



This project is funded by the European Union



CROSS-BORDER COOPERATION PROGRAMME

Beyond Borders – Introducing Smart Tourism and Sharing Economy

Benchmarking European Tourism: Tourism Trends and Prospects

'This publication was produced with the financial support of the European Union. Its contents are the sole responsibility of Institute for Research in Environment, Civil Engineering and Energy and Biologists of Albania and do not necessarily reflect the views of the European Union'

Contents

1. INTRODUCTION	5
2. OVERVIEW OF TOURISM POLICY	8
2.1. Sustainable Tourism.....	10
2.2. Cultural Tourism.....	17
2.3. Accessible Tourism.....	21
2.4. Responsible and inclusive tourism.....	23
3. EUROPEAN TOURISM INDUSTRY CHALLENGES	26
3.1. Digital Tourism	27
3.2. Professional skills	27
3.5. Tourism and cultural heritage	28
4. TRENDS IN TOURISM.....	32
4.1. International Tourism Trends.....	33
4.2. European Tourism Trends.....	38
4.3. European Tourism Trends in EU-28 member-states: current situation and forecasts.....	45
4.4. OECD Tourism Trends and Policies 2018.....	47
4.5. Policies and prospects for developing the CBC- North Macedonia and Albania	48
5. OPPORTUNITIES FOR THE EUROPEAN TOURISM.....	55
5.3. Promoting the digitalization of the tourism SMEs.....	55
5.4. Promoting sustainable and responsible tourism, among other through adoption of a Charter for Sustainable and Responsible Tourism	56
CONCLUDING REMARKS.....	59

List of Abbreviations	
ASD	Agenda for Sustainable Development
CTS	Committee on Tourism and Sustainability
DGIMIE	Directorate-General for Internal Market, Industry, Entrepreneurship
ECOFIN	Economic and Financial Affairs Council
ENAT	European Network for Accessible Tourism
ETC	European Travel Commission
ETIS	European Tourism Indicators System
FONATUR	National Fund for Tourism Development
GDP	Gross Domestic Product
ICAO	International Civil Aviation Organization
IEP	Institute of Economics and Peace
IMO	International Maritime Organization
INRouTe	International Network on Regional Economics, Mobility and Tourism
INSTO	International Network for Sustainable Tourism Observatories
IY2017	International Year of Sustainable Tourism 2017
JTA	Japan Tourism Agency
MSMEs	Micro, Small and Medium sized Enterprises
MST	Statistical Framework for Measuring Sustainable Tourism
OECD	Organization of Economic Cooperation and Development
EC	European Commission
EU	European Union
SCP	Sustainable Consumption and Production
SDGs	Sustainable Development Goals
SEEA	The System of Environmental Economic Accounting

SMEs	Small and Medium-sized Enterprises
TSA	Tourism Satellite Account
UNGA	United Nations General Assembly
UNSD	United Nations Statistics Division
UNWTO	United Nations World Tourism Organization
VTO	Virtual Tourism Observatory
WTTC	The World Travel & Tourism Council

1. INTRODUCTION

Tourism is a part of a modern lifestyle, in which geographical mobility and cultural enjoyment are crucial parameters. At the same time, tourism is a lead sector for accelerated economics growth in many countries and regions. Consequently, tourism policy has become an important vehicle of sustainable economic policy in both the developed and the developing world. In many regions and cities, we observe an increasing interest in the potential of tourism and culture as major attraction forces and strategies for economic growth. This trend is part of a broader development from a manufacturing-oriented to an advanced service-led society, in which also information and communication technology plays a key role.

As the third largest EU economic sector, tourism has indeed a broad impact on economic growth, employment and social development.¹ Despite the economic crisis of 2008, Europe remains the n°1 tourism destination in the world. The EU tourism sector quickly recovered and its performance over the last years gave Europe much needed economic boost and jobs. The sector now employs around 17 million people. Its overall contribution to the economy is close to 10% of the EU Gross Domestic Product (GDP), taking into account what tourism brings to other key sectors such as culture, food, construction and transport.²

Europeans need a strong tourism sector for economic reasons, but also to better know each other and better see what unites them. The Union needs for instance more European cultural routes showing how Europeans cooperated, competed or fought. Indeed travelling in the past is often a way to build a better future.³

European tourism however is confronted with many challenges, starting with the need to constantly innovate and improve quality. The sector must quickly adapt to the digital revolution,

¹ See Eurostat, *Tourism Satellite Accounts in Europe - 2013*.

² European Commission, *Guide on EU funding for the tourism sector – 2014-2020, April 2016 ver. 3.3* ISBN 978-92-79-58401-5 (doi:10.2873/251606.) Available at <https://bookshop.europa.eu/en/home/>

³ *Ibid*

with its new ways of marketing, booking services, etc. It must also develop new attractive products in a sustainable manner for local communities and the environment.⁴

Tourism continues to be one of the best positioned economic sectors to drive inclusive socioeconomic growth, provide sustainable livelihoods, foster peace and understanding and help to protect our environment.

However, the sector is facing several major challenges:⁵

- Safety and security concerns and the temptation to build new barriers to travel;
- The technological revolution; and
- Charting a course toward sustainable development.

Considering these global trends and challenges impacting the tourism sector and the 2030 Sustainable Development 2017, reiterated at the 105th Executive Council held in Madrid, Spain in May and the 22nd General Assembly held in Chengdu, China in September:⁶

1. Promoting safe and seamless travel
2. Enhancing the role of technology and innovation in tourism
3. Embracing the sustainability agenda

Over the past century, tourism has experienced continued expansion and diversification to become one of the largest and fastest-growing economic sectors in the world. It is a key driver of socio-economic progress through the creation of jobs and enterprises, export revenues, and infrastructure development. Tourism is estimated to account for 10% of the world's gross domestic product (of which 3% direct, 5% indirect and 2% induced contribution) and one in ten jobs

⁴*Guide on EU funding for the tourism sector 2014-2020, Directorate-General Internal Market, Industry, Entrepreneurship & SMEs, ISBN 978-92-79-58401-5 (doi:10.2873/251606), p.2*

⁵ *UNWTO, Annual Report 2016, p.15. Available at http://cf.cdn.unwto.org/sites/all/files/pdf/annual_report_2016_web_0.pdf*

⁶ *United Nations General Assembly, Adoption of the Agenda, A/RES/674(XXII) (documents A/22/1 prov. rev.1 and A/22/1) Chengdu, China, 11-16 September 2017. Available at: http://cf.cdn.unwto.org/sites/all/files/pdf/a22_resolutions_en.pdf*

globally.⁷ Also in the EU economy, tourism is a crucial economic engine and job creator. The EU has a well-developed tourism sector that caters for substantial demand, both domestic and international, with the latter representing 40% of the world's international tourist arrivals and 31% of international receipts. According to data from Eurostat, EU tourism industries comprised 2,3 million enterprises in 2014, most of them small and medium sized enterprises (SMEs). Enterprises in industries with tourism-related activities employed some 12 million people in the European Union, equivalent to 9% of total employment in the non-financial business economy. Tourism furthermore contributes significantly to the balance of payments, accounting for 6% of the EU's overall exports of goods and services and 22% of its services exports in 2016.⁸

By analyzing studies, reports and data from relevant organizations such as the World Tourism Organization (UNWTO), The World Travel & Tourism Council, Eurobarometer, European Travel Commission, The OECD and others, this study focuses on benchmarking European tourism, conceptualizing trends and prospects. The study tries to explain European Tourism through sustainability, cultural, accessible and responsible tourism following the global tourism trends and promoting digitalization of the tourism, upgrading skills and competences in the tourism sector. This study will address tourism as an engine for economic, sustainable and inclusive growth. The results of the study suggest that governments of developing countries should focus on economic policies to promote tourism as a potential source of economic growth. This study will also suggest that the European trends and policies in tourism need to be implemented in North Macedonia and Albania not only because of economic growth, employment, cultural and environmental preservation, protection for cultural heritage, but also for enhanced cross-border cooperation.

⁷ World Travel & Tourism Council, *Travel and Tourism –Economic impact 2017 World*. Available at <https://www.wttc.org/-/media/files/reports/economic-impact-research/regions-2017/world2017.pdf>

⁸ World Trade Organization, *World Trade Statistical Review 2018*.
https://www.wto.org/english/res_e/statis_e/wts2018_e/wts2018_e.pdf

2. OVERVIEW OF TOURISM POLICY

According to the work published by OECD in 2018, *OECD Tourism Trends and Policies 2018*, tourism is considered to be an engine for economic, sustainable and inclusive growth, and this is why: tourism is one of the largest and fastest growing sectors in the world economy and the economic achievements of tourism are significant. Tourism plays a key role in global economic activity, job creation, export revenue and domestic value added, and directly contributes on average in the OECD area 4.1% of GDP, 5.9% of employment, and 21.3%* of service exports.⁹

Despite the obvious opportunities presented by the expected growth trajectory, tourism faces a range of challenges, in particular: i) the complexity of tourism policy development due to its cross-cutting, multi-level, and fragmented nature, and competing policy priorities and budgetary constraints; ii) the impact of external factors on tourism, including macroeconomic conditions, exchange rates, safety and security, and natural disasters; iii) the global shift to a resource-efficient economy; and iv) the continued transformation of tourism services linked with emerging technologies and digitalization of the economy.¹⁰

Tourism, when built upon broad stakeholder engagement and sustainable development principles, can contribute to more inclusive growth through the provision of employment and economic development opportunities in both urban and rural areas, and promote social integration. Tourism can also raise awareness of cultural and environmental values, and help finance the protection and management of protected areas, and the preservation of biological diversity. In recognition of tourism's potential to advance the universal 2030 Agenda for Sustainable Development¹¹, 2017 was declared International Year of Sustainable Tourism for Development.

The declaration by the United Nations of 2017 as the International Year of Sustainable Tourism for Development has drawn further attention to the sustainable tourism agenda and the contribution of the sector to the Sustainable Development Goals. This is reflected in policy priorities in many countries, with actions taken to improve the monitoring of tourism impacts,

⁹ *OECD Tourism Trends and Policies 2018*, p. 11. Available at <http://www.thinktur.org/media/TENDENCIAS.pdf>

¹⁰ *OECD, Policy Statement – Tourism Policies for Sustainable and Inclusive Growth*, Paris, October 2017, p. 2. Available at <https://www.oecd.org/cfe/tourism/OECD-Policy-Statement-Tourism-Policies-for-Sustainable-and-Inclusive-Growth.pdf>

¹¹ *United Nations, 2030 Agenda for Sustainable Development*, Available at <https://sustainabledevelopment.un.org/post2015/transformingourworld>

extend certification schemes, encourage the use of new technologies and green finance instruments, and generally promote environmentally sustainable and socially inclusive tourism growth.¹²

The International Year will promote tourism's role in the following five key areas:¹³

- (1) Inclusive and sustainable economic growth;
- (2) Social inclusiveness, employment and poverty reduction;
- (3) Resource efficiency, environmental protection and climate change;
- (4) Cultural values, diversity and heritage; and
- (5) Mutual understanding, peace and security.

Key policy messages

Fostering an integrated policy approach:¹⁴

- Develop long-term strategies that consider the trade-offs and complementarities with related policy areas, and clearly identify the roles, functions, and interactions of key stakeholders.
- Recognize the value of strong dialogue between government, industry, and civil society in the development, implementation and monitoring phases.

Preparing for megatrends:¹⁵

- Build systemic and strategic approaches to adapt in an increasingly fast-moving, interconnected and dynamic environment.
- Modernize regulatory and legislative frameworks, broadly engaging with key stakeholders in their development, and supporting predictive mechanisms in the policy and regulatory process.

¹² UNWTO The declaration by the UN of 2017 as the International Year of Sustainable Tourism for Development A/RES/70/193. Available at) <http://www2.unwto.org/content/international-year-sustainable-tourism-development-2017>

¹³ *Ibid.*

¹⁴ OECD (2018), "Executive summary", in *OECD Tourism Trends and Policies 2018*, OECD Publishing, Paris. DOI: <https://doi.org/10.1787/tour-2018-4-en>

¹⁵ OECD Tourism Committee, *High Level Meeting on Tourism Policies for Sustainable and Inclusive Growth, Analyzing Megatrends to Better shape the future of Tourism*, 2-3 October 2017. *Preparing for megatrends*: <https://www.oecd.org/cfe/tourism/Tourism-meeting-Issues-Paper-on-Analysing-Megatrends-to-Better-Shape-the-Future-of-Tourism.pdf>.

- Cultivate partnerships with industry, other governments, and civil society to address the cross-cutting impacts of megatrends, and developing responses that account for new and innovative business approaches to service delivery.

- Take steps to future-proof tourism policy and promote a culture of innovation and change management within government to ensure that long-term megatrends are given due consideration, notably through robust data analysis and scenario planning.

The future of tourism will be impacted by large-scale social, economic, political, environmental and technological changes, bringing new and often unseen challenges, threats and opportunities.

Promoting investment and financing for sustainable tourism:¹⁶

- Incorporate environmental and sustainability criteria into public financing and investment supports, and encourage the uptake of green financing instruments for tourism projects, notably by leveraging private investment.

- Encourage more responsible business practices in tourism through the integration of environmental and social criteria into tourism policies and programmes, mobilisation of green investors, and uptake of sustainable practices by businesses.

- Build-capacity and better co-ordinate actions across different levels of government and Policy areas, including tourism, environment and innovation, to support the shift to more sustainable tourism investment and financing practices.

- Improve data and analysis on green finance and investment in sustainable tourism development, to accurately integrate environmental risk into tourism financing and investment decisions, and develop a better understanding of the economic, social and environmental outcomes of tourism investment.

2.1. Sustainable Tourism

Tourism is based on people and places and the interaction between them. For this reason, it is particularly sensitive to the conditions of the social and physical 2 environment. It depends on the provision of destinations that are attractive, diverse, safe and welcoming. For this reason also,

¹⁶ *Ibid.*

the industry itself must ensure that its impact on people and sites is of benefit and provides renewal and resilience.

The year 2017 was the International Year of Sustainable Tourism for Development, a global recognition of tourism's transformative contribution to the development agenda. In december 2015, the United Nations General Assembly declared 2017 as the International Year of Sustainable Tourism for Development, a global recognition of tourism's transformative contribution to the development agenda.¹⁷ The activities and events that took place throughout 2017, in the framework of the International Year, served to raise awareness worldwide of the sector are potential to lead economic growth, social inclusion and cultural and environmental preservation.

In late 2015, world leaders agreed upon 17 SDGs to guide our development until 2030. Tourism is committed to do its part in this common endeavor. It is included as a target in three out of the 17 SDGs:¹⁸

- Under goal 8, 'Decent Work and Economic Growth', target 8.9: By 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products;¹⁹

- Under Goal 12.b, 'Responsible Consumption and Production! Develop and implement tools to monitor sustainable development impacts for sustainable tourism that creates jobs and promotes local culture and products;²⁰ and

- Under Goal 14.7, 'Life Below Water' target 14.7: By 2030, increase the economic benefits to Small Island Developing States and least developed countries from the sustainable use of marine

¹⁷ UNWTO The declaration by the UN of 2017 as the International Year of Sustainable Tourism for Development A/RES/70/193. Available at) <http://www2.unwto.org/content/international-year-sustainable-tourism-development-2017>

¹⁸ UN, Sustainable Development Goals, <https://sustainabledevelopment.un.org/?menu=1300>

¹⁹ UN, Transforming the World: 2030 Agenda for Sustainable Development A/RES/70/1, p. 20. http://www.un.org/ga/search/view_doc.asp?symbol=A/RES/70/1&Lang=E

²⁰ *Ibid.*, p. 23.

resources, including through sustainable use of marine resources, including through sustainable management of fisheries, aquaculture and tourism.²¹

Yet, tourism, a sector accounting for 10% of world's GDP, 7% of global trade and one in ten jobs, can contribute to all 17 Goals. 2017 was a record year for international tourism. International tourist arrivals grew for the eighth consecutive year, a sequence of uninterrupted growth not recorded since the 1960s. Destinations worldwide welcomed 1,323 million international tourist arrivals, some 84 million more than in 2016.²²

- International tourist arrivals reached 1,323 million in 2017.
- 2017 saw growth in international arrivals of some 84 million, or 7%, over 2016.
- Tourism has grown above average, at around 4% per year, for eight straight years.
- 393 million more people travelled internationally for tourism between 2008 and 2017.²³

Tourism in Europe faces many sustainability challenges. Amongst these, there are the problems caused by pressure on resources, the detrimental effect of seasonality in tourism demand, economic uncertainty, and the manner in which it both influences and is affected by climate change. With concerted action these challenges can be met. Indeed, much has been achieved in recent years. Amongst public and private stakeholders there is a growing awareness of the need for sustainable and responsible action.

i. Sustainable economic growth

Creating the right environment for resilient and sustainable economic growth in all parts of the world, supported by: investment in infrastructure and facilities, excellent connectivity and innovative business models that deliver quality products in line with market trends.²⁴

ii. Employment, social inclusion and poverty reduction

Ensuring an equitable distribution of income and benefits from tourism, creating decent jobs, reducing poverty, providing opportunities for women and young people, respecting and

²¹ *Ibid.*, p. 24.

