

TOURISM POLICY OF BALKAN COUNTRIES: REVIEW OF NATIONAL TOURISM DEVELOPMENT STRATEGIES

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Abstract

A different tourism policy created by various states is one of the primary factors for the existence and development of tourism, along with its natural and anthropogenic resources of specified destinations.

The subject of this paper is the tourism policy of the Balkan countries, as seen through the prism of national strategies for the development of tourism and tourism products. The paper provides basic data for the Balkan countries such as: population, territory characteristics, number of international tourists, the existence of a National Tourism Organization and facilities included in the UNESCO list of world cultural heritage. Table showing government bodies responsible for tourism, national tourism development strategies as well as tourism products defined in these strategies shall be presented. An analysis and review of strategies has been made, based on their duration and types of tourism products.

The paper concluding remarks are regarding the structuring of the prospects and directions of tourism development in the Balkan countries.

Keywords: international tourism, development, tourism policy, tourism strategy, Balkan Peninsula.

Jel Classification: L83

INTRODUCTION

The dynamics and intensity of development of international tourism in the world in the past 60 years has been quite favorable. According to the World Tourism Organization (WTO), tourists arrival at international level in 2013 have reached 1,087 million (UNWTO 2014).

Tourist spending amounted to 1.159 billion U.S. dollars, and the tourism industry accounts for 9% of global gross domestic product. Every eleventh employed person in the world is employed in this sector. WTO studies provide the following data: the

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majority of international tourists were traveling for leisure and recreation 52%, to visit relatives and friends, religious, health and other reasons 27%, business travel 14%, and 7% of tourists stated no reason for their travel.

International tourism is category of tourism in which tourists have a longer radius of motion outside the national boundaries of the territory they continuously inhabited and whereas the economic effects of this kind of tourism is significantly higher compared to the effects of domestic tourism (Marinoski 2008). Almost all international tourists perform three activities that are common to them, and against which we could measure the dimension of international tourism (Bhatia 2001). These tourists activities are as follows: passing through international borders, exchange their national currency for foreign currency and spend time outside their country, meaning that they staying in some kind of facility for accommodation.

In the regional distribution of the world wide international tourism, the dominant position belongs to the Europe region, with 563 million or 52% of the total number of arrivals of international tourists. Within the top 10 destinations by number of international tourists in the world from the Balkan countries is only Turkey (6 place), but most of the territory of the country where the largest portion of tourist traffic is performed, geographically don't belongs to the Balkan Peninsula.

Balkan Peninsula is located in Southeastern Europe and covers the area of the following countries: Croatia, Serbia, Slovenia, Montenegro, Bosnia and Herzegovina, Albania, Macedonia, Bulgaria, Romania, Greece and Turkey. Balkan Peninsula extends to a territory of about 600,000 square kilometers with a population of around 60 million people (without most of the territory and population of Turkey). The name of Balkan Peninsula is of Turkish origin, or rather from the Turkish word "balkan", which means "mountain with forest" (Griffiths, Krystufek, and Reed 2004). Geographical boundaries of the Balkan Peninsula vary according to the parameters that are taken into account, but for the purposes of this research the boundaries are the water surfaces that surround the peninsula such as the Black Sea, Aegean Sea, Adriatic Sea and the rivers Sava and Danube.

Table 1 shows that according to the number of population and area of the territory of the Balkan Peninsula, Romania is the largest country where the smallest country is Montenegro. According to the arrivals of international tourists visiting the Balkan countries, most of them have visited Greece and least tourist has visited Macedonia. The number of items included in the World Heritage List by UNESCO in the world is 981, including 759 cultural, 193 natural and 29 mixed, situated in the territories of 160 countries (<http://whc.unesco.org/en/list>, accessed 10.10.2013). In the Balkan Peninsula can be located 56 such facilities, mostly in Greece 17, and one located in Macedonia - Natural and Cultural Heritage of the Ohrid region, adopted in 1979.

Table 1. International tourist arrivals and UNESCO World heritage list properties in Balkan countries²

Country	Capital city	Population (000)	Area in km ² (000)	International tourist arrivals (000) in 2013	UNESCO World heritage list properties
Croatia	Zagreb	4,496	56,594	10,955	7
Serbia	Belgrade	7,186	88,361	922	4
Slovenia	Ljubljana	2,011	20,273	2,259	3
Montenegro	Podgorica	625	13,812	1,324	2
Bosnia and Herzegovina	Sarajevo	4,007	51,197	529	2
Albania	Tirana	2,821	28,748	3,156*	2
Macedonia	Skopje	2,054	25,713	400	1
Bulgaria	Sofia	7,517	110,994	6,897	9
Romania	Bucharest	22,355	238,391	1,715	7
Greece	Athens	10,647	131,957	17,923	17
Turkey	Ankara	68,893	783,562	37,759	11**

Note: *The data presented is for 2012. ** Geographically only two facilities are located on the Balkan Peninsula.

