit even smaller locations outside the main circuits is the challenge RDC Koper intends to face over the next two years.

*The main problems of ecotourism by intensity of the problem*

*1 = no probl; 2 = little probl; 3 = problem; 4 = big probl*



The training activity is extremely important, it is not by chance that it is part of the mission of the DRC. Among other things, training is a key tool to promote the dissemination of the Green Scheme among tourism companies.

Tourism enterprises that adhere to the Green Protocol are not very present in the coastal area, and increasing the number of them is an important objective, consistent with the promotion of ecotourism in the coastal area.

### **Destination Management Company: Authentic D.O.O.**

In 2019 the company managed about 15,000 customers, 20% of whom came from abroad. The countries of origin are Italy and Austria.

Consistent with what is highlighted in the commentary on the two previous questionnaires, the product on which the company specializes is trekking.

**Remark.** It is certainly exaggerated from the point of view of the representativeness of the information base, however the fact that a package of 3 days of trekking is sold at 1100€ is still a sign, even if small, of Slovenia's competitive strength in the ecotourism market.

The areas most suited to ecotourism according to the respondent are Gorenjska and Posocje. With Figure 1 as a reference, the first region is the one that includes the Triglav

National Park, while the second follows the valley of the Soca River (Isonzo) which runs parallel to the border with Italy.

The respondent does not detect any substantial differences in the preferences of domestic and foreign tourists with regard to the different types of ecotourism products. The main problem in the Pre-Covid age was to find room allotments available. This confirms the more the success of the Slovenian tourist offers in the ecotourism market.

To meet the growing demand, the interviewee plans to offer new programs for the use of Slovenian natural resources.

To promote the new programs, training has a strategic role as the programs must be explained to potential customers, highlighting the new opportunities offered to them.

The interviewee's favorite training is online, while the online one is only a fallback in a pandemic period. The opinion regarding training is based on solid personal experience, in fact the interviewee often participated in training sessions in search of new products to offer or new technologies to apply.

## 3. FINAL CONSIDERATIONS

### 3.1. The reasons for attending STEFAN

Before to draw some final consideration from the present report it is worth to consider the reason why the five STEFAN partners have decided to take part in the project.

#### **Institut pro regionalni rozvoj, o. p. s. - Czech Republic**

Although CZ is one of the most visited European countries and every year attracts more both domestic and international tourists, no proper attention is paid to ecotourism. In the last few years, there were created some initiatives, f.e. by the NGO Friends of Czech Greenways or Czech Environmental Partnership, dedicated to promoting ecotourism by building up infrastructures of hiking and biking across the country. However, it appears that the development of ecotourism in CZ began to stagnate instead of booming, and therefore it has not reached its potential. Since there is a limited number of available sources promoting and offering information about ecotourism, entrepreneurs, young people, professionals of tourism, and others that we want to focus on in this project, are currently not often aware of the benefits of ecotourism. In CZ, tourism is concentrated mainly in large cities and as a result, many people move from rural areas to cities for work that causes that a lot of rural areas are doomed to decline and the impetus for the development of more sustainable tourism is not that strong.

#### **Ecocenter Alapítván - Hungary**

The project aims oriented to the regional tourism development strategy. The 2/3 of the external visitors are spending less than 1day in Hungary- it is a necessary aim to make incoming tourists stay longer and the development of ecotourism is a perfect tool. The most popular destinations are Budapest 58%, Balaton region 15%, which reveals the strong territorial concentration of tourism. The number of guest nights has climbed in every touristic region since 2012, except for the Central-Transdanubian region and Tisza-lake. The development of these regions could be done with the close cooperation of the different representatives of tourism that would stimulate employability as well. From the side of education in HU there are good examples but the complex cooperation is

missing, therefore STEFAN will be a complex material that institutions could implement into their Educational system.