²² UN, *The World Economic Situation and Prospects 2018*, New York, 2018, p. 30-37. Available at: https://www.un.org/development/desa/dpad/wp-content/uploads/sites/45/publication/WESP2018_Full_Web-1.pdf

²³ *Ibid.*

²⁴ UN, *Transforming the World: 2030 Agenda for Sustainable Development A/RES/70/1*, p. 20. http://www.un.org/ga/search/view_doc.asp?symbol=A/RES/70/1&Lang=E

supporting the interests of local and indigenous communities, and encouraging inclusive access to tourism experiences for all.²⁵

iii. Resource efficiency, environmental protection and climate change

The tourism sector is especially sensitive to climate variability and change. Tourism in many regions relies on climate, which defines the length and quality of tourism seasons. Extreme events, such as heat waves, tropical cyclones, heavy precipitations or droughts, are likely to become more frequent and intense, and can play an important role in destination choice. Climate change also has a direct impact on the tourist resources at destinations. Tourism destinations are therefore faced with the necessity to develop adaptation strategies in order to maintain their economic viability and competitiveness. At the same time, activities related to tourism contribute to the emission of greenhouse gases, and tourism stakeholders should therefore participate in the global mitigation efforts.²⁶

Tourism, as one of the most promising drivers of growth for the world economy, can play an important role in driving the transition to a green economy, and contributing to more sustainable and inclusive growth. With close connections to numerous sectors at destination and international levels, even small improvements toward greater sustainability in tourism will have important impacts.²⁷ Helping the tourism sector transition to more sustainable consumption and production patterns by creating opportunities in the green economy; mitigating and adapting to climate change and supporting and gaining from the conservation and sustainable use of biodiversity and natural areas.²⁸

iv. Cultural values, diversity and heritage

During past years there has been a shift in the heritage discourse from a conservation oriented approach to a value-oriented approach, meaning the acknowledgement of the value of cultural and natural

²⁵European Commission, *Employment, social inclusion and social protection policy*. https://ec.europa.eu/europeaid/sectors/policy-1_en

²⁶ Maharaj Vijay Reddy and Keith Wilkes (eds.), *Tourism in the Green Economy*, Routledge, 2018.

²⁷ OECD *Tourism Trends and Policies 2018, Towards investment and financing for sustainable tourism*. [https://www.oecd-ilibrary.org/docserver/tour-2018-7-](https://www.oecd-ilibrary.org/docserver/tour-2018-7-en.pdf?expires=1554109329&id=id&accname=guest&checksum=AA4DECC576010B4B102B62025E0E5B3A)

[en.pdf?expires=1554109329&id=id&accname=guest&checksum=AA4DECC576010B4B102B62025E0E5B3A](https://www.oecd-ilibrary.org/docserver/tour-2018-7-en.pdf?expires=1554109329&id=id&accname=guest&checksum=AA4DECC576010B4B102B62025E0E5B3A)

²⁸ *Ibid.*

heritage for various spheres of life. cultural heritage has a considerable impact in many areas of economic and regional development, sustainable tourism, job creation, improving skills through technological innovation, environment, social identity, education and construction'.²⁹ Cultural and natural heritage has a positive impact on sustainable tourism while tourism can be sustainable only if it includes more intimate interaction with the local culture and the local environment.³⁰

Cultural identity can be tangible such as the built environment, natural environment and artefacts or intangible such as habits, traditions, oral history, etc.³¹

Cultural heritage is one of the priorities in the EU Work Plan for Culture (2015-2018) in line with the European Agenda for Culture which is the strategic framework for the cultural policies of the EU. Priority topics to be implemented on Member State level include participatory governance of cultural heritage; skills, training and knowledge transfer. The work plan calls for the identification of ways to create a European tourism offer based on cultural heritage assets. Further to that, spotlight is given on exploring how digitization of cultural content and digital services can foster the expansion of trans-European tourism networks.

Developing supportive partnerships between tourism and cultural interests, conserving tangible and intangible heritage and cultural values, and pursuing creative opportunities to bring social, educational and economic benefits to visitors and host communities through cultural experiences and exchanges.³²

v. Substantive activities of the International Year 2017

It is important to consider the extent to which tourism has been recognized as a force for development at an international and national level. The International Year of Sustainable Tourism for Development has undoubtedly contributed to wider awareness of tourism's potential for

²⁹ European commission, *The London Declaration of the EC Conference on Sustainable Europe's Cultural Heritage* (2004)

³⁰ EU, *European Regional Development Fund, "Sustainable Tourism: An opportunity for regions to benefit from their Cultural and Natural heritage"*, April 2018, p.1. https://www.interregeurope.eu/fileadmin/user_upload/plp_uploads/policy_briefs/TO6___April_2018_Policy_brief_on_cultural_heritage_and_sustainable_tourism.pdf

³¹ ICOMOS, *International Cultural Tourism Charter, Principles And Guidelines For Managing Tourism At Places Of Cultural And Heritage Significance*. ICOMOS International Cultural Tourism Committee. 2002. www.cultureindevelopment.nl/cultural_heritage/what_is_cultural_heritage.

³² *Ibid.*

positive transformative change. The key challenge ahead of us is to continue to strengthen this recognition and convert it into substantial and coordinated support for action.

The year 2016 was a momentous year for tourism. International tourist arrivals continued their upward trajectory in their seventh straight year of above-average despite many challenges, reaching 1,2 billion. In December 2015, the United Nations General Assembly declared 2017 as the International Year of Sustainable Tourism for Development. The World Tourism Organization (UNWTO) as the specialized Agency of the United Nations for Tourism is mandated to lead the celebrations of the International Year of Sustainable Tourism for Development. These are their main objectives as set out in the 2016 annual report are:³³

- Raising awareness on the contribution of sustainable tourism to development;
- Working with stakeholders to make the sector a catalyst for positive change; and
- Fostering change in policies, business practices and consumer behavior in tourism.

The competitiveness of the European tourism industry is closely linked to its sustainability.

The International Year shall explore and highlight tourism's role in the following five key areas:³⁴

1. Inclusive and sustainable economic growth;
2. Social inclusiveness, employment and poverty reduction;
3. Resource efficiency, environmental protection and climate change
4. Cultural values, diversity and heritage
5. Mutual understanding, peace and security.

2016 proved to be another excellent year for international tourism despite many challenges. International tourist arrivals grew for the seventh consecutive year to reach 1.2 billion, a sequence

³³ UNWTO Annual Report 2016. http://cf.cdn.unwto.org/sites/all/files/pdf/annual_report_2016_web_0.pdf.

³⁴ UNWTO, International Year of Sustainable Tourism for Development 2017. <http://media.unwto.org/press-release/2017-01-03/2017-international-year-sustainable-tourism-development>

of uninterrupted growth not recorded since the 1960s. The strongest growth was recorded in the Africa and Asia and the Pacific regions.

- International tourist arrivals reached 1,235 million in 2016;
- Tourism has grown above average, at around 4% per year, for seven straight years.
- 300 million more people travelled internationally for tourism between 2008 and 2016.
- Growth in advanced economy destinations (+5%) exceeded that of emerging economies (+2%) in 2016.³⁵

Tourism continues to be one of the best positioned economic sectors to drive inclusive socioeconomic growth, provide sustainable livelihoods, foster peace and understanding and help to protect our environment.

Considering these global trends and challenges impacting the tourism sector and the 2030 Sustainable Development Agenda, UNWTO has defined the following three priorities, reiterated at the 103rd and 104th Executive Councils, held in Malaga, Spain in May and in Luxor, Egypt in October-November, respectively:³⁶

1. Promoting safe, seamless and friendly travel
2. Enhancing the role of technology and innovation in tourism
3. Embracing the sustainability agenda.

UNWTO continued to advocate throughout 2016 for tourism as a fundamental component of policies and priorities for sustainable development. Work continued with partners to mainstream sustainable tourism in policy discussions and multinational development economic and peace agendas, ahead of the celebrations of 2017 as the International Year of Sustainable Tourism for Development.

Current tourism measurement standards are largely economic, therefore not useful for informing on tourism's role in sustainable environmental and social development. UNWTO has launched, with the support of the United Nations Statistics Division (UNSD), an initiative Towards

³⁵ *Ibid.*

³⁶ *Report of the Executive Council to the General Assembly, twenty-second session, Chengdu, China, 11-16 September 2017, A/22/6A/22/6.*

http://cf.cdn.unwto.org/sites/all/files/pdf/a22_06_report_of_the_executive_council_to_the_general_assembly_en_1.pdf.

a Statistical Framework for Measuring Sustainable Tourism (MST), a common language and organizing structure for measuring more effectively tourism's economic, environmental and social dimensions, the three pillars of sustainable development.

Overall, the framework will provide a base to:³⁷

- better inform on sustainable tourism,
- facilitate dialogue between different sectors,
- encourage integrated, locally relevant decision making,
- exploit the rich level of data already available, and
- identify additional data that may be needed.

MST will draw from:

- The Tourism Satellite Account (TSA);
- the System of Environmental Economic Accounting (SEEA);
- experiences of the INSTO observatories;
- advances in tourism statistics;
- developments of the International Network on Regional Economics, Mobility and Tourism (INRouTe);
- ongoing developments in environmental-economic accounting; and
- social and cultural dimensions (expected to be integrated in due course).

During 2016, its second year of operation, the 10YFP Sustainable Tourism Programme continued serving as a platform to bring together and scale up existing initiatives and partnerships, and facilitate new projects, to accelerate the shift to sustainable consumption and production (SCP).

The year 2015 was a landmark year for the global community.³⁸ In September, the 70th Session of the United Nations General Assembly adopted the Sustainable Development Goals 2016 (SDGs), a universal agenda for planet and people.

2.2. Cultural Tourism

³⁷ UNWTO Committee on Tourism Statistics and TSA, *Statistical Framework for Sustainable Tourism*, February, 2018. http://cf.cdn.unwto.org/sites/all/files/pdf/sf-mst_feb.pdf

³⁸ UNWTO Annual Report 2015. Available at http://cf.cdn.unwto.org/sites/all/files/pdf/annual_report_2015_lr.pdf

Cultural tourism is the subset of tourism concerned with a traveler's engagement with a country or region's culture, specifically the lifestyle of the people in those geographical areas, the history of those people, their art, architecture, religion(s), and other elements that helped shape their way of life.³⁹ Cultural tourism includes tourism in urban areas, particularly historic or large cities and their cultural facilities such as museums and theatres. It can also include tourism in rural areas showcasing the traditions of indigenous cultural communities (i.e. festivals, rituals), and their values and lifestyle, as well as niches like industrial tourism and creative tourism.⁴⁰ It is generally agreed that cultural tourists spend substantially more than standard tourists do. This form of tourism is also becoming generally more popular throughout the world, and a recent OECD report has highlighted the role that cultural tourism can play in regional development in different world regions.⁴¹

Cultural tourism has been defined as 'the movement of persons to cultural attractions away from their normal place of residence, with the intention to gather new information and experiences to satisfy their cultural needs'.⁴² These cultural needs can include the solidification of one's own cultural identity, by observing the exotic "others".

One type of cultural tourism destination is living cultural areas. Visiting any culture other than one's own is such as traveling to a foreign country. Other destinations include historical sites, modern urban districts, "ethnic pockets of towns, fairs, festivals, theme-parks, and natural ecosystems".⁴³ It has been shown that cultural attractions and events are particularly strong magnets for tourism. The term cultural tourism is used for journeys that include visits to cultural resources, regardless of whether it is tangible or intangible cultural resources, and regardless of the primary motivation. In order to understand properly the concept of cultural tourism, it is necessary to know the definitions of a number terms such as, for example, culture, tourism, cultural economy, cultural and tourism potentials, cultural and tourist offer, and others.

³⁹ Greg Richards, *Cultural Tourism: Global and local perspectives*, Routledge, 2007.

⁴⁰ Borowiecki, K.J. and C. Castiglione (2014). *Cultural participation and tourism flows: An empirical investigation of Italian provinces*. *Tourism Economics*, 20(2): 241-62.

⁴¹ Demonja, Damir. "Cultural Tourism in Croatia after the Implementation of the Strategy of Development of Cultural Tourism" (PDF).

⁴² Richards, G. (1996) *Cultural Tourism in Europe*. CABI, Wallingford. Available to download from www.tram-research.com/atlas.

⁴³ Borowiecki, K.J. and C. Castiglione (2014). *Cultural participation and tourism flows: An empirical investigation of Italian provinces*. *Tourism Economics*, 20(2): 241-62.

Sofia Declaration on World Civilizations and Creative Tourism adopted at the International Congress on World Civilizations and Creative Tourism in Sofia, Bulgaria on 2 December 2016 affirms technology, innovation and the creative industries' role in bringing heritage to life. It calls for:⁴⁴

- promoting conservation and promotion of world civilizations through creative tourism;
- developing a sustainable tourism strategy for the heritage of the world's great civilizations; and
- building partnerships between tourism and creative industries.

The International Conference on Religious Heritage and Tourism held in Utrecht, Netherlands, 5-7 October 2016 discussed the contribution of religious tourism to economic prosperity in cities, villages and regions. Examples of these measures were suggested:⁴⁵

- Methodologies are required to assess the social and economic impact of religious heritage tourism; and
- Multi-stakeholder strategies are needed to develop these sites as authentic travel destinations.

Cultural tourism represents a great opportunity to showcase European heritage and shared values, and promote Europe as a 'unique tourism destination'.⁴⁶ The European Commission works with other international organizations on cultural routes, funds cultural tourism projects, and organizes the annual Crossroads of Europe conference.

The vast majority of Europeans (84%) feel that cultural heritage is important to them personally, and 90% believe that it is important to their country. There is also a strong feeling that cultural heritage is a crucial part of European identity, with 80% believing that it is important to the EU as a whole.⁴⁷

- Many Europeans are proud of the history and culture within their local communities; 82% take pride in historical monuments or sites, works of art or traditions from their region or

⁴⁴ UNWTO, *Sofia Declaration on World Civilizations and Creative Tourism*, Sofia, Bulgaria, 2 December 2016. Available at: http://cf.cdn.unwto.org/sites/all/files/pdf/sofia_declaration.pdf

⁴⁵ UNWTO, *The International Conference on Religious Heritage and Tourism Utrecht, Netherlands, 6 October*.

⁴⁶ European Commission, *Internal Market, Industry, Entrepreneurship and SMEs, Promoting destination Europe*.

⁴⁷ Eurobarometer 2018. Available at https://europa.eu/cultural-heritage/news/eurobarometer-2018-results-have-been-published_en.

country. Also, 7 in 10 agree that they take pride in a historical monument or site, work of art or tradition from a European country other than their own.