#### **ASK Development d.o.o. Sustainable development services - Slovenia**

SI: Slovenian Istria has been working a lot in recent years to enhance ecological typical organic products. This offer is getting stronger with well-known manufacturers who also have won prizes abroad, are recognized, renowned. But a Body/Organization connecting the common Promotion of tourism is missing. In recent years, much has been invested in Slovenian Istria. Now the next step would be to promote this territory as an ecotourism destination where you can come and experience sustainable and authentic stays. Tourism promotion should be better coordinated. At present, there is one tourism center in each seashore municipality. For years everyone has been talking and realizing that a common body for the Promotion of Istria would be needed. However, the part of this coordinated and joint organization is missing, and therefore on the tourism map, this region is less recognizable also for ecological tourism.

#### **Academia Postal - Spain**

The general growth of tourism, fostered by economic and social growth, has led people, businessmen, and professionals to want to take advantage of this territory for tourism.

Three tourism models have been developed around this. The current situation is a heterogeneous development following fads, or business possibilities, but not a sustainable and environmentally friendly perspective. It needs Awareness campaign about ecotourism. Training and management tools that improve people's adaptability, consistency of their services, and the potential of ecotourism as a possible economic and labor engine. The promotion of specific examples that show the convenience and profitability of sustainable ecotourism, both economically and ecologically

#### **Association of Environmentally Sustainable Development Green Institute Skopje – North Macedonia**

A country with famous and lesser-known tourist destinations. However, the personal sense of responsibility for the environment and eco-culture still lags far behind, so we can't talk about developed ecotourism. In this regard, activities for the development of ecotourism are more than necessary. Travel operators and local authorities do not have

ecotourism policies and strategies, they need training. On the other hand, there is a need for awareness-raising activities

## 3.2. Three key concepts of the tourism industry

The theoretical part of this document revolves around three central terms for the tourism sector on which the reflection of academics and managers has been developing for years. Intuitively, everyone can more or less exactly express the meaning of these terms, but when it comes to translating these concepts into operational indications, complex problems arise. The three terms at the centre of the reflection are:

1. Ecotourism
2. Sustainable tourism,
3. Tourist destination competitiveness.

Many consider the first and second term as synonyms but, as we will see, this is not the case. The second and third word are linked by the concept of competitiveness of a tourist destination proposed by Crouch & Ritchie.<sup>93</sup>

Originally the definition of **ecotourism** indicated travel to relatively uncontaminated natural areas whose goal was to enjoy the manifestations of nature in its various forms.

A definition not far from the current definition of *nature tourism*. In 2002, the original definition of ecotourism was modified: the concepts of involvement of the resident population and respect for the environment were added to the original definition.

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<sup>93</sup> Ritchie, J. R. B., & Crouch, G. I. (2000). "The competitive destination, a sustainable perspective". *Tourism Management*, 21(1), 1–7.

Crouch, G. I., & Ritchie, J. R. B. (1999). "Tourism, Competitiveness and Societal Prosperity". *Journal of Business Research* 44 (3), 137-152.

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So today we tend to think that ecotourism is intrinsically respectful of nature and therefore sustainable because it takes place in it.

The reality is different: some activities that take place in nature have a rather questionable respect for the environment that hosts them, or they come into conflict

## What is Ecotourism?



with other categories of tourists who love a less hectic approach to vacation. such as highlighting Slovenia's "Country Report" when it comes to mountain biking

Probably, as it's possible to read in some blogs of MTB lovers, it is only the crass reactions of "old" trekkers who now have to share the same trails with a new category of tourists that enjoy the mountain with greater speed and,

perhaps, with less reverential respect. It must be acknowledged, however, that clashing over the use of the same resource, such as a mountain trail, is not a nice business card for an activity that wants to be sustainable.



The writer of present report thinks that the term Ecotourism is rather abused and indicates tourism activities in the nature rather than ecotourism, according to its new definition.

To have proof of this it is enough to scroll through the social media and it will be noted that the word Ecotourism is mistakenly associated with any activity carried out in nature. Also the insiders (TO, guides, journalists, etc.) do the same. Who practice tourism in nature often think that they are doing sustainable tourism just because they are in a natural context and perhaps collect rare plants, spread around waste, disturb animals, while ecotourism requires a series of behaviors aimed at minimizing the human footprint.