- The majority (70%) claimed that living close to places with remarkable examples of Europe's cultural heritage can give people a sense of belonging to Europe.
- Cultural heritage is clearly at the heart of our everyday lives, with 7 in 10 Europeans (71%) living close to a historic monument or site, and over half (51%) being personally involved in some form of cultural heritage. Moreover, 71% also believe that living near places of importance to Europe's cultural heritage can improve their quality of life.
- A large majority of Europeans (88%) believe that Europe's cultural heritage should be taught in schools, as it is highly relevant for our history and culture.⁴⁸

The expansion of cultural tourism over recent decades has played a crucial role in the promotion and protection of tangible and intangible heritage as well as the development of arts, crafts and creative activities. Aiming to explore and advance new partnership models between tourism and culture, the first UNWTO/UNESCO World Conference on Tourism and Culture was held in Siem Reap, Cambodia (February 2015).⁴⁹

Over 900 participants, including over 45 ministers and vice-ministers of tourism and culture, as well as leading international experts, speakers and guests from 100 countries gathered together to address a wide range of topics, including governance models, the promotion and safeguarding of culture, innovation, the role of creative industries, and urban regeneration as a vehicle for sustainable development in destinations worldwide.⁵⁰

The participants reaffirmed their commitment to:⁵¹

1. Build new partnership models between tourism and culture by working towards greater integration of culture and tourism;

⁴⁸ *Ibid.*

⁴⁹ *Siem Reap Declaration on Tourism and Culture – Building a New Partnership Model, Feb, 2015.* http://cf.cdn.unwto.org/sites/all/files/pdf/unwto_unesco_siem_reap_declaration_en.pdf

⁵⁰ *UNWTO Annual Report 2015.* http://cf.cdn.unwto.org/sites/all/files/pdf/annual_report_2015_lr.pdf

⁵¹ *Siem Reap Declaration on Tourism and Culture – Building a New Partnership Model, Feb, 2015, pp.3-5.* http://cf.cdn.unwto.org/sites/all/files/pdf/unwto_unesco_siem_reap_declaration_en.pdf

2. Promote and protect cultural heritage by encouraging tourism activities that contribute to increasing public awareness and support for the protection and conservation of cultural heritage;
3. Link people and foster sustainable development through cultural routes by encouraging and facilitating international and national initiatives that draw together historically or thematically linked heritage places, including World Heritage Sites, into tourism routes, corridors or circuits;
4. Promote closer linkages between tourism, living cultures and creative industries by encouraging and facilitating new forms of cultural tourism, such as creative tourism, and tourism related to special interests such as museums, industrial, underwater or memorial heritage; and
5. Support the contribution of cultural tourism to urban development by encouraging the regeneration of degraded or redundant industrial areas of historic cities including the integration of cultural heritage.

2.3. Accessible Tourism

There are almost 140 million people with special access needs in the EU, including those with disabilities and the elderly population. This number is expected to grow to almost 155 million by 2020. In 2012, people with special access needs and elderly travelers in the EU generated a total gross contribution of more than €780 billion to the EU tourism sector. What's more, the appetite for accessible tourism goes beyond EU borders with more than 17 million people in this category visiting Europe from third countries in 2012.⁵²

Accessible tourism is the ongoing endeavor to ensure tourist destinations, products and services are accessible to all people, regardless of their physical limitations, disabilities or age. It encompasses publicly and privately owned tourist locations. The term has been defined by Darcy and Dickson as:⁵³

⁵² Directorate-General for Enterprise and Industry (European Commission), *Enterprise & Industry*, Publication Office of the EU No. 20 (2-2014), p. 18-19.

<https://publications.europa.eu/en/publication-detail/-/publication/0680021c-1bc8-443d-a94a-b1d68cedb6ab>

⁵³ Darcy, S., & Dickson, T. (2009). A Whole-of-Life Approach to Tourism: The Case for Accessible Tourism Experiences. *Journal of Hospitality and Tourism Management*, 16(1), 32-44.

“Accessible tourism is about making it easy for everyone to enjoy tourist experiences. This isn’t only about social responsibility – there is also a compelling business case to improve accessibility and thus boost the competitiveness of tourism in Europe.”

Accessible tourism enables people with access requirements, including mobility, vision, hearing and cognitive dimensions of access, to function independently and with equity and dignity through the delivery of universally designed tourism products, services and environments. This definition is inclusive of all people including those travelling with children in prams, people with disabilities and seniors.⁵⁴

Modern society is increasingly aware of the concept of integration of people with disabilities. Issues such as accessibility, design for all and universal design are featured in the international symposia of bodies such as the European Commission.⁵⁵ Steps have been taken to promote guidelines and best practices, and major resources are now dedicated to this field.

A greater understanding of the accessible tourism market has been promoted through research commissioned by the European Commission where a stakeholder analysis has provided an insight into the complexities of accessible tourism.⁵⁶

As of 2008, there were more than 50 million persons with disabilities in Europe, and more than 600 million around the world. When expanded to include all beneficiaries of accessible tourism, as defined above, the number grows to some 130 million people affected in Europe alone.⁵⁷ According to the World Report on Disability by World Health Organization and the World Bank in 2011, over 1 billion of people in the world had some disability, of whom nearly 200 million experienced severe difficulty in functioning.⁵⁸

In addition to the social benefits, the market represents an opportunity for new investment and new service requirements, rarely provided by key players in the tourism sector.

⁵⁴ Darcy, S., & Dickson, T. (2009). *A Whole-of-Life Approach to Tourism: The Case for Accessible Tourism Experiences*. *Journal of Hospitality and Tourism Management*, 16(1), 32-44.

⁵⁵ *European and International Associations at the European Commission's Enterprise and Industry Tourism web page January 30 2009.*

⁵⁶ Buhalis, D., Michopoulou, E., Eichhorn, V., & Miller, G. (2005). *Accessibility market and stakeholder analysis - One-Stop-Shop for Accessible Tourism in Europe (OSSATE)*. Surrey, United Kingdom: University of Surrey. http://www.ossate.org/doc_resources/OSSATE_Market&Stakeholder%20Analysis_Public_Version_Fina..pdf

⁵⁷ "ENAT - European Network for Accessible Tourism".

⁵⁸ "World Report On Disability 2011" (PDF).

According to the European Network for Accessible Tourism (ENAT), accessible tourism includes:⁵⁹

- Barrier-free destinations: infrastructure and facilities
- Transport: by air, land and sea, suitable for all users
- High quality services: delivered by trained staff
- Activities, exhibits, attractions: allowing participation in tourism by everyone
- Marketing, booking systems, web sites & services: information accessible to all

Specific problems found by travelers or tourists with disabilities include:

- Inaccessible, or only partly accessible, web sites
- Lack of accessible airport transfer
- Lack of wheelchair accessible vehicles
- Lack of well-adapted hotel rooms
- Lack of professional staff capable of dealing with accessibility issues
- Lack of reliable information about a specific attraction's level of accessibility
- Lack of accessible restaurants, bars, and other facilities
- Lack of adapted toilets in restaurants and public places
- Inaccessible streets and sidewalks
- Lack of technical aids and disability equipment such as wheelchairs, bath chairs and toilet raisers.

2.4. Responsible and inclusive tourism

Travel and tourism is a people's sector. At the heart of its development should be its capacity to bring opportunities for better livelihoods to all. Ensuring benefits reach host communities, enabling accessibility for all to travel, and investing in human capital development are some of the lines of action UNWTO promoted in 2016 towards a fairer and more inclusive sector.⁶⁰

⁵⁹ ENAT - *European Network for Accessible Tourism*".

⁶⁰ UNWTO Annual Report 2016. <https://www.e-unwto.org/doi/pdf/10.18111/9789284418725>

In that occasion the Petra Declaration was adopted on October 27th 2016, which calls for:⁶¹

- an inclusive and sustainable sector based on:
 - human rights
 - social and economic justice and equality
 - responsible and sustainable planning
 - evidence-based decision making
 - the involvement of all stakeholders, including host communities and disadvantaged groups of society;
- provision of fair access to quality training;
- Employment opportunities for youth and women.

The conference itself focused on the role of tourism in creating job opportunities, promoting energy efficiency and strengthening micro, small and medium-sized enterprises (MSMEs).⁶²

The following key conclusions were drawn:⁶³

1. Providing Access to Training and Employment Opportunities: addressing inclusion gaps concerning youth and women, and reducing regional employment and skills disparities. This would include, besides strengthening professional skills for the accommodation and tour operating sub-sectors, incentivizing entrepreneurship in productive sectors related to the tourism value chain.

2. Enhancing Resource and Energy Efficiency: enabling improved building standards and building management capacity. This would entail improving understanding of resource-efficient operations, increasing competitiveness as well as removing barriers for investing in resource efficiency, and promoting sound policies and incentives.

3. Strengthening local Micro, Small and Medium sized Enterprises (MSMEs), enabling them to become integral parts of the complex tourism value chain, which requires integrating trade policy dimensions into tourism planning at national as well as corporate level, particularly with

⁶¹UNWTO, *Declaration on Investing in Tourism for an Inclusive Future, Petra Declaration, October, 2016.*
http://cf.cdn.unwto.org/sites/all/files/pdf/final_petra-declaration_0.pdf

⁶² *Regional Conference on Investing in Tourism for an Inclusive Future: Challenges and Opportunities, organized by the European bank for Reconstruction and Development (EBRD), the Ministry of Tourism and Antiquities of the Kingdom of Jordan, and the World Tourism Organization (UNWTO) in Petra, Jordan, on 26-27 October 2016.*

⁶³ UNWTO, *Declaration on Investing in Tourism for an Inclusive Future, Petra Declaration, October, 2016.*
http://cf.cdn.unwto.org/sites/all/files/pdf/final_petra-declaration_0.pdf

regard to local and sector-specific institutions. In 2017 Travel & Tourism directly supported 12,000 jobs (1.6% of total employment). This is expected to rise by 3.7% in 2018 and rise by 1.3% pa to 14,000 jobs (1.8% of total employment) in 2028.loyment.

Responsible tourism refers to the awareness, decisions and actions of all those involved in the planning, delivery and consumption of tourism, so that it is sustainable over time. To be sustainable, tourism must be economically viable, meet the needs of society and the environment, and in this way, to continue to deliver benefits without detriment to current and future generations. The sustainable competitiveness of the tourism sector is fundamental in the short, medium and long term.

3. EUROPEAN TOURISM INDUSTRY CHALLENGES

In June 2010, the European Commission adopted the Communication, ‘Europe, the world's No. 1 tourist destination – a new political framework for tourism in Europe’.⁶⁴ This communication set out a new strategy and action plan for EU tourism.

Four priorities for action were identified:⁶⁵

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

To date, the Commission has successfully implemented the majority of the actions set out in the Communication, focusing on the following priorities:⁶⁶

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

In order to maintain Europe’s position as a leading tourist destination, the quality of its services needs to be continuously improved. The European Commission is involved in initiatives that improve the skills and mobility of workers, particularly by engaging in global digital networks and helping tourism entrepreneurs manage their businesses. For example, the European Commission manages a range of activities that help small businesses in the tourism sector. Given

⁶⁴ *European Commission, Communication from the Commission to the European Parliament, The Council, The European Economic and Social Committee and the Committee of the Regions, Brussels, 30.06.2010, COM(2010) <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52010DC0352&from=EN>*

⁶⁵ *Ibid.*

⁶⁶ *Ibid.*

the huge impact that digital technologies have on the sector, supporting access to and use of ICT tools is a priority area for the Commission.

3.1. Digital Tourism

The European Commission has implemented several actions to boost the competitiveness of small businesses in the European tourism sector, integrate them into global digital value chains, and improve their ability to create more jobs.

Many actions were undertaken by the Commission in order to help tourism business turn digital such:⁶⁷ live events on digital tourism, (which cover digital marketing strategy, online reputation and use of social media and m-tourism (use of smartphones throughout the entire customer experience), digital Tourism Network (that will comprise representatives from the industry and EU countries to discuss how to boost the innovation capacity of tourism entrepreneurs, especially SMEs) and Tourism Business Portal which is designed to improve the establishment, management, promotion, and expansion of businesses. It includes plenty of articles, tutorials, online tools, and links to best practices to help entrepreneurs learn about the management of a tourism business in the digital era.

The Network will:⁶⁸

- serve as a forum to brainstorm on challenges and opportunities for digital tourism businesses, such as regulatory fragmentation, ensuring a level playing field, big data ownership and access to technology;
- help shape new actions designed to increase the uptake of digital technologies by the tourism sector and improve SMEs' inclusion in the global digital value chain;
- serve as a contact point for their respective networks, including for example, technology providers, online tourism actors of all sizes, traditional tourism service providers, digital policy influencers and public administrations.

3.2. Professional skills

⁶⁷ *Digital Tourism Network, Opportunities and Challenges*. file:///C:/Users/moodle/Downloads/Expedia.pdf

⁶⁸ *European Commission, Internal Market, Industry, Entrepreneurship and SMEs, Digital Tourism*. https://ec.europa.eu/growth/sectors/tourism/support-business/digital_en

To maintain Europe's leading position amongst the world's tourism destinations, the industry needs to continuously improve the quality and mobility of its staff to provide top quality, personalized services to all tourists. Tourism has a huge potential to generate economic growth and create jobs. In Europe, the sector supports 25 million jobs, directly and indirectly.⁶⁹

Tourism is the largest employer of young people, migrants, part-time workers and women. It's the main entry point to the labor market and provides job opportunities to people who want to re-enter the labor market.

At the same time, competitiveness of tourism very much relies on the competencies and skills of its human capital. Moreover, tourism is changing, it's becoming more complex and requires higher levels of skills. Businesses and the workforce must adapt to new technologies, new market demands and changes in customer behavior and expectations.

3.5. Tourism and cultural heritage

The cultural heritage of Europe is "one of the oldest and most important generators of tourism" and it retains its central role in the European tourism industry to this day. According to the European Union, "tourism, especially cultural tourism in a broader sense, deserve priority attention" as policy areas.⁷⁰ Cultural tourism has become recognized as an important agent of economic and social change in Europe. The Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs supports the Tourism and Cultural Heritage Group of the Enterprise Europe Network.⁷¹

The cultural tourism market in Europe is therefore becoming increasingly competitive. A growing number of cities and regions in the EU are basing their tourism development strategies on the promotion of cultural heritage, and the number of cultural attractions is growing rapidly.

⁶⁹ OECD, *Innovation and Growth in Tourism*, 2006.

http://www.liaa.gov.lv/files/liaa/attachments/turisms/petijumi/OECD_Tourism_innovation_growth.pdf

⁷⁰ Richards, G. *Cultural Tourism in Europe*, CAB International 1996, p.3-4
https://books.google.mk/books?hl=en&lr=&id=xroeAQAAMAAJ&oi=fnd&pg=PR7&dq=tourism+development+cultural+policies&ots=TLNymettuf&sig7iaKHtzLVikK7BT3kkgg24XvdOg&redir_esc=y#v=onepage&q=tourism%20development%20cultural%20policies&f=false

⁷¹ European Commission, *Cultural Tourism* https://ec.europa.eu/growth/sectors/tourism/offer/cultural_en

The opening up of new cultural destinations in Eastern and central Europe will add to the growing supply of distractions for the European cultural tourist in future.⁷²

According to the initial findings of the Tourism and Culture Survey 2015 by UNWTO, cultural tourist arrivals are growing steadily compared to overall international arrivals. 40% of international arrivals are considered to be “cultural tourists”, that is, travelers who participate in a cultural visit or activity as part of their stay (UNWTO (forthcoming), Report on Tourism and Culture Synergies)⁷³. As a follow up to the Siem Reap Declaration of 2015 and the Muscat Declaration of 2017, on Tourism and Culture, it is crucial to implement cultural tourism policies and practices in an integrated and sustainable manner.⁷⁴

The Enterprise Europe Network is a key initiative of the European Commission that helps small companies make the most of business opportunities in the EU.

The Tourism and Cultural Heritage Sector Group⁷⁵ is one of 17 expert sector groups at the Enterprise Europe Network who organize brokerage events to help businesses reach technology transfer or cooperation agreements with other companies in their sector.

The Tourism and Cultural Heritage Sector Group also provides other services such as:

- finding business partners for tourism products and services throughout Europe;
- promoting new technologies for tourism and cultural heritage at national and European level;
- arranging bilateral meetings with potential partners at tourism and cultural heritage fairs and company missions (notably in the context of the Mission for Growth initiative)
- advising companies on funding opportunities and helping them apply for EU grants;
- promoting and implementing multidisciplinary research projects in tourism and cultural heritage;
- providing information about international conferences and workshops;
- providing guidelines on starting a business in tourism;

⁷² LF Girard, P Nijkamp, *Cultural Tourism and sustainable local development*, Ashgate Publishing Lmt., 2009. https://books.google.mk/books?hl=en&lr=&id=chNiJ3QEeMYC&oi=fnd&pg=PR9&dq=tourism+development+cultural+policies&ots=6Rgm7tUK3Z&sig=FenX0cXqslqAgRqBrurEQp9b9kk&redir_esc=y#v=onepage&q=tourism%20development%20cultural%20policies&f=false

⁷³ UNWTO, *Tourism and Culture Synergies*, <https://www.e-unwto.org/doi/pdf/10.18111/9789284418978>

⁷⁴ UNWTO, *Survey on Big Data and Cultural Tourism*, <http://www2.unwto.org/webform/survey-big-data-and-cultural-tourism>

⁷⁵ <https://een.ec.europa.eu/about/sector-groups/tourism-cultural-heritage>

- Communicating small business interests and concerns to EU policy makers.