Sustainable tourism also considers the impact of the travel and holiday industry on natural, historical and social resources but, unlike ecotourism, it is not linked only to natural environments since sustainable tourism can also be practiced in an urban area.

A second difference between sustainable tourism and ecotourism is that the first incorporates a concept linked to the future, since it states that future generations will have to benefit at least the same resources in the management of a tourist destination today available.

It was Crouch & Ritchie who included long-term sustainability in the concept of competitiveness of a tourist destination. We do not believe that this strong choice was motivated by an ideological 'environmentalist' orientation of the two<sup>94</sup> authors, but by a deep understanding of *the modus operandi* of the tourist industry.

The inclusion of the concept of long-term sustainability is due to the structural inability of tourism to set itself upper limits in terms of number of hosted tourists, or in general of its own demand. An exemplification of this are the over-tourism phenomena that afflict some mass tourist destinations, distorting in depth its economic and social structure.

This kind of bulimia of the tourism sector is very difficult to control due to the multiplicity of actors that make up the travel and holiday sector and has its peaks in the phenomena of over tourism. On a smaller scale it is possible to find it everywhere and at all levels. It is a common experience for all travelers.

These imbalances in the carrying capacity more or less significantly damage the resources available to a territory, thus weakening its long-term competitiveness.

This inability to self-regulate is the greatest threat to the long-term competitiveness of a tourist destination as it consumes those resources that make it attractive. The phenomenon can be very evident and therefore easily identifiable but sometimes it develops in a way that is difficult to perceive, until, almost suddenly, the tourist attraction ceases to be such.

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<sup>94</sup> Even if this is perfectly legitimate.



The relationship between sustainability and competitiveness is therefore organic and long-term, focusing on the competitiveness without taking sustainability into account is like doping an athlete: great results immediately for serious problems later.

### 3.3. Some consideration of country reports and surveys

STEFAN project partners are located in Czech Republic, Hungary, North Macedonia, Slovenia and Spain. These countries are very different and also the levels of tourism development is far to be homogeneous: Spain is a world-leading tourist destination, while North Macedonia is only now entering the holiday market. The other three central European countries lie between these two extremes.

Table 1 provides a synthetic overview of the situation just described. Apart the size of these countries, both in terms of population and surface, it is worth to pay attention to the volume of arrivals and of accommodation capacity. These parameters give a clear idea about the differences between the five partners.

**Tav 1 – Synoptic table of some characteristics of stefan partner countries<sup>95</sup>**

Countries	Inhabitants (M of Inhab)	Surface, New Year' (.000 Km <sup>2</sup> )	% protected areas	Number of tourist arrivals (000 )	Number of accommodation units
Czech Republic	10,7	78,9	14%	10.890	9.383
Hungary	9,8	93,0	21%	6.168	4.444
North Macedonia	2,1	25,7	5%	755	512
Slovenia	2,1	20,2	38%	4.694	9.567

<sup>95</sup> The data in Table 1 are, where stated in the column heading, taken from Eurostat. Sometimes this information differs from that in the "country reports" on the following pages. However, we have decided to refer to the data Eurostat They allow certain comparability to the information in the table.

Spain	47,3	506,0	27%	67.728	52.894
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Source: Eurostat

The Spanish accommodation capacity is about 100 times that of North Macedonia and 5 times that of Slovenia and the Czech Republic. The proportions of tourist arrivals are more or less similar.

An information that offers an interesting point of view on the theme of ecotourism and sustainability is the percentage of national territory that is part of protected areas.

Slovenia and Spain have the highest shares of protected territory: the first just under 40%, the second, over a quarter. These two countries, among the five analysed, are also those with the clearest strategy for exploiting their natural resources through an ecotourism supply.

With only two cases, it is difficult to demonstrate the existence of a direct relationship between the percentage of protected area and the adoption of a clear strategy about ecotourism, but the figure is very clear and some further investigations on the subject deserve to be carried out.