* * *

In order to promote sustainable tourism linked to cultural and natural heritage, regions and tour operators need to create innovative and original offers and unique visitor experience. Hands-on tools such as CHRISTA's guide on industrial heritage⁷⁶ and EPICAH's guide on cross-border tourism⁷⁷ can be helpful tools in establishing ecotourism, spa tourism, equestrian tourism, etc. A systematic development of the strategies of valorisation and promotion of industrial heritage for the purpose of enriching the offer of cultural tourism enables us to make a large step forward in the tourist and cultural sector. The presentation of industrial heritage can be a valuable subject of the tourist offer.

Economically disadvantaged regions in Europe with valuable cultural and natural heritage which can become a source of economic development. As cultural and natural heritage is a potential source for regional economic development for these regions their value should be revealed, promoted and treasured. Such is the case of EPICAH whereby two border regions embark on a joint promotion of their cultural and natural heritage to create more economic opportunities for local people. As cultural and natural heritage is a potential source for regional economic development for these regions their value should be revealed, promoted and treasured.

In order to promote sustainable tourism linked to cultural and natural heritage, regions and tour operators need to create innovative and original niche offers and unique visitor experience. Hands-on tools such as CHRISTA's guide on industrial heritage and EPICAH's guide on cross-border tourism are necessary, the latter covering a number of niche markets such as ecotourism, spa tourism, equestrian tourism, etc. Trends in Information and Communications Technologies (ICT) such as growing broadband and mobile connectivity, the access to online data, etc. determine also the future of the environmental and cultural assets management. Regions and cities need to

⁷⁶ *Policy Learning Guidelines on Industrial Heritage Tourism, Centre for Industrial Heritage (Interreg Europe)*
https://www.interregeurope.eu/fileadmin/user_upload/tx_tevprojects/library/file_1517754714.pdf

⁷⁷ *EU, EPICAH, Interreg Europe, Sustainable Tourism: An opportunity for regions to benefit from their cultural and natural heritage, April 2018.*
https://www.interregeurope.eu/fileadmin/user_upload/plp_uploads/policy_briefs/TO6___April_2018_Policy_brief_on_cultural_heritage_and_sustainable_tourism.pdf

take advantage of the opportunities that digitalization provides for better access to heritage assets and engagement of audiences.

Regional and local authorities can explore and strengthen the links between natural and cultural heritage to generate economic benefits and employment opportunities in key sectors such as sustainable tourism. Cultural and natural heritage is a significant asset for local communities.

Also there is no sufficient ICT uptake in the area of cultural and natural heritage. The fact that most natural, cultural and historical heritage has not been digitalized yet hampers the access of the general public and tourists.

The tourism industry has demonstrated its resilience by sustaining moderate growth levels in recent years. As a result, governments are increasingly recognizing tourism as a resilient activity with the capacity to stimulate economies and help achieve many national objectives. In recent years, tourism has consistently demonstrated the ability to create employment, stimulate capital markets, attract foreign investments, and add value nationally, regionally and locally.

4. TRENDS IN EUROPEAN TOURISM

Tourism plays a major role in the EU economy. According to the European Commission, it is the third largest socio-economic activity in the EU (after the trade and distribution, and construction sectors), and has an overall positive impact on economic growth and employment.⁷⁸ Tourism also contributes to the development of European regions and, if sustainable, helps to preserve and enhance cultural and natural heritage.

Tourism is the third largest socio-economic activity in the European Union (EU), and makes an important contribution to the EU's gross national product and to employment. Europe is also the world's number one tourist destination. Within the global sector, however, Europe is not the fastest-growing region and its market share, in terms of international tourist arrivals and receipts, is shrinking. However, since the entry into force of the Lisbon Treaty in 2009, the Treaty on the Functioning of the European Union (TFEU) allows the EU to support, coordinate or supplement the actions of the Member States in the domain. Adoption of common rules is possible in other policy areas related to tourism where the EU has exclusive or shared competency with Member States (e.g. transport or consumer protection).

Following the entry into force of the Lisbon Treaty, the European Commission prepared an EU tourism strategy with the stated aim of retaining Europe's position as the world's number one tourism destination. In the framework of this strategy, the Commission has launched various projects and initiatives to provide support (mostly financial) for tourism in the EU.⁷⁹

In the area of sustainable, responsible and high-quality tourism, the Commission proposed to monitor sustainable management of tourism destinations and protect the heritage of tourism destinations. The Commission aimed also to strengthen EU cooperation with emerging countries and Mediterranean countries.⁸⁰

⁷⁸ *European Parliament, Tourism and the European Union, Recent trends and policy developments, 2015.*
[http://www.europarl.europa.eu/RegData/etudes/IDAN/2015/568343/EPRS_IDA\(2015\)568343_EN.pdf](http://www.europarl.europa.eu/RegData/etudes/IDAN/2015/568343/EPRS_IDA(2015)568343_EN.pdf)

⁷⁹ <https://eur-lex.europa.eu/legal-content/HR/TXT/?uri=CELEX:12007L/TXT>

⁸⁰ *European Parliament, Tourism and the European Union, Recent trends and policy developments, 2015.*
[http://www.europarl.europa.eu/RegData/etudes/IDAN/2015/568343/EPRS_IDA\(2015\)568343_EN.pdf](http://www.europarl.europa.eu/RegData/etudes/IDAN/2015/568343/EPRS_IDA(2015)568343_EN.pdf)

4.1. International Tourism Trends

The contribution of tourism to economic well-being depends on the quality and the revenues of the tourism offer. UNWTO assists destinations in their sustainable positioning in ever more complex national and international markets.⁸¹ As the UN agency dedicated to tourism, UNWTO points out that particularly developing countries stand to benefit from sustainable tourism and acts to help make this a reality.⁸²

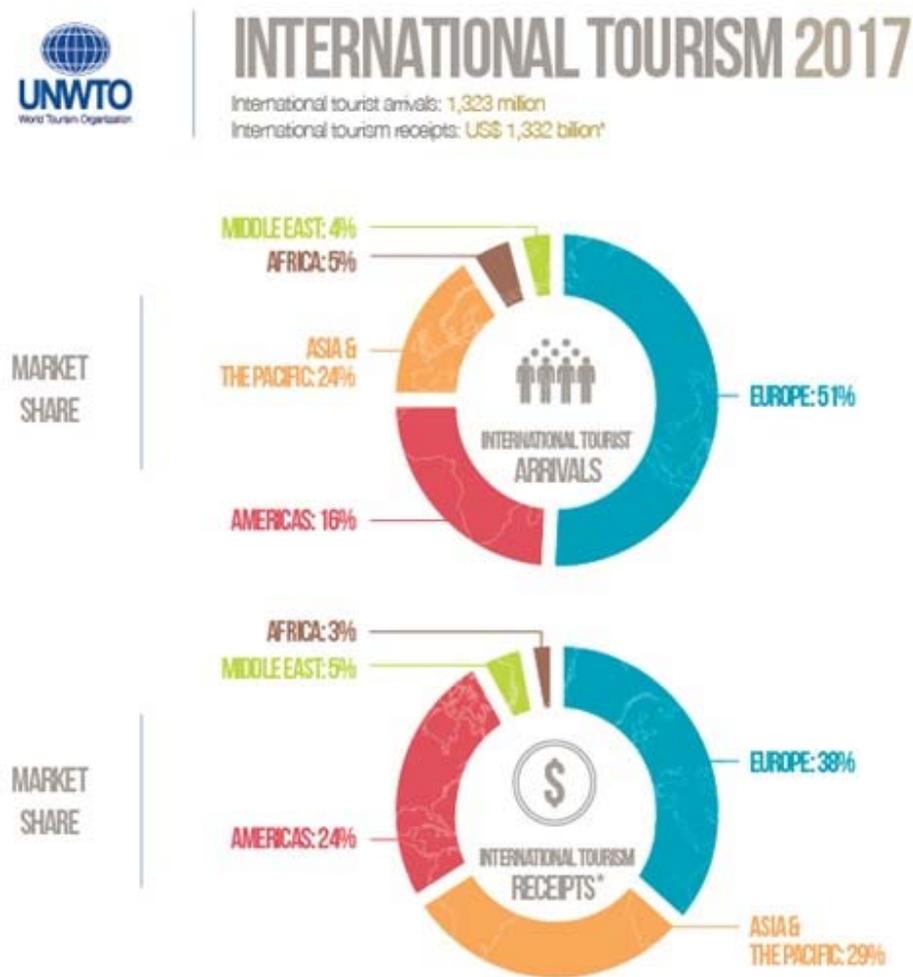


Figure 1 International Tourism 2017⁸³

⁸¹ UNWTO Tourism Highlights 2018.

⁸² Ibid.

⁸³ UNWTO, Barometer, 2018 –World Tourism Organisation (UNWTO), June 2018.

Current developments and forecasts⁸⁴

- International tourist arrivals grew by 7 % in 2017 to 1,323 million
- In 2017, international tourism generated US\$ 1.6 trillion in export earnings
- UNWTO forecasts a growth in international tourist arrivals of between 4% and 5% in 2018
- By 2030, UNWTO forecasts international tourist arrivals to reach 1.8 billion (UNWTO Tourism Towards 2030).

UNWTO's long-term outlook *Tourism Towards 2030* shows that there is still a substantial potential for further expansion in coming decades. Both existing and new destinations can benefit from this opportunity, provided they do the necessary to ensure the right conditions with regard to the **business environment, infrastructure and travel facilitation**.⁸⁵

For the 28 destinations of the European Union, tourism will continue to show growth, yet, its rate of growth will be modest compared with that of other regions, albeit on an already very large base. In order to stay competitive and tap into the potential demand, it is essential to continue creating and raising awareness and to mainstream tourism in the political agenda. Most of the EU destinations have a strong tradition in tourism and a great professionalism and can count on a highly developed tourism sector underpinned by some very strong assets.⁸⁶

However, sufficient challenges remain with regard to sustainability, infrastructure, accessibility, travel facilitation, changing consumer trends and governance, and these need to be addressed to guarantee successful future tourism development.

⁸⁴ UNWTO, *Annual report, 2017*.

⁸⁵ UNWTO, *Tourism towards 2030, Global Overview, September 2012, Quito, Ecuador*. http://cf.cdn.unwto.org/sites/all/files/pdf/comecuadorfinarevisado12030_e_web.pdf

⁸⁶ UNWTO, *European Union, Tourism Trends, 2016*. <https://www.e-unwto.org/doi/pdf/10.18111/9789284419470>



Figure 2 Why Tourism Matters⁸⁷

4.1.1. Cultural preservation

The sustainable tourism strategy is currently being revised with new targets for 2030. The priorities are to increase value, to achieve high and sustainable economic growth, alleviate poverty, address income disparities, create productive jobs and increase gender equality. The strategy seeks to address the challenges and achieve its targets through landmark reforms and investments.

⁸⁷ UNWTO, *Tourism Highlights*, 2018.

Initiatives, *inter alia*, include sustainability through establishing eco-principles and a “green” tourism unit and cultural heritage preservation.⁸⁸

The taking into account of the economic dimension of the heritage, as an issue of development and support for development policies, is relatively recent. This evolution is mainly due to the rapid growth of tourism (almost one billion international tourists worldwide in 2010, including 15% for cultural tourism) that runs through this area very directly (ticket, spending on sites), indirect (expenditure close to the sites, transportation) and induced (spending on equipment and services close to the sites).⁸⁹

4.1.2. Environmental protection

Tourism puts enormous stress on local land use, and can lead to soil erosion, increased pollution, natural habitat loss, and more pressure on endangered species. These effects can gradually destroy the environmental resources on which tourism itself depends. Tourism puts enormous stress on local land use, and can lead to soil erosion, increased pollution, natural habitat loss, and more pressure on endangered species. These effects can gradually destroy the environmental resources on which tourism itself depends. Tourism contributes to more than 5 percent of global greenhouse gas emissions, with transportation accounting for 90 percent of this. Eco-tourism is a rapidly growing industry, with potential benefits for both the environment and the economies of the tourist destinations.

The 2017 UN Declaration of **International Year of Sustainable Tourism for Development** should be used to raise awareness of the major contribution of tourism in tackling an array of global environmental and social issues, and to showcase how these challenges are being addressed by government, industry, civil society and individuals. Governments should create an enabling environment for multi-stakeholder cooperation aimed at advancing resource efficiency, and shared value and accountability.⁹⁰

⁸⁸ OECD *Tourism Trends and Policies 2018*, p. 332. Available at <http://www.thinktur.org/media/TENDENCIAS.pdf>.

⁸⁹ Valeri Patin, *The economy of cultural tourism and the preservation of heritage*, 2012. http://www.cultureindevelopment.nl/News/Discussing_Culture_and_Development/1421/The_economy_of_cultural_tourism_and_the_preservation_of_the_heritage

⁹⁰ <https://www.e-unwto.org/doi/pdf/10.18111/9789284419807>

4.1.3. Peace and security

Tourism can help support peace by putting pressure on governments to cease fighting – whether on an international front or domestically - in order to attract tourists. This is particularly important if tourism is an important sector for an economy.

Tourism has often been recognized for its ability to drive peace, security and understanding. Many world leaders have highlighted the importance of the sector, which supports 10% of global GDP and 1 in 11 of the world's jobs, not only as an economic force but also a force for good.

However it is widely argued that travel promotes cultural interchange and understanding, which brings people together and in turn creates more peaceful societies, there's little empirical evidence to support these views. The research conducted by the World Travel and Tourism Council (WTTC) and the Institute of Economics and Peace (IEP) explores links between tourism and peace, showing that countries with strong tourism sector tend to be more peaceful:⁹¹

- a) The clearest link between tourism and peace can be found in the area of positive peace. An open and sustainable tourism sector means a higher level of positive peace: namely, the attitudes, institutions and structures that create and sustain peaceful societies;
- b) Countries with an open and sustainable tourism sector are more likely to enjoy higher levels of positive peace in the future;
- c) The more sustainable the country's tourism sector is, the lower the country's level of violence and conflict is likely to be;
- d) In non-conflict-affected countries, tourism is resilient to increases in violence and conflict;
- e) Tourism is resilient to increase in terrorism, even when terrorism is targeted at tourists.

4.1.4. Employment and Economic growth

⁹¹ World Travel and Tourism Council, *Tourism as a driver of Peace, full report 2016*, available at <https://sp.wttc.org/-/media/files/reports/special-and-periodic-reports/tourism-as-a-driver-of-peace--full-report-copyrighted.pdf>

Tourism helps develop bonds between societies well as creating jobs. In the European Union, tourism contributes 10% to EU GDP and creates jobs for 26 million people – through its direct, indirect and induced effects in the economy – in particular for young people, women and people from a migrant background. Europe is maintaining its leadership in the global tourism market. Recent events have not prevented tourism from maintaining its position and becoming one of the fastest growing sectors in the European economy, thereby demonstrating its remarkable resilience and flexibility.⁹²

Travel and Tourism direct GDP contribution in Europe reached \$696 billion in 2016. This is greater than the GDP contribution of every other sector for the construction, financial services and retail sectors. Travel and Tourism is nearly 70% the size of Europe’s retail sector. Including its indirect and induced impacts, travel and tourism generated \$2.0 trillion in GDP, exceeding that of Europe’s mining, agriculture, banking, chemicals manufacturing, and automobile manufacturing sectors. Travel and Tourism generated, either directly or indirectly, 9.7% of Europe’s employment in 2016. For every job directly in tourism sector, nearly two additional jobs are created on an indirect or induced basis, making its linkages stronger than in the construction and agriculture sectors.⁹³

In 2017 Travel & Tourism directly supported 12,000 jobs (1.6% of total employment). This is expected to rise by 3.7% in 2018 and rise by 1.3% pa to 14,000 jobs (1.8% of total employment) in 2028. In 2017, the total contribution of Travel & Tourism to employment, including jobs indirectly supported by the industry was 6.1% of total employment (44,500 jobs). This is expected to rise by 3.6% in 2018 to 46,000 jobs and rise by 1.5% pa to 54,000 jobs in 2028 (7.0% of total).⁹⁴

4.2. European Tourism Trends

Tourism is well recognized for playing a key role in global economic activity, job creation, and as a source of export revenue and domestic value added. On average, tourism directly

⁹² European Commission, https://ec.europa.eu/growth/sectors/tourism_en.

⁹³ World Travel and Tourism Council, *Benchmark Reports, Regional Reports Europe Summary, 2016*, available online <https://www.wttc.org/economic-impact/benchmark-reports/>.

⁹⁴ World Travel & Tourism Council, *Travel and Tourism, Economic Impact, 2018*, p. 1. Available at <https://www.wttc.org/-/media/files/reports/economic-impact-research/countries-2018/NORTH MACEDONIA2018.pdf>

contributes 4.2% of GDP, 6.9% of employment and 21.7% of services exports to OECD countries, all of which are stable or slightly higher than figures for 2014.⁹⁵ Globally, inbound tourist arrivals (overnight visitors) grew to over 1.2 billion in 2016, an increase of 46 million (3.9%) on the previous year.⁹⁶ This figure is forecast to reach 1.8 billion by 2030, with international tourist arrivals in emerging economy destinations projected to grow at double the rate of advanced tourism economies. As a result, the market share of emerging tourism economies is expected to increase from 45% in 2016 to 57% over the same period. OECD member countries continue to play a prominent role in international tourism, accounting for just over half (55%) of total global arrivals in 2016 (up from 54% in 2014).⁹⁷ After increasing at a faster rate than global arrivals in 2014 (6.4% compared to 4.2% globally), the average growth in international arrivals for OECD members reduced to 3.9% in 2016 (compared to 3.9% globally and 4.7% for the EU28).

Despite the OECD rolling four year average annual growth rate of 4.9% slightly exceeding the global average, the 2016 figure is more reflective of the longer-term trend of a slowdown in arrivals to the OECD relative to tourism worldwide, resulting in a loss of market share. More specifically, 14 OECD countries recorded double digit annual growth in 2016, with four in excess of 20% – Chile (26%), Iceland (39%), Japan (21.8%), Korea (30.3%) – while Belgium, Latvia and Turkey all experienced retractions of more than 10%. International arrivals grew by 10% or more in eight OECD partner countries (Bulgaria, Colombia, Costa Rica, Lithuania, Malta, Philippines, Romania, South Africa).⁹⁸

Tourism is important for many countries and regions. The year of 2017 has been an extraordinary year for tourism in the EU, with an 8% growth compared to 2016, exceeding the worldwide average. Member States together reported 538 million international tourist arrivals last year, accounting for 40% of the world's total.⁹⁹ This is the eighth consecutive year of sustained growth for tourism in the EU. Tourism is a diverse sector with multiple needs; it requires targeted support at all levels to remain competitive in the face of increased competition from destinations

⁹⁵ World Trade Organization, *World Trade Statistical Review*, 2018. Available at: https://www.wto.org/english/res_e/statis_e/wts2018_e/wts2018_e.pdf

⁹⁶ UNWTO, *Tourism Highlights*, 2017 Edition.

⁹⁷ OECD *Tourism Trends and Policies 2018*. <https://www.oecd.org/cfe/tourism/2018-Tourism-Trends-Policies-Highlights-ENG.pdf>

⁹⁸ OECD *Tourism Trends and policies 2016*, available at <http://www.thinktur.org/media/TENDENCIAS.pdf>.

⁹⁹ European Travel Commission, *Quarterly Report – Q4/2017: Trends and Prospects*. https://etc-corporate.org/uploads/reports/ETC-Quarterly-Report-Q4-2017_Final-Public.pdf

outside the EU. Boosting investment, supporting SMEs, exploiting the opportunities of the digital economy and collaborative economy, and equipping tourism professionals with the right skills are only some of the areas that we focus on within the EU. Understanding the potential of European tourism – along with its challenges and trends – is indispensable in shaping appropriate and forward-looking policies in a continuously changing environment. But effective policies can only rely on sound evidence. And that is why this report is so timely. It provides a broad range of information on the current state of affairs and a look into the future by placing the EU within the global context. It will help those promoting tourism destinations or developing market strategies to find the insight they need.

Over the past decades, tourism has become a key driver of socio-economic progress through the generation of jobs, export income and infrastructure development for many destinations around the world. Since the end of World War II, international tourist arrivals (overnight visitors) worldwide have experienced continued growth, reaching 1,239 million in 2016, compared to 25 million arrivals in 1950. These arrivals generated euro 1,108 billion in international tourism receipts in 2016. For analyzing the international tourism on an aggregate level for the world and by UNWTO regions, including Europe, with the EU and the extra-EU groups of countries, two key indicators were used: international tourist arrivals (overnight visitors) and international tourism receipts, as compiled by UNWTO from data reported by destinations around the world.¹⁰⁰

¹⁰⁰ UNWTO Annual Report 2017. Available at : <https://www.e-unwto.org/doi/pdf/10.18111/9789284419807>



Figure 3 International Tourism 2016¹⁰¹

European tourism demand remains robust, continuing the trends observed earlier in the year. Despite a projected slowdown in the global economy, destinations in Europe saw solid growth that paved the way for an encouraging summer season. Year-to-date results have been mainly driven by strong intra-European and long-haul travel demand, increased air connections and destinations’ efforts to ensure year-round tourism growth.

Sustained growth has been recorded by all (33) reporting destinations, out of which one third saw growth in excess of 10%. Turkey (+33%) is enjoying a strong recovery – following a bleak 2016 and 2017 – as perceptions of risk weaken and the transcontinental destination opens to new markets and diversifies its offering.¹⁰²

¹⁰¹ World Tourism Organization (UNWTO), July, 2017

¹⁰² European Travel Commission, *European Tourism – Trends and Prospects, Quarterly Report – 2/2018*. Available at file:///C:/Users/moodle/Downloads/ETC_Quarterly_Report_Q2_2018%20(1).pdf

A mix of Balkan and island destinations also saw substantial increases from a wide range of source markets during the off-peak seasons. Croatia was up +27% trailed by Montenegro (+22%), the latter also benefitted from increased air routes connected to some of Europe's largest source markets. Arrivals growth in Malta (+18%) and Cyprus (+15%) appears to be fuelled also by the surge in cruise passengers.¹⁰³

Global travel demand continues to edge up even as airlines face increased fuel prices that may lead to higher fares. Air traffic growth across the Atlantic is expected to remain steady helped by a strong economic growth in the US despite volatile exchange rates rendering travel to parts of Europe less affordable. Year-to-date European RPK is up 6.6% behind that of Asia/Pacific (9.5%) which has been aided by increased air connectivity, and Latin America (7.0%).¹⁰⁴

European tourism continued the growth trend seen at the beginning of the year, and travel demand to the region is showing no signs of slowing down. Despite increased competition from fast-emerging destinations in Asia/Pacific, the region enjoyed a +7% increase in international tourist arrivals during the first four months of the year. Economic growth is projected to continue into 2018 for most source markets which will fuel further travel demand. ETC's forecast for 2018 remains positive with international tourist arrivals anticipated to increase at a more moderate pace by around 4.9%.¹⁰⁵

Although Europe has started to feel the pinch from the slowing global economy through weaker exports, tourism growth has continued into the second quarter of 2018; all 33 reporting destinations indicated growth in either arrivals or overnights.

For now, the economic growth in Europe remains strong enough to support continued intra-European demand. But the effects of slower global economic are more apparent in growth trends from long-haul source markets with a higher than usual number of destinations reporting declines from long-haul markets. However, on the whole, long-haul growth to Europe is still fairly fast-paced.

¹⁰³ *Ibid.*

¹⁰⁴ *European Travel Commission, European Tourism in 2018: Trends & Prospects (Q2/2018)*. [http://www.etc-corporate.org/reports/european-tourism-2018-trends-and-prospects-\(q2-2018\)](http://www.etc-corporate.org/reports/european-tourism-2018-trends-and-prospects-(q2-2018))

¹⁰⁵ *Ibid.*

The data related to 2018 indicate significantly slower tourism growth compared to prior years for a selection of countries. Year-to-date arrivals growth to Spain and Portugal based on data to April was significantly slower than average annual growth since 2012 of 7.3% and 10.8% respectively. Declines were reported from a number of large European source markets including Germany and the UK. In absolute terms these falls are significant given the short-haul share of travel demand for these destinations. By contrast, Turkey has enjoyed a massive influx in both German and British visitors. This mirrors the situation in previous years when travel to Spain and Portugal was thriving at the expense of Turkey due to safety and security concerns.¹⁰⁶

Table 1 Tourism Performance, 2018 Year-to-Date

Country	International Arrivals		International Nights	
	% ytd.	to month	% ytd.	to month
Austria	5.0	Jan- April	4.6	Jan- Apr
Belgium	8.4	Jan- Feb	7.3	Jan- Feb
Bulgaria	11.5	Jan- April		Jan- April
Croatia	26.9	Jan- Mar	29.4	Jan- Mar
Cyprus	14.5	Jan- May	21.0	Jan- Apr
Czech Rep.	10.6	Jan- Mar	7.9	Jan- Mar
Denmark			2.7	Jan- Apr
Estonia	2.8	Jan- April	5.1	Jan- Apr
Finland	7.9	Jan- Mar	6.6	Jan- Apr
Germany	5.1	Jan- Mar	5.9	Jan- Mar
Greece	12.8	Jan- Mar		
Hungary	3.1	Jan- April	3.3	Jan- Apr
Iceland	5.6	Jan- May		
Ireland Rep.	7.3	Jan- April		
Italy	0.0	Jan- Mar	1.3	Jan- Mar
Latvia	15.3	Jan- Mar	14.3	Jan- Mar

¹⁰⁶ European Travel Commission, Quarterly Report Q2 2018. [http://www.etc-corporate.org/reports/european-tourism-2018-trends-and-prospects-\(q2-2018\)](http://www.etc-corporate.org/reports/european-tourism-2018-trends-and-prospects-(q2-2018))

Lithuania	7.7	Jan- Mar		Jan- Apr
Luxembourg			1.4	Jan- Apr
Malta	18.1	Jan- Apr	17.9	Jan- Apr
Monaco	-1.3	Jan- Apr	3.9	Jan- Apr
Montenegro	22.1	Jan- Apr	16.7	Jan- Apr
Netherlands	11.0	Jan- Feb	10.6	Jan- Feb
Norway			8.0	Jan- Apr
Poland	9.6	Jan- Apr	11.9	Jan- Apr
Portugal	3.6	Jan- Apr	1.0	Jan- Apr
Romania	6.7	Jan- Apr		Jan- Apr
Serbia	11.1	Jan- Apr	11.9	Jan- Apr
Slovakia	6.4	Jan- Mar	7.0	Jan- Mar
Slovenia	13.6	Jan- Apr	16.6	Jan- Apr
Spain	2.3	Jan- Apr	-0.3	Jan- Apr
Sweden			8.8	Jan- Apr
Switzerland	1.8	Jan- Apr	2.1	Jan- Apr
Turkey	32.5	Jan- Apr		Jan- Apr

Source: TourMis, http://www.tourmis.info/index_e.html

European travel growth was particularly strong in 2017, partly helped by the synchronized global economic upturn, but also including a rebound from weaker demand in 2016. European demand growth was stronger than for all other global destinations.

Short-haul travel made a significant contribution to this growth, offsetting the weaker 2016, but also benefitting from the booming Eurozone economy. Economic growth strengthened throughout 2017 and became more broad-based, including expansion in investment with momentum set to continue into 2018.

The majority of reporting European destinations experienced strong growth in travel from Germany. Cyprus reported the largest influx in German arrivals based on full year data for 2017, 52.2% higher than in 2016. Overnights by Germans in Cyprus were also significantly higher. However, overnights growth is based on data to October only. An increasing number of German arrivals and overnights was also reported in a number of southeast European destinations including Montenegro, Slovenia, and Serbia, helped by improved air connectivity to the region. The traditionally large destination markets of Spain and Italy reported declining arrivals and overnights

respectively. However, Spain's decline in arrivals was offset by overnights growth and Italy's decline in overnights was offset by arrivals growth. Arrivals to Turkey fell 8.2% in 2017 to date; a significant drop given that Germany is its largest source market.¹⁰⁷

European tourism marked 2016 as the seventh consecutive year of growth. The most visited region in the world welcomed 620 million international tourist arrivals last year, a modest but welcome 2% increase compared to 2015. Overall, Europe proved incredibly resilient to safety and security challenges. Encouragingly, despite political turmoil tourists wish to continue exploring the region. Prospects remain positive with tourist flows to Europe expected to increase by around 3% in 2017.¹⁰⁸

Continued growth was reported in 28 out of 32 European destinations towards the end of 2016, which was offset by falls in others. Iceland's stunning growth (+40%) is followed by that of Cyprus (+20%), Slovakia (+19%) and Bulgaria (+16%). Improved air connectivity, targeted and off-season marketing efforts and increased visitor share at the expense of Turkey are some of the growth-drivers in Cyprus and Slovakia. Other destinations achieving record growth include Serbia and Portugal (both +13%), with both destinations appealing to bargain hunters and benefitting from being perceived as secure countries.¹⁰⁹

4.3. European Tourism Trends in EU-28 member-states: current situation and forecasts

In the EU economy, tourism is a crucial economic engine and job creator. The EU has a well-developed tourism sector that caters for substantial demand, both domestic and international, with the latter representing 40% of the world's international tourist arrivals and 31% of international receipts. According to data from Eurostat, EU tourism industries comprised 2.3 million enterprises in 2014, most of them small and medium sized enterprises (SMEs). Enterprises

¹⁰⁷ European Travel Commission, *Quarterly Report Q4 2017*. [http://www.etc-corporate.org/reports/european-tourism-2017-trends-and-prospects-\(q4-2017\)](http://www.etc-corporate.org/reports/european-tourism-2017-trends-and-prospects-(q4-2017)).

¹⁰⁸ European Travel Commission, *Quarterly Report Q4 2016*. [http://www.etc-corporate.org/reports/european-tourism-2016-trends-and-prospects-\(q4-2016\)](http://www.etc-corporate.org/reports/european-tourism-2016-trends-and-prospects-(q4-2016)).

¹⁰⁹ *Ibid.*

in industries with tourism-related activities employed some 12 million people in the European Union, equivalent to 9% of total employment in the non-financial business economy.¹¹⁰

Tourism furthermore contributes significantly to the balance of payments, accounting for 6% of the EU's overall exports of goods and services and 22% of its services exports in 2016.

This represents the economic impact of European tourism:

- Tourism represents 10% of GDP of the European Union
- 12 million people employed equivalent to 9% of EU employment
- 6% of EU overall exports and 22% of services exports
- 27 billion euros surplus in the travel trade balance¹¹¹

Tourism is a people's sector in all its aspects and dimensions. However, data on tourism-related to employment is still fragmented, lacks quality and international comparability. This is the case not only at the international level, but also at the national level where different methods and sources often result in different figures and results. Enhancing the quality and comparability of tourism employment statistics would significantly improve the monitoring of tourism labour markets and the promotion of productive activities, as well as the effective use of qualified labour, the principal factor in ensuring sustainable tourism development and its contribution to economic growth and employment.

UNWTO projected international arrivals in the European Union to grow at a rate of 1.5% a year between 2010 and 2030, as reported in International tourism trends in EU-28 member states, current situation and forecasts for 2020-2025-2030, published in 2014.¹¹²

- global growth projections: international arrivals in the EU are expected to grow 2.3% a year until 2020 and 1.5% a year until 2030. Emerging economy destinations are generally expected to grow faster than advanced economy destinations given their higher development potential. The seven emerging economy destinations in the EU were forecast to grow an average 4.0% a year through 2020, compared to 2.1% a year in the case of the 21 advanced economy destinations. Considering that two of those emerging economies are now categorized by the IMF as advanced

¹¹⁰ UNWTO, *European Union Tourism Trends*, 2018. <https://www.e-unwto.org/doi/pdf/10.18111/9789284419470>

¹¹¹ European Commission 2014-2019, *European Tourism as a driving force for economic growth and job creation*. <file:///C:/Users/moodle/Downloads/European%20tourism%20as%20a%20driving%20force%20for%20economic%20growth%20and%20job%20creation%20-%20European%20Commission%202014%20-%202019.pdf>

¹¹² file:///C:/Users/moodle/Downloads/UNWTO_TT2030_EU28%20final%20version.pdf

economies (Latvia and Lithuania), the now five emerging economy destinations have grown an average of 7% a year between 2010 and 2016.