Spain and Slovenia demonstrate not only that they have clear ideas about ecotourism, but that they have also understood the value of sustainability as an essential requirement of tourism competitiveness. In fact, the concept is applied both in areas where the values of nature prevail but also in urban centers. In fact, to quote the Spanish partner

*"According to the Expedia report on sustainable tourism in Spain (2019) these are the first places regarding ecotourism:*

- **Vitoria Gasteiz:** *the city counts on the emblem "Biosphere Responsible Tourism" and was also designed in 2012 as the "European Green Capital".*
- **Bilbao:** *the city is immersed in an Action Plan for Tourism 2019-2025. During this period, more than 90 actions were planned with the aim of strengthening the tourism sector from a sustained and sustainable point of view.*
- **Córdoba:** *This city was about to collapse due to its huge tourism, but the local government decided to work hard to turn the city into a destination that would follow the slow journey and ecotourism.*
- **Menorca:** *This Balearic destination has the declaration of a biosphere reserve."*

Slovenia has also pushed a number of urban centers in the direction of sustainable tourism, requiring them to apply in international contests to be recognised as nationally sustainable cities. The three best-known cities of this Country are:

- **Ljubljana**, ([www.visitljubljana.com](http://www.visitljubljana.com)) the capital of Slovenia, won the European Green Capital award in 2016 and in 2020 won the Best Cities in the Sustainable Top 100 Destination Award category.
- **Bled**, ([collection.greendestinations.org/dest/bled](http://collection.greendestinations.org/dest/bled)). This destination participated in the Sustainable Top 100 Destination Awards 2019 at the ITB in Berlin and was the second winner of the Best of Europe Awards category, while in 2020 she participated in the Sustainable Top 100 Destination Awards.
- **Miren Kras**, [collection.greendestinations.org/dest/miren-kras/](http://collection.greendestinations.org/dest/miren-kras/) This destination participated in the Sustainable Destination Award 2020 ITB Berlin to present the history of good practices and was the winner of the Best of Europe along with 7 Slovenian destinations.

What seems to differentiate the Slovenian approach from the Spanish approach to the issues of ecotourism and sustainability is the different point of origin of the<sup>96</sup> choices in favour of the environment.

In the case of Spain, sustainability seems to arise as an overall need of society, or at least of the most advanced part of it, this collective choice is, in a second time, declined in the tourism sector.

In the case of Slovenia, it is a bit the other way round. Sustainability was born as a strategy to promote and differentiate the Country as tourist destination and, as it meets one of the great social drivers of our time, it becomes a key address for the whole country.

Evidence of this considerations can be seen from the analysis of legislative measures or government acts on the ecotourism.

Spain:

*"The most relevant guide is the **Sector Plan on Nature Tourism and Biodiversity 2014-2020** (Sectoral Plan de Turismo de Naturaleza y Biodiversidad 2014-2020):*

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<sup>96</sup> The judgment is formulated on the basis of only the information collected by the country reports, it is therefore to be understood as an absolutely provisional assessment to be confirmed possibly with more in-depth analysis.

*This sectoral plan is the result of a legislative and regulatory process starting from **Law 42/2007 on Natural Heritage and Biodiversity** (Ley42/2007 of the Natural Heritage y de la Biodiversidad), which has, among its main principles, the appropriate use of natural resources to ensure the sustainability of our natural heritage. It also pursues the integration of the biodiversity perspective into sectoral policies.*

*From this law a strategic plan has been drawn up under the name of Strategic Plan for Natural Heritage and **Biodiversity 2011-2017** (Strategic Plan of Natural Heritage y de la Biodiversidad 2011-2017)<sup>97</sup>.*

Slovenia:

*"The Green Scheme of Slovenian Tourism is a nationally developed tool and certification program that performs the following tasks under the SLOVENIA GREEN umbrella brand:*

- brings together all efforts aimed at the sustainable development of tourism in Slovenia,*
- provides tools to destinations and service providers that enable them to evaluate and improve their sustainability efforts,*
- promotes these green efforts through the SLOVENIA GREEN brand. The main strategic objective of the programme is to introduce sustainable models for Slovenian tourism, both for tourism service providers and destinations.*