- also international arrivals from markets outside the EU are expected to grow at a faster rate than from EU markets.

4.4. OECD Tourism Trends and Policies 2018

OECD Tourism Trends and Policies 2018 explores the impacts and relevance of megatrends for tourism to 2040. It underlines the need for countries to develop strategic approaches to adapt in an increasingly dynamic environment, as well as modernize regulatory and legislative frameworks, building on broad stakeholder engagement and taking account of new and innovative business approaches to service delivery.

Tourism has an important role to play in the transition to a green economy and that an in-depth analysis of megatrends can help policymakers to bring currently unforeseen and emerging issues onto the strategic policy agenda. It highlights that a shift to more coherent and comprehensive approaches to tourism policy development will help reframe tourism growth to better spread the benefits, address inequalities, and improve the resilience of economies.

- Develop a better understanding of tourism's contribution to well-being and inclusive growth, and provide governments with coherent policy advice on how to deliver a fairer distribution of benefits to society as a whole.

- Continue to work with governments and other international organizations to identify and share effective approaches to delivering integrated policy responses that promote sustainable and inclusive tourism growth.

- Enhance dialogue with the private sector, to better incorporate the essential perspective of industry in the development and implementation of tourism policy.

- Support the development of innovative tourism policies that contribute to the 2030 Agenda for Sustainable Development and result in enhanced economic, social and environmental outcomes.

- Contribute to the development of policies and programs to spread the benefits of tourism to regions and local communities.

- Work with governments to provide an environment to encourage the creation and growth of small-scale tourism businesses, stimulate innovative product development, generate quality employment, support local communities, and integrate SMEs into global value chains.

- Work with governments and other relevant international organizations to further improve the quality and accessibility of tourism statistics, strengthen the evidence base, enhance policy and programme evaluation methodologies, and more effectively demonstrate the economic value of tourism to decision makers, in a timely and robust manner.¹¹³

4.5. Policies and prospects for developing the CBC- North Macedonia and Albania

The region of Lake Ohrid region (Ohrid and Struga), Debar, Vevchani, Zupa region, Mavrovo-Rostushe in North Macedonia has good tourism potential, but it lacks an adequate approach towards planning and management of tourism development in the country. The total contribution of travel and tourism to the country's GDP, employment, and total capital investment in 2017 was fair (6.6%, 6.1%, and 2.4%, respectively) in comparison with other countries in the region.¹¹⁴ Leisure travel spending (inbound and domestic) generated 66.8% of direct Travel & Tourism GDP in 2017 compared with 33.2% for business travel spending. Domestic travel spending generated 44.2% of direct Travel & Tourism GDP in 2017 compared with 55.8% for visitor exports (i.e. foreign visitor spending or international tourism receipts). The number of tourists increased by 16.6% in 2017 compared to 2016, the number of domestic tourists increased by 6.3%, while that of foreign tourists increased by 23.5%. The number of nights spent increased by 12.8% in the same period, the number of nights spent by domestic tourists increased by 5.2%, while those by foreign tourists increased by 22.8%. Capital city Skopje and UNESCO-protected Ohrid, ski and resorts such as Mavrovo remain the key tourist attractions in the country, complemented by rural, alternative and cultural heritage tourism. The country needs comprehensive approach and streamlined action in the sector Tourism where several actions are implemented over the past year and will continue in the following one. Increasing the tourism and hospitality capacities as well as improving their quality and efficiency are challenges that are

¹¹³ OECD Tourism Trends and Policies 2018, available at DOI: <https://doi.org/10.1787/tour-2018-en>

¹¹⁴ Ibid.

expected to be overcome by the new Tourism Strategy that is currently in government procedure. Moreover, all the analyses shows that tourism sector faces problems when it comes to clear and targeted promotions, capacities to absorb the incoming tourist and needs of better destination management approach.¹¹⁵

In 2017, North Macedonia generated MKD17.5bn in visitor exports. In 2018, this is expected to grow by 8.7%, and the country is expected to attract 651,000 international tourist arrivals. By 2028, international tourist arrivals are forecast to total 798,000, generating expenditure of MKD28.4bn, an increase of 4.1%¹¹⁶

Travel & Tourism is expected to have attracted capital investment of MKD5.5bn in 2017. This is expected to rise by 4.6% in 2018, and rise by 6.2% pa over the next ten years to MKD10.5bn in 2028. Travel & Tourism's share of total national investment will rise from 2.5% in 2018 to 3.3% in 2028.¹¹⁷

These are the activities planned in 2019:¹¹⁸

- Establishing process for destinations management,
- Implementation of large infrastructure and small investment sub-grants according to the grant scheme,
- Strengthen capacities for implementation of activities of key government institutions, as well as the private sector and civil society associations, in order to play an active role in tourism development,
- Improved access to international markets, improved destination management and improved tourism services.

These are the activities planned in 2020:¹¹⁹

¹¹⁵ Ministry of finance of North Macedonia, *Economic Reform Programme 2019-2021, Draft- Chapter 4, Structural Reforms*, 2019, p. 22. Available at <https://www.finance.gov.mk/files/Economic%20Reform%20Program%202019%20EN%20Nov%202018.pdf>

¹¹⁶ World Travel & Tourism Council, *Travel and Tourism –Economic Impact 2018 North Macedonia*, p. 5. Available at <https://www.wttc.org/-/media/files/reports/economic-impact-research/countries-2018/North Macedonia2018.pdf>

¹¹⁷ *Ibid*, p. 5

¹¹⁸ *Ibid*.

¹¹⁹ *Ibid*.

- Activities for financing infrastructure projects are expected to end in 2019. Activities for improving the quality of the tourist offer and tourist services are expected to continue in 2020 with the start of the second phase of the project for increasing market employability. And activities planned in 2021 are the second phase of the project for increasing market employability is expected to begin.

Expected results are oriented towards local economic growth, but also to improving productivity, service quality, connections and innovation.

Also new jobs will be created along the whole tourism value and supply chain and it is expected higher participation of young people and women. Also actions will produce spillover effect to other industries and sectors in their further growth and development, such as education, trade, transport, etc. Also strengthening the capacities for implementation of the activities of the key government institutions, as well as the private sector and civil society organizations in order to play an active role in the development of tourism in North Macedonia. Improved access to international markets (the Ohrid destination to build at the export level).

According to the National Strategy Plan for tourism development, eight key strategies are defined to support sustainable tourism development of the regions:¹²⁰

- Raising awareness of the region as an attractive tourist destination;
- Improving the attractiveness of the region as a tourist destination;
- Improving organizational structures in tourism;
- Improving the investment climate for the region entrepreneurs in terms of the development of additional accommodation facilities;
- Improving the quality and quantity of available tourism data;
- Improving the framework conditions for tourism development;
- Improving tourist knowledge and quality of services;
- Improving the awareness of the local population in terms of tourism.

The Government of the country gave priority to the improvement of the socio-economic development through job creation and growth. Government specifically emphasized the tourism

¹²⁰ *National Strategy for Tourism Development in North Macedonia. Available at [http://www.economy.gov.mk/Upload/Documents/BER_Tourism%20Strategy%20NorthMacedonia_DRAFT_16%2001%2021_MK%20\(1\)%20\(3\).pdf](http://www.economy.gov.mk/Upload/Documents/BER_Tourism%20Strategy%20NorthMacedonia_DRAFT_16%2001%2021_MK%20(1)%20(3).pdf)*

sector as one of those that can and help the country achieve its development goals, mainly through its contribution to local economic development and by reducing differences in wealth between the regions.

The Government gave priority to the improvement of the socio-economic development through job creation and growth. Government specifically emphasized the tourism sector as a sector that can help the country to achieve its development goals, especially through its contribution towards local economic development and the reduction of wealth differences between the regions. Success achieved through the development of tourism most often leads to job creation, private investment and more consumption by visitors in certain destinations. In this context, several international organizations operate in the Republic of North Macedonia and NGOs, including the World Bank Group (WBG) and the European Union (EU).

As for the regions of Mat, Diber, Bulquze and Klos in Albania, the country highly maximizes the sectors potential and grows tourism in a way that is sustainable: culturally, socially, environmentally and economically. Therefore, the tourism strategy should focus on:

- assisting the sector to manage growth in a way that ensures long-term sustainability
- providing ways manage conflicts between increasing tourism growth and environmental, social and cultural values that are important to Albania and its visitors
- providing the appropriate structure within which industry investment and profitability can be facilitated and maximized (clear responsibilities and cooperation)
- reducing overlaps and gaps within the sector
- securing commitment and funding to tourism from central and local government
- making it easier for operators and investors to do business in the sector
- providing cohesion to strategic directions and strategies.

“Albania is a safe, high-value tourism destination featuring an unparalleled variety of world-class natural and cultural attractions in a small geographic area, managed in an environmentally and socially responsible manner, easily accessible to European tourism markets”¹²¹

¹²¹ “Toward a Strategy for Culture Tourism and Ecotourism Development.” Ministry of Tourism, Culture, Youth and Sport. November 2005.

Tourism growth can be slow in the early years. If successful, the sector will begin small, but grow rapidly as it gains a positive international reputation. While it will be possible to observe progress and measure advances with meaningful indicators, the tangible benefits critical for ongoing political support and commitment will be observed in the medium term. The concept of sustainability is built into the strategic position by necessity. Without aggressive efforts to ensure the sustainability of the natural and cultural resources, Albania cannot reasonably expect to maintain a market position capable of attracting international tourists. Without involving the local communities and providing real opportunities to participate in and benefit from the development process, the attractions will continue to be degraded, or converted to other economic uses – nearly all of which offer much less long-term development potential than tourism.

Cultural and heritage tourism plays an important role in the development of tourism industry in Albania. According to official data, the number of visitors to monuments of culture, castles, museums, archeological parks, and other sites in 2016 increased by 17.5 percent compared to 2015. Meanwhile, the data for 2017 will be available by the end of the year. Three out of the five sites inscribed in UNESCO heritage in Albania, Butrint, Berat, and Gjirokastra, are cultural sites. Meanwhile, authorities are *working on inscribing the Albanian part of Ohrid Lake* in UNESCO World Heritage sites.

“The Albanian part of Ohrid Lake is expected to be part of UNESCO World Heritage in 2019. This was confirmed at the conclusion of the Sixth Trans boundary Platform Meeting for the safeguarding of the Lake Ohrid Region that was held in the city of Pogradec on September 14-25.”¹²²

It’s a strategy recently developed by the Albanian Government for the coming years. This is a main platform associated with policies, reforms and measures in the tourism sector not only for the Government and the Ministry responsible for tourism. This strategy reflects the Government reform program in all sectors, with the aim to establish tourism in sustainable development directions and to cut the development chaotic path, unplanned and uncoordinated tourism.¹²³

¹²² *Cultural/Heritage Tourism Strategic Planning in Albania.*

https://econpapers.repec.org/article/dugactaec/y_3a2014_3ai_3a2_3ap_3a129-138.htm

¹²³ *Albanian National Tourism Strategy 2014-2020.*

According to the World Council for Tourism and Travel - WTTC, the direct contribution of tourism to the GDP in Albania was 81.4 billion Leke in 2011, which mines 6.2% of total GDP. In 2012 it would have been decreased in 5.6%. In 2013 its contribution to the GDP was 1 billion Leke, or representing 4.8% of it. During 2014, the direct contribution of tourism constituted 5.9% of the GDP, while during 2015 would have been decrease by 2.1% going back again into 3.8%.¹²⁴

The total contribution of Travel & Tourism to employment (including wider effects from investment, the supply chain and induced. By 2028, Travel & Tourism is forecast to support 344,000 jobs (27.3% of total employment), an increase of 1.3% pa over the period.¹²⁵

There are numerous advantages in the economy of a country coming from the tourism industry; some of their benefits are brought up in this study. The weight of the revenue from the tourism industry in the National GDP is increasing year after year. According to the WTTC, a significant increase is expected in the coming years as well.¹²⁶ The employment in the tourism sector is one of the economic benefits coming from this industry with an increasing trend of the job demand year after year, regardless the connection of the employment in enterprises operating directly or indirectly in the tourism industry. On the other hand, there have been investments undertaken by the private sector and by the government funds, which could be direct investments in the tourism sector (investment in the hospitality structures, accommodation, entertainment) or indirect investments in other sectors but in a certain way their service to the industry of tourism cannot be neglected (road infrastructure, airports, commodities in telecommunication, payments, safety in the Albanian territory in case of emergency).¹²⁷

The total contribution of travel and tourism to GDP, including indirect effects, is estimated at around 20%.¹²⁸ However, the sector faces numerous challenges linked to the lack of skills of tourism professionals, widespread informality, low accessibility of tourism services, the absence of a sustainable natural and cultural offer, and the lack of coordination and planning both within

¹²⁴ World Travel & Tourism Council, *Travel and Tourism –Economic Impact 2018 Albania*, p. 5. Available at <https://www.wttc.org/-/media/files/reports/economic-impact-research/countries-2018/albania2018.pdf>

¹²⁵ *Ibid.*

¹²⁶ WTTC, *Introduction Travel & Tourism Current and Future Growth*. <https://www.wttc.org/-/media/files/reports/2018/wttc--g20-jobs-creation-white-paper-en.pdf>

¹²⁷ World Travel & Tourism Council, *Travel and Tourism –Economic Impact 2018 Albania*,

¹²⁸ WTTC, *Travel and Tourism Economic Impact 2018 World*.

the sector and with other relevant sectors such as vocational education and training.¹²⁹ The link between tourism and preservation of natural and cultural heritage and urban requalification could represent an important source for economic growth and development particularly when well integrated with local territorial development.¹³⁰

¹²⁹ European Commission, ANNEX to the COMMISSION IMPLEMENTING DECISION , C(2018) 5027 final amending Commission Decision C(2014)5770 of 18.8.2014 adopting the Indicative Strategy Paper for Albania for the period 2014-2020. <https://ec.europa.eu/neighbourhood-enlargement/sites/near/files/20180817-revised-indicative-strategy-paper-2014-2020-for-albania.pdf>

¹³⁰ *Ibid.*

5. NEW OPPORTUNITIES FOR THE EUROPEAN TOURISM

The report on international tourism trends prepared by the World Tourism Organization concerning primarily the 28 EU-member states demonstrates consistent set of quantitative trends for the group of the 28 European Union countries (EU-28) compatible with UNWTO Tourism Towards 2030 (TT2030) long-term outlook.¹³¹ The report shows that there is still a substantial potential for further expansion of the tourism business in the EU in coming decades. Both existing and new destinations can benefit from this opportunity, provided they do the necessary to ensure the right conditions with regard to the business environment, infrastructure and travel facilitation.

By 2025, about one-third of international arrivals will be in one of the EU-28 destinations (33%), down from 40% in 2010 and 56% in 1980. To an extent this is a natural process with still lesser developed destinations catching up, and with emerging outbound markets driving growth in destinations within the same region (as the majority of travelers in for instance the rapidly growing Asian outbound markets is heading for intraregional destinations, Asia will grow faster than Europe, even if Europe would maintain its share in this market).¹³²

In order to stay competitive and tap into the potential demand, it is essential to continue creating and raising awareness and to make tourism a mainstream topic on the political agenda.

Most of the EU destinations have a strong tradition in tourism and a great professionalism and can count on a highly developed tourism sector underpinned by some very strong assets.

5.3.Promoting the digitalization of the tourism SMEs

Tourism sector has been fundamentally transformed by increased use of modern technologies throughout the entire value chain. This is accompanied by the emergence of new types of actors and data-driven business models as well as changes of the consumer behaviour.

Technological cooperation in the field of tourism aims at reducing the cost of producing tourist services, improving their quality, strengthening the infrastructure and promoting technological self-sufficiency. It, therefore, increases the contribution of tourist activities to the

¹³¹ *International Tourism trends in EU-28 member-states – Current situation and forecast for 2020-2015-2030, UN World Tourism Organization 2016.*

¹³² *Ibid.*

development process. Adequate and equitable technological cooperation avoids the recurrence of mechanisms of underdevelopment, income imbalance and dependence. The transfer of technology should be carried out in a planned way, so as to enable its assimilation by the receiving countries without causing a break between tradition and innovation. Technology transfer may have detrimental effects or may not attain the objectives desired if it is not carried out under appropriate conditions and in a human environment suitable and appropriate for receiving and assimilating it. States must make it their essential concern to ensure that in all technology transfers the preliminary conditions required for its acceptance in the human environment are present.¹³³

Nevertheless states have to take into account, in their choice of technologies in the field of tourism, the need to adapt them to local circumstances the importance of harmonizing the various local and foreign technologies, the need for such technologies to be based on well-tested, applied techniques, and the dynamism and rapid evolution of technology. However it stresses the value for developing countries to rely on human and other resources available in their own countries to facilitate the transfer and absorption of technology as part of a global development strategy.

5.4. Promoting sustainable and responsible tourism, among other through adoption of a Charter for Sustainable and Responsible Tourism

Increasingly, destinations and tourism operations are endorsing and following "responsible tourism" as a pathway towards sustainable tourism. Responsible tourism and sustainable tourism have an identical goal, that of sustainable development. The pillars of responsible tourism are therefore the same as those of sustainable tourism – environmental integrity, social justice and economic development.¹³⁴ The major difference between the two is that, in responsible tourism, individuals, organizations and businesses are asked to take responsibility for their actions and the impacts of their actions. This shift in emphasis has taken place because some stakeholders feel that insufficient progress towards realizing sustainable tourism has been made since the Earth Summit in Rio. This is partly because everyone has been expecting others to behave in a sustainable manner. The emphasis on responsibility in responsible tourism means that everyone

¹³³ *Compilation of UNWTO Recommendations 1975-2015, World Tourism Organization (UNWTO), march, 2016., p. 13. Available at <https://www.e-unwto.org/doi/book/10.18111/9789284417797>.*

¹³⁴ *Apollo, Michal (2018). "Ethics in tourism as a key to development, prosperity and well-being of all stakeholders: 3rd International Congress on Ethics and Tourism, Krakow, 27–28 April 2017". International Journal of Environmental Studies. 75 (2): 361–365*

involved in tourism – government, product owners and operators, transport operators, community services, NGOs and Community-based organization (CBOs), tourists, local communities, industry associations – are responsible for achieving the goals of responsible tourism.

The world's most visited region Europe, marks 2017 as the eighth year in a row of sustained growth in:¹³⁵

- Arrivals grew 8% in 2017, 52 million more than in the previous year.
- Growth in arrivals was mirrored by receipts which also increased 8%.
- Travel demand increased from virtually all Europe's source markets, both inside and outside the region, fuelling inbound growth across Europe. The recovery of the Russian outbound market in particular, benefitted many destinations.
- By subregion, Southern Mediterranean Europe led results in arrivals and receipts, driven by the recovery of Turkey and the continued strength of other traditional and emerging destinations. Italy and Spain reported an increase of six million arrivals each.
- In Western Europe, growth was led by top destination France and Belgium, recovering from the security incidents in previous years.
- Destinations in Central and Eastern Europe also posted solid growth with a few exceptions, thanks to increased outbound demand from Russia.
- All destinations in Northern Europe reported growth, including the United Kingdom, the subregion's largest destination, despite the terrorist attacks in London and Manchester. The depreciation of the British pound contributed to the UK's results, making the destination more affordable.

Responsible tourism is regarded as a behavior. It is more than a form of tourism as it represents an approach to engaging with tourism, be that as a tourist, a business, locals at a destination or any other tourism stakeholder. It emphasizes that all stakeholders are responsible

¹³⁵ *UNWTO Tourism Highlights: 2018 Edition.*

for the kind of tourism they develop or engage in. Whilst different groups will see responsibility in different ways, the shared understanding is that responsible tourism should entail an improvement in tourism. Tourism should become ‘better’ as a result of the responsible tourism approach.¹³⁶

Within the notion of betterment resides the acknowledgement that conflicting interests need to be balanced. However, the objective is to create better places for people to live in and to visit. Importantly, there is no blueprint for responsible tourism: what is deemed responsible may differ depending on places and cultures. Responsible Tourism is an aspiration that can be realized in different ways in different originating markets and in the diverse destinations of the world.¹³⁷

There are many private companies who are working into embracing the principles and aspects of Responsible Tourism, some for the purpose of Corporate Social Responsibility activities, and others such as Sustainable Visit, responsibletravel.com, Fair Travel, and World Hotel-Link, which was originally a project of the International Finance Corporation, have built their entire business model around responsible tourism, local capacity building and increasing market access for small and medium tourism enterprises.

The purpose of the Charter for Sustainable and Responsible Tourism is to encourage sustainable and responsible tourism policies and actions across Europe, and to promote these policies worldwide.¹³⁸

Digital developments present opportunities for governments to re-think not only how tourists experience their country and how citizens can benefit from enabling technologies, but also pose challenges for established operators and raise broader policy questions in areas such as employment, consumer protection, privacy and security, taxation and regulation.

Policy shapers need to consider the demand and supply-side implications of such development for tourism and develop policy responses involving key stakeholders. However, the current rate of technological change makes adjusting to technological change more difficult for both governments and industry.

¹³⁶ Apollo, Michal (2018). "Ethics in tourism as a key to development, prosperity and well-being of all stakeholders: 3rd International Congress on Ethics and Tourism, Krakow, 27–28 April 2017". *International Journal of Environmental Studies*. 75 (2): 361–365.

¹³⁷ Goodwin Harold., *Responsible Tourism*, 2002.

¹³⁸ http://www.ceeweb.org/wp-content/uploads/2011/12/Commented_Tourism_Charter_CEEweb.pdf

CONCLUDING REMARKS AND RECOMMENDATIONS

Europe is going toward a new regional prospective, regions have now become a major concern due to the ongoing development of the European Union; cross-border cooperation is central to continuing this process. In this context tourism has taken an important role. This sector was formally recognized by the Community (now European Union) with the Treaty of Maastricht in 1992. Article 3 introduces the "measures relating to energy, civil protection and tourism" in order to achieve the objectives set out in article 2 of the Treaty of European Union (TEU).¹³⁹

Tourism has become a global economic sector with a wide and significant impact on socio-economic and ecological development of regions and nations. Its importance has increased over the past decades, as a consequence of the rise in spending power in increasingly mobile consumers and households, the increasing accessibility of tourist regions or cities all over the world, the change in lifestyles and the trend towards internationalization in modern societies. Thus, today, it is one of the largest and fastest growing sectors in the world economy. It plays a key role in inclusive socioeconomic growth, provides sustainable livelihoods, fosters peace and understanding and helps to protect our environment. Tourism has become a key sector expanding the economic base of destination areas, stimulating foreign trade and exchange, and favoring employment in many branches of the economy.

Tourism is one of the world's fastest growing industries and is a major source of income for many countries. Being a people-oriented industry, tourism also provides many jobs which have helped revitalize local economies.

However, like other forms of development, tourism can also cause its share of problems, such as social dislocation, loss of cultural heritage, economic dependence and ecological

¹³⁹ Treaty of the European Union, 1992. Article 2: *The Community shall have as its task, by establishing a common market and an economic and monetary union and by implementing the common policies or activities referred to in Articles 3 and 3a, to promote throughout the Community a harmonious and balanced development of economic activities, sustainable and non-inflationary growth respecting the environment, a high degree of convergence of economic performance, a high level of employment and of social protection, the raising of the standard of living and quality of W, and economic and social cohesion and solidarity among Member States.'*

https://europa.eu/european-union/sites/europa.eu/files/docs/body/treaty_on_european_union_en.pdf

degradation. Learning about the impacts of tourism has led many people to seek more responsible holidays. These include various forms of alternative or sustainable tourism such as: ‘nature-based tourism’, ‘ecotourism’ and ‘cultural tourism’. Sustainable tourism is becoming so popular that some say that what we presently call ‘alternative’ will be the ‘mainstream’ in a decade. Also, cultural tourism is important for the tourism sector development. However, to achieve a sustainable improvement offered by tourism for growth, many tourism initiatives must be set in order to guarantee an ecologically efficient development in an age with increasing numbers of tourists.

All tourism activities of whatever motivation – holidays, business travel, conferences, adventure travel and ecotourism – need to be sustainable. **Sustainable tourism**, as a trend in tourism, is defined as “tourism that respects both local people and the traveler, cultural heritage and the environment”. It seeks to provide people with an exciting and educational holiday that is also of benefit to the people of the host country. The EU’s view of sustainable tourism is mainly expressed in the Lisbon strategy and in the Goteborg Summit. The new legal context shows the renewed European idea of Sustainable tourism, which is now considered as a tool to develop sustainability, thus ensuring the positive contribution of this sector in the long term. This process is mainly based on three main concepts: environmental, economic and social sustainability.

Despite the obvious opportunities presented by the expected growth trajectory, tourism faces a range of challenges, in particular: i) the complexity of tourism policy development due to its cross-cutting, multi-level, and fragmented nature, and competing policy priorities and budgetary limitations; ii) the impact of external factors on tourism, including macroeconomic conditions, exchange rates, safety and security, and natural disasters; iii) the global shift to a resource-efficient economy; and iv) the continued transformation of tourism services linked with emerging technologies and digitalization of the economy. Tourism, when built upon broad stakeholder engagement and sustainable development principles, can contribute to more inclusive growth through the provision of employment and economic development opportunities in both urban and rural areas, and promote social integration. Tourism can also raise awareness of cultural and environmental values, and help finance the protection and management of protected areas, and the preservation of biological diversity.

As the future of tourism is impacted by large-scale social, economic, political, environmental and technological changes, four “mega-trends” are identified to have serious impact

and relevance on tourism. Those are i) evolving visitor demands, ii) sustainable tourism growth, iii) enabling technologies, iv) travel mobility, and v) digitalization of the tourism sector.

Therefore, the significance of the tourism sector should be well recognized by governments, with clearly identified ministries or departments that are dedicated to its development, promotion and management. Government ministries and departments with responsibility for tourism are primarily engaged with setting tourism policy, directing its implementation, and overseeing the legislative and regulatory framework of the sector.

The cross-cutting and complex nature of tourism means that the sector relies on many areas of government policy and action. This requires a “**whole-of-government**” **approach**, involving ministries and local authorities with responsibility for transport, the environment, education and training, natural and cultural heritage, as well as the economy, business development, security and foreign affairs.

Increasingly, destinations and tourism operations in the EU are endorsing and following the “**responsible tourism**” as a pathway towards sustainable tourism. Responsible tourism and sustainable tourism have an identical goal, that of sustainable development. The pillars of responsible tourism are therefore the same as those of sustainable tourism – environmental integrity, social justice and economic development. The major difference between the two is that, in responsible tourism, individuals, organizations and businesses are asked to take responsibility for their actions and the impacts of their actions. This shift in emphasis has taken place because some stakeholders feel that insufficient progress towards realizing sustainable tourism has been made. This is partly true because everyone has been expecting others to behave in a sustainable manner. The emphasis on responsibility in responsible tourism means that everyone involved in tourism – government, local municipalities, public utility companies, other public entities, product owners and operators, transport operators, community services, NGOs and Community-based organization (CBOs), tourists, industry associations – are responsible for achieving the goals of responsible tourism. Stakeholders of sustainable tourism play a key role in continuing this form of tourism. This can include organizations as well as individuals, to be specific. A stakeholder in the tourism industry is deemed to be anyone who is impacted on by development positively or negatively, and as a result it reduces potential conflict between the tourists and host community by involving the latter in shaping the way in which tourism develops.

The values and ulterior motives of governments often need to be taken into account when assessing the motives for sustainable tourism. One important factor to consider in any ecologically sensitive or remote area or an area new to tourism is that of carrying capacity. This is the capacity of tourists and visitors an area can sustainably tolerate without damaging the environment or culture of the surrounding area. This can be altered and revised in time and with changing perceptions and values.

Non-governmental organizations are one of the stakeholders in advocating sustainable tourism. Their roles can range from spearheading sustainable tourism practices to simply doing research. University research teams and scientists can be tapped to aid in the process of planning.

Large conventions, meetings and other major organized events drive the travel, tourism and hospitality industry. Cities and convention centers compete to attract such commerce, commerce which has heavy impacts on resource use and the environment. Major sporting events, such as the Olympic Games, present special problems regarding environmental burdens and degradation. But burdens imposed by the regular convention industry can be vastly more significant.

Green conventions and events are a new but growing sector and marketing point within the convention and hospitality industry. More environmentally aware organizations, corporations and government agencies are now seeking more sustainable event practices, greener hotels, restaurants and convention venues, and more energy efficient or climate neutral travel and ground transportation. Some convention centers have begun to take direct action in reducing the impact of the conventions they host.

Local communities benefit from sustainable tourism through economic development, job creation, and infrastructure development. Tourism revenues bring economic growth and prosperity to attractive tourist destinations which can raise the standard of living in destination communities. Sustainable tourism operators commit themselves to creating jobs for local community members. Increase in tourism revenue to an area acts as a driver for the development of increased infrastructure. As tourist demands increase in a destination, a more robust infrastructure is needed to support the needs of both the tourism industry and the local community. Dominant barriers identified were lack of available money to invest, lack of incentive programs, other business

priorities, and limited access to suppliers of sustainable products, with the most common recommendation being the need for incentive programs to encourage businesses to become more sustainable.

In order to look forward, however, governments must first have a clear sense of the value of tourism for their economies and invest accordingly. They need to have a clear strategic vision, define key objectives (e.g. increasing jobs in certain regions, improving skill levels/capacity building, increasing visitor numbers or yield), and adopt an integrated approach bringing together key stakeholders. Developing comprehensive long-term plans that extend beyond the political cycle – while maintaining the flexibility to adapt to evolving priorities – provides the consistency and certainty that industry needs, and provides a platform for sustainable and inclusive growth.

These would be the major challenges for sustainable tourism to be implemented:

- preserving natural and cultural resources;
- limiting negative impacts at tourist destinations, including the use of natural resources and waste production;
- promoting the wellbeing of the local community;
- reducing the seasonality of demand;
- limiting the environmental impact of tourism-related transport;
- making tourism accessible to all;
- Improving the quality of tourism jobs.

Accordingly, these policies and trends in the tourism sector would be major challenges for the region of Lake Ohrid region (Ohrid and Struga), Debar, Vevchani, Zupa region, Mavrovo-Rostushe in North Macedonia and region of Mat, Diber, Bulquze and Klos in Albania to be achieved. Namely, the regions needs a holistic, integrated approach, planning for the long term, adopting an appropriate pace of development, involving all relevant stakeholders, using the best available knowledge, minimizing and managing risk, reflecting impacts in costs, setting and respecting limits, practicing continuous monitoring. The previous will not be easily achieved but it would set the appropriate directions.

The main aim of European tourism policy is to stimulate competitiveness in the sector, while being aware that in the long term, competitiveness is closely linked to the 'sustainable' way in which it is developed. The European action framework aims first of all to encourage the prosperity of tourism in Europe. But it must also respond to concerns relating to social matters, territorial cohesion and the protection of and capitalization on natural and cultural heritage.

To achieve these objectives, actions promoting tourism in the regions may be grouped under the following four priorities: (1) Stimulate competitiveness in the tourism sector; (2) Promote the development of sustainable, responsible and high-quality tourism; (3) Consolidate the image and profile of the regions as a collection of sustainable and high quality destinations; (4) Maximize the potential of the regions.

* * *

As for the cross-border cooperation in the tourism sector to improve, these objectives need to be accomplished:

1. To promote the region of lake Ohrid (Ohrid and Struga), Debar, Vevchani, Zupa-region, Mavrovo-Rostushe as well as the region of Mat, Diber, Bulquze and Klos as a touristic destination in order to attract attention of the touristic operators from the goal markets on their strategic level, giving opportunity to areas with natural and cultural inheritance, and touristic products and images creation,
2. To continue the process of promoting the regions as a touristic destination by publication of promotional materials and notably of display advertising in all the media that attracts tourists, and
3. The execution of politics for the promotion of preemptively tourism development areas. The purpose is to attract domestic and foreign investments in these areas.