*All the objectives of the strategic guidelines are in line with sustainable development and demonstrate concern for the economic, social, cultural and natural environment.*

*Having the Slovenia Green Destination, Slovenia Green Accommodation, Slovenia Green Travel Agency or Slovenia Green Park label increases the visibility of destinations, accommodation providers, travel agencies or parks and increases the level of promotion they receive through national and international channels. The Slovenian Tourism Office is planning and implementing promotional activities to support sustainability efforts in the project of destinations, service providers and parks included.<sup>198</sup>*

No other words are needed to clarify the diversity of approach to the issue of sustainability and ecotourism in the two countries.

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<sup>97</sup> See page 88, Spain "Country Report"

<sup>98</sup> See page 161, Slovenia "Country Report"

A final remark related to Table 1. For obvious reasons, the table does not show the years of experience gained by the various countries as tourist destinations. Very often this figure is overlooked, but this is a very important aspect, since the basic skills spread among the people operating in tourism are directly related to this variable. **The competences in a country with a long tourist tradition are transmitted by the social and productive system itself regardless of formal training processes.**

This difference between the partner countries seems to be evident both in the reports and in the questionnaires and Spain undoubtedly has the greatest experience as a tourist destination.

As far as interviews and questionnaires are concerned, we must first of all thank the efforts made by the partners. A whole of 29 interviews were collected.

The interviews were distributed among the tourist sectors according the table below:

Sectors	Destination Management Company	Agritourism	Natural Park	Pubic Admin	Other	Total
Interviews	7	9	7	5	1	29

and between countries:

Countries	Czech Republic	Hungary	North Macedonia	Slovenia	Spain	Total
Interviews	4	5	10	3	7	29

It should also be noted that in pandemic time it is not easy to implement a survey and even less to do interviews in which much of the information must be collected through unstructured questionnaires.

In general, the results of the survey add color and warmth of the personal experiences to the "Country reports" and in this sense should be read as a complement to the "Country Reports" but they also offer valuable information for the continuation of the project, i.e. **for implementing training services in the tourism sector:**

Of course the information collected in this regard in each country is useful to the local partner, but some general considerations can be drawn.

- A very large part of the respondents are interested (19 vs 3) in the training activity

- Preference is largely for frontal teaching.
- The number of interviewed who have received training is very low
- The majority of respondents is not interested in online training
- But they are available to accept online training due to pandemic
- The content of the activity must be calibrated by country taking into account the different levels of competences, in particular on the themes of sustainable tourism and ecotourism.

It's important to conclude this document with two remarks:

With regard to the lack of interest in online training, it should not be interpreted as an absolute rejection, but as a stimulus to think of different forms of online training. There are experiences, which I think can be taken as an example: one of these experiences uses the Instagram format to make fast but at the same satisfactory information for completeness and speed. It may be worth thinking of a format to test the interests of potential "students".

The differences existing between the partner countries should not be seen as problems but as challenges to build training modules that are able to communicate with everyone and transfer knowledge to everyone (regardless of the language problem).

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## List of Abbreviations

- APST Agency for Promotion and Support of Tourism in the Republic of North Macedonia
- B&B Bed and breakfast
- EKTS European Credit Transfer and Accumulation System
- EU European Union
- IPARD Instrument for Pre-Accession for Rural Development
- LRCP Local and Regional Competitiveness Project
- m.a.s. Meters above sea level
- MKD Macedonian Denar
- NAITAM National Association for incoming tourism of Macedonia
- NAITM National Association for incoming tourism of Macedonia
- NSDRT National Strategy for Development of Rural Tourism
- NSDT National Strategy for the Development of Tourism
- NSSD National Strategy for Sustainable Development
- RNM Republic of North Macedonia
- SSO State Statistical Office
- TDP Tourism Development Plans
- TTCI Travel & Tourism Competitiveness Index
- SWOT Strengths – Weaknesses – Opportunities – Threats
- WTO World Tourism Organization