These actions need to be undertaken in order to implement these objectives:

- all stakeholders should be involved in the planning and management of tourism;
- respecting the rights of all citizens to safe and fulfilling holidays and travel;
- ensuring the competitiveness and viability of the tourism industry;
- controlling and managing the use of natural and cultural resources;

- conserving natural and cultural heritage and diversity;
- ensure that tourism respects and benefits local communities;
- Legislative reforms that will encourage the implementation of the principles of sustainable tourism effectively, as well as preservation of cultural and natural heritage

Having in mind that tourism is one of the most important industries in Albania today and that it is one of the main revenue generators in the national economy, these actions need to be undertaken in the following years. In the recent year, Albania is being recognized in the international market and it is becoming a competitive destination, proved by the increased number of the international tourists entering the country every year bringing the tourism on the top of the industries in the country. As for the tourism in North Macedonia, some development has been established yet insufficient. Tourism suffers from lack of coordinated activities and organizational forms functioning on horizontal and vertical line, unclear set of goals, aims and field of interest within the public, as well as the private tourism sector. Some significant efforts have been made in promoting tourism, yet the modest and limited budget is the biggest obstacle in achieving greater competitive advantages. The result is a poorly developed tourism industry. Thus, in order to enhance this situation, firstly the draft-proposal on the National Strategy for tourism development should be adopted as soon as possible by the authorities, so the implementation plan for actions can begin. Then other measures and actions would be undertaken. In the meantime, the relevant stakeholders must rely on the previous national strategy concerning the period from 2009 to 2013 for realization of the set measures and activities and the action plan 2016-2020 and to look for ways to provide financial means for realization of those activities.

In implementing the principles of sustainable tourism in line with European's trends the relevant stakeholders should consider intensive lines of networking, intensive cooperation, inclusiveness and coordinated approach between relevant stakeholders in the cross border region, from which all collaborations, changes, programs and building of long-term and sustainable strategies for tourism development would arise. As technological developments have an impact on tourism development, digitalization presents opportunities for governments to re-think not only how tourists experience their country and how citizens can benefit from enabling technologies, but

also pose challenges for established operators and raise broader policy questions in areas such as employment, consumer protection, privacy and security, taxation and regulation.

Also, the role of inter-relationships between tourism, the tourism stakeholders, such as host communities, governmental bodies, the tourism industry, experts, the voluntary sector, media, and pressure groups, who can affect or are affected by tourism should be considered.

As tourism has been recognized as one of the priority economic opportunities that are of interest of the cross border population, tourism policies in cross border region will need to adapt to these trends and develop a quality offer promoting local cultures and traditions and paying attention to sustainable aspects: preservation of the heritage, of the landscape and of the local culture in line with the concept of sustainable and cultural tourism promoted by the EC, Directorate-General Enterprise and Industry.¹⁴⁰

The cross border cooperation will be strengthened with regard to the development of sustainable tourism, encouraging a higher involvement of small and micro enterprises and local authorities and stimulate competitiveness of the tourism industry by means of an enhanced focus on the diversification of sustainable thematic and cultural tourism products.

¹⁴⁰ <https://ec.europa.eu/growth/tools-databases/eip-raw-materials/en/content/european-commission-dg-enterprise-and-industry-homepage>

REFERENCES

1. "Toward a Strategy for Culture Tourism and Ecotourism Development." Ministry of Tourism, Culture, Youth and Sport. November 2005.
2. Aas, C.; Ladkin, A.; Fletcher, J. (2005). "Stakeholder collaboration and heritage management" (PDF). *Annals of Tourism Research*. **32** (1): 28–48. doi:10.1016/j.annals.2004.04.005
3. Apollo, Michal (2018). "Ethics in tourism as a key to development, prosperity and well-being of all stakeholders: 3rd International Congress on Ethics and Tourism, Krakow, 27–28 April 2017". *International Journal of Environmental Studies*.
4. Bob McKercher and Hilary du Cros, *Cultural Tourism: The partnership between tourism and cultural heritage management*, Routledge, 2002.
5. Borowiecki, K.J. and C. Castiglione (2014). Cultural participation and tourism flows: An empirical investigation of Italian provinces. *Tourism Economics*, 20(2).
6. Brohman, J (1996). "New Directions in Tourism for Third World Development". *Annals of Tourism Research*: CiteSeerX 10.1.1.330.6563. doi:10.1016/0160-7383(95)00043-7.
7. Buhalis, D., Michopoulou, E., Eichhorn, V., & Miller, G. (2005). *Accessibility market and stakeholder analysis - One-Stop-Shop for Accessible Tourism in Europe (OSSATE)*. Surrey, United Kingdom: University of Surrey. http://www.ossate.org/doc_resources/OSSATE_Market&Stakeholder%20Analysis_Public_Version_Fina..pdf
8. Canavan, B (2014). "Sustainable tourism: development, decline and de-growth. Management issues from the Isle of Man". *Journal of Sustainable Tourism*. **22** (1): doi:10.1080/09669582.2013.819876.
9. *Cultural/Heritage Tourism Strategic Planning in Albania*. https://econpapers.repec.org/article/dugactaec/y_3a2014_3ai_3a2_3ap_3a129-138.htm
10. Darcy, S., & Dickson, T. (2009). A Whole-of-Life Approach to Tourism: The Case for Accessible Tourism Experiences. *Journal of Hospitality and Tourism Management*, 16(1).
11. Demonja, Damir. "Cultural Tourism in Croatia after the Implementation of the Strategy of Development of Cultural Tourism" (PDF).

12. Digital Tourism Network, Opportunities and Challenges.
file:///C:/Users/moodle/Downloads/Expedia.pdf
13. Directorate-General for Enterprise and Industry (European Commission), Enterprise & Industry, Publication Office of the EU No. 20 (2-2014), p. 18-19.
<https://publications.europa.eu/en/publication-detail/-/publication/0680021c-1bc8-443d-a94a-b1d68cedb6ab>
14. EU, European Regional Development Fund, “Sustainable Tourism: An opportunity for regions to benefit from their Cultural and Natural heritage, April 2018, p.1.
https://www.interregeurope.eu/fileadmin/user_upload/plp_uploads/policy_briefs/TO6__April_2018_Policy_brief_on_cultural_heritage_and_sustainable_tourism.pdf
15. European Commission 2014-2019, European Tourism as a driving force for economic growth and job creation.
file:///C:/Users/moodle/Downloads/European%20tourism%20as%20a%20driving%20force%20for%20economic%20growth%20and%20job%20creation%20-%20European%20Commission%202014%20-%202019.pdf
16. European Commission, ANNEX to the COMMISSION IMPLEMENTING DECISION, C(2018) 5027 final amending Commission Decision C(2014)5770 of 18.8.2014 adopting the Indicative Strategy Paper for Albania for the period 2014-2020. <https://ec.europa.eu/neighbourhood-enlargement/sites/near/files/20180817-revised-indicative-strategy-paper-2014-2020-for-albania.pdf>
17. European Commission, Communication from the Commission to the European Parliament, The Council, The European Economic and Social Committee and the Committee of the Regions, Brussels, 30.06.2010, COM (2010) 351.
18. European Commission, Employment, social inclusion and social protection policy.
https://ec.europa.eu/europeaid/sectors/policy-1_en
19. European Commission, Guide on EU funding for the tourism sector – 2014-2020, April 2016 ver. 3.3 ISBN 978-92-79-58401-5 (doi:10.2873/251606.) Available at <https://bookshop.europa.eu/en/home/>
20. European Commission, Internal Market, Industry, Entrepreneurship and SMEs, Promoting destination Europe.
21. European commission, The London Declaration of the EC Conference on Sustainable Europe’s Cultural Heritage (2004)

22. European Parliament, Tourism and the European Union, Recent trends and policy developments.
23. European Travel Commission, European Tourism – Trends and Prospects, Quarterly Report – 2/2018. Available at file:///C:/Users/moodle/Downloads/ETC_Quarterly_Report_Q2_2018%20(1).pdf
24. European Travel Commission, Quarterly Report – Q4/2017: Trends and Prospects. https://etc-corporate.org/uploads/reports/ETC-Quarterly-Report-Q4-2017_Final-Public.pdf
25. European Travel Commission, Quarterly Report Q4 2016. [http://www.etc-corporate.org/reports/european-tourism-2016-trends-and-prospects-\(q4-2016\)](http://www.etc-corporate.org/reports/european-tourism-2016-trends-and-prospects-(q4-2016)).
26. European Travel Commission, Quarterly Report Q4 2017. [http://www.etc-corporate.org/reports/european-tourism-2017-trends-and-prospects-\(q4-2017\)](http://www.etc-corporate.org/reports/european-tourism-2017-trends-and-prospects-(q4-2017)).
27. Eurostat, Tourism Satellite Accounts in Europe – 2013
28. Goodwin Harold, Responsible Tourism, 2002.
29. Greg Richards, Cultural Tourism: Global and local perspectives, Routledge, 2007.
30. Guide on EU funding for the tourism sector 2014-2020, Directorate-General Internal Market, Industry, Entrepreneurship & SMEs, ISBN 978-92-79-58401-5 (doi:10.2873/251606).
31. ICOMOS, International Cultural Tourism Charter, Principles And Guidelines For Managing Tourism At Places Of Cultural And Heritage Significance. ICOMOS International Cultural Tourism Committee. 2002. www.cultureindevelopment.nl/cultural_heritage/what_is_cultural_heritage.
32. International Tourism trends in EU-28 member-states – Current situation and forecast for 2020-2015-2030, UN World Tourism Organization 2016.
33. Maharaj Vijay Reddy and Keith Wilkes (eds.), Tourism in the Green Economy, Routledge, 2018.
34. McCool, S. F., Moisey, R. N. (2001). Integrating environmental and social concerns over tourism development. [In:] S. F. McCool & R. N. Moisey (eds.), Tourism, recreation, and sustainability : linking culture and the environment, CABI Publishing: Oxon
35. Milena Ivanovic, Cultural Tourism, Juta and Company Ltd, 2009.
36. Ministry, Tourism and Territory. Tourism development strategy, 2012
37. Mowforth, M. & Munt, I. (1998). Tourism and Sustainability: New Tourism in the Third World. London: Routledge. p. 298. ISBN 978-0203437292.
38. OECD (2018), “Executive summary”, in OECD Tourism Trends and Policies 2018, OECD Publishing, Paris. DOI: <https://doi.org/10.1787/tour-2018-4-en>

39. OECD Tourism Committee, High Level Meeting on Tourism Policies for Sustainable and Inclusive Growth, Analyzing Megatrends to Better shape the future of Tourism, 2-3 October 2017. Preparing for megatrends:<https://www.oecd.org/cfe/tourism/Tourism-meeting-Issues-Paper-on-Analysing-Megatrends-to-Better-Shape-the-Future-of-Tourism.pdf>.
40. OECD Tourism Trends and Policies 2018, p. 11. Available at <http://www.thinkturl.org/media/TENDENCIAS.pdf>
41. OECD, Innovation and Growth in Tourism, 2006. http://www.liaa.gov.lv/files/liaa/attachments/tourisms/petijumi/OECD_Tourism_innovation_growth.pdf.
42. OECD, Organization for Economic Co-Operation and Development. (2009) The Impact of Culture on Tourism. OECD publications.
43. OECD, Organization for Economic Co-Operation and Development. (2009) The Impact of Culture on Tourism. OECD publications.
44. OECD, Policy Statement – Tourism Policies for Sustainable and Inclusive Growth.
45. Report of the Executive Council to the General Assembly, twenty-second session, Chengdu, China, 11-16 September 2017, A/22/6A/22/6. http://cf.cdn.unwto.org/sites/all/files/pdf/a22_06_report_of_the_executive_council_to_the_general_assembly_en_1.pdf.
46. Richards, G. (1996) Cultural Tourism in Europe. CABI, Wallingford. Available to download from www.tram-research.com/atlas.
47. Richards, G. (2001), Cultural Attractions and European Tourism, CABI, Wallingford. <https://doi.org/10.1079/9780851994406.0000>.
48. Richards, G. Cultural Tourism in Europe, CAB International 1996, p.3-4 https://books.google.mk/books?hl=en&lr=&id=xroeAQAAMAAJ&oi=fnd&pg=PR7&dq=tourism+development+cultural+policies&ots=TLNvmettuf&sig=7iaKHtzLVikK7BT3kkgg24XvdOg&redir_esc=y#v=onepage&q=tourism%20development%20cultural%20policies&f=false
49. Santagostino A. , The Single European Market and Trade Policy, Cambridge Scholars Publ., 2017
50. Siem Reap Declaration on Tourism and Culture – Building a New Partnership Model, Feb, 2015, pp.3-5. http://cf.cdn.unwto.org/sites/all/files/pdf/unwto_unesco_siem_reap_declaration_en.pdf.
51. Thuot, Lea; Vaugeois, Nicole; Maher, Patrick (2010). "Fostering innovation in sustainable tourism". *Journal of Rural and Community Development*. **5**: 76–89. doi:10.25316/ir-138. ISSN 1712-8277.

52. UN, Sustainable Development Goals, <https://sustainabledevelopment.un.org/?menu=1300>
53. UN, The World Economic Situation and Prospects 2018, New York, 2018.
54. UN, Transforming the World: 2030 Agenda for Sustainable Development A/RES/70/1
55. United Nations General Assembly, Adoption of the Agenda, A/RES/674(XXII) (documents A/22/1 prov. rev.1 and A/22/1) Chengdu, China, 11-16 September 2017.
56. United Nations, 2030 Agenda for Sustainable Development, Available at <https://sustainabledevelopment.un.org/post2015/transformingourworld>
57. UNWTO Annual Report 2015. Available at http://cf.cdn.unwto.org/sites/all/files/pdf/annual_report_2015_lr.pdf
58. UNWTO Annual Report 2016. http://cf.cdn.unwto.org/sites/all/files/pdf/annual_report_2016_web_0.pdf.
59. UNWTO Annual Report 2017. http://cf.cdn.unwto.org/sites/all/files/pdf/annual_report_2017_web_0.pdf.
60. UNWTO Committee on Tourism Statistics and TSA, Statistical Framework for Sustainable Tourism, February, 2018. http://cf.cdn.unwto.org/sites/all/files/pdf/sf-mst_feb.pdf.
61. UNWTO The declaration by the UN of 2017 as the International Year of Sustainable Tourism for Development A/RES/70/193 <http://www2.unwto.org/content/international-year-sustainable-tourism-development-2017>
62. UNWTO, Annual Report 2016, p.15. Available at http://cf.cdn.unwto.org/sites/all/files/pdf/annual_report_2016_web_0.pdf
63. UNWTO, Declaration on Investing in Tourism for an Inclusive Future, Petra Declaration, October, 2016. http://cf.cdn.unwto.org/sites/all/files/pdf/final_petra-declaration_0.pdf
64. UNWTO, European Union, Tourism Trends, 2016. <https://www.e-unwto.org/doi/pdf/10.18111/9789284419470>
65. UNWTO, International Year of Sustainable Tourism for Development 2017. <http://media.unwto.org/press-release/2017-01-03/2017-international-year-sustainable-tourism-development>.
66. UNWTO, Sofia Declaration on World Civilizations and Creative Tourism, Sofia, Bulgaria, 2 December 2016. Available at: http://cf.cdn.unwto.org/sites/all/files/pdf/sofia_declaration.pdf
67. Valeri Patin, The economy of cultural tourism and the preservation of heritage, 2012.
68. World Tourism Organization (1993) Recommendations on Tourism Statics. WTO, Madrid.
69. World Trade Organization, World Trade Statistical Review 2018.

70. World Travel & Tourism Council, Travel and Tourism –Economic impact 2017 World. <https://www.wttc.org/-/media/files/reports/economic-impact-research/regions-2017/world2017.pdf>
71. World Travel & Tourism Council, Travel and Tourism –Economic Impact 2018 Albania, p. 5. <https://www.wttc.org/-/media/files/reports/economic-impact-research/countries-2018/albania2018.pdf>
72. World Travel & Tourism Council, Travel and Tourism –Economic Impact 2018 NORTH MACEDONIA, p. 5. Available at [https://www.wttc.org/-/media/files/reports/economic-impact-research/countries-2018/ North Macedonia 2018.pdf](https://www.wttc.org/-/media/files/reports/economic-impact-research/countries-2018/North Macedonia 2018.pdf)[https://www.wttc.org/-/media/files/reports/economic-impact-research/countries-2018/ North Macedonia 2018.pdf](https://www.wttc.org/-/media/files/reports/economic-impact-research/countries-2018/North Macedonia 2018.pdf)
- 73.
74. WTTC, Introduction Travel & Tourism Current and Future Growth. <https://www.wttc.org/-/media/files/reports/2018/wttc--g20-jobs-creation-white-paper-en.pdf>
75. WTTC, WTO & Earth Council (1995). Agenda 21 for the travel and tourism industry: Towards Environmentally Sustainable Development. London: WTTC.