THEORY AND METODOLOGY

Many states have encouraged the development of international tourism through direct and indirect forms of support. At the national level, the development of international tourism is within the ministries and state agencies for tourism. In general these institutions are engaged in performing activities such as: control and regulation of tourism sector, collecting relevant sector information, preparation of national strategy for tourism development, developing a national tourism advertising campaign and more. National tourism organizations are present in more than 100 countries. WTO has audited the budget of 109 such organizations and it has defined the agencies and its subsidiaries as follows (Jeffries 2001):

a) National Agency for tourism is defined as:

- Central administrative body with administrative responsibility for tourism at the highest level i.e. central management authority with a power for direct intervention in the tourism sector; and
- All administrative authorities who have the power to make interventions in the tourism sector.

b) Other governmental or administrative bodies of lower rank. An example is the National Tourism Organization, which is defined as: an autonomous governmental body, with semi-public or private status, established or recognized by the state as an authority having jurisdiction at the national level to promote, and in some cases marketing the tourism industry.

The term "tourism policy" is representing the conscious activity of the state, or society in the field of tourism (Ackovski and Ackovska 2003). Primary task of this policy is to undertake measures and activities that will be of crucial importance for the

² Source: UNWTO Tourism highlights, 2014 Edition and UNESCO World Heritage List.

initiation of relevant factors responsible for tourism development in order to increase the tourist trade and consumption and to improve its structure and quality.

In more specific terms, tourism policy fulfills the following functions (Goeldner and Ritchie 2009):

- It defines the rules of the game — the terms under which tourism operators must function;
- It sets out activities and behaviors that are acceptable for visitors;
- It provides a common direction and guidance for all tourism stakeholders within a destination;
- It facilitates consensus around specific strategies and objectives for a given destination;
- It provides a framework for public/private discussions on the role and contributions of the tourism sector to the economy and to society in general; and
- It allows tourism to interface more effectively with other sectors of the economy.

Tourism policy has direct and indirect holders or executors. Direct holders and operators of tourism policy are:

- Representatives of government bodies at all levels (assemblies, parliaments, individual councils, institutions, commissions, etc.) and
- The executive administration (government) at all levels (secretaries, tourism ministries, committees for Hospitality and Tourism, the main offices of hospitality and tourism at national, regional, municipal, city and a similar level).

Indirect holders and executors of tourism policy are:

- Special bodies outside the public administration (municipalities and chambers of special business associations);
- Social organizations in the field of hospitality and tourism (tourism associations at all levels, tourist bureaus);
- Local communities; and
- Gathering and other commercial and non-commercial organizations in the tourism industry that directly or indirectly participate in meeting the tourist needs.

For the realization of the objectives of tourism policy various measures (instruments and resources) are applied. In general, all instruments of tourism policy can be divided into four groups:

- Legal regulations which mainly include: constitutional provisions, laws, bans, permits, decisions, orders, etc.;
- Administrative instruments which mainly include: taxes, duties, fees, contributions, loans and other public revenues and public subsidies (compensation, contributions, premiums, guarantees, regression, etc.);
- Economic instruments mainly including: plans, programs, resolutions, funds, loans, bonds, money, rates and prices, etc.; and
- Contracts and agreements.

Besides creating tourism policy, tourism is a factor that affects the formation of public policies in other areas, such as urban planning (Dredge and Jenkins 2011).

The purpose of this paper is to make a review of the tourism development strategies of Balkan countries. In the interest of the paper, an exploratory (qualitative) research was carried out which resulted in an insight into the state of tourism development strategies at national and international level. Exploratory research is typical of a situation in which researchers have little knowledge of the problem they explore

(Budinoski 2010). Part of the research was to use secondary data sources by consulting relevant professional literature on the tourism policy subject and the Internet. Using official web pages of government bodies responsible for tourism policy development of Balkan countries we collected tourism development strategies that have been analyzed later. Also, several informal and unstructured interviews with officials from Agency for Promotion and Support of Tourism of Macedonia were conducted, in order to obtain "first-hand" information associated with various aspects of the tourism policy creation, development and implementation.

RESULTS AND DISCUSSION

Tourism policy of Balkan countries

Tourism as an industry in the various Balkan states falls under the jurisdiction of different ministries. For example, in Greece and Croatia as the most developed tourist countries in the Balkans there are separate Ministry of Tourism. In Turkey, Bosnia and Herzegovina, Albania and Montenegro, tourism policy is created in ministries where the tourism industry is combined with other sectors such as culture, youth and sport, environment and sustainable development. In countries such as Romania, Bulgaria, Macedonia, Slovenia and Serbia, tourism is managed by the Department of Tourism and Hospitality Management within the Ministry of Economy and Energy, Regional Development and Administration, Technology and Finance.

Table 2. Government bodies responsible for tourism policy development of Balkan countries³

Country	Government body responsible for tourism policy development	Official web page	National tourism organization/agency web page
Croatia	Ministry of tourism	mint.hr	croatia.hr
Serbia	Ministry of finance and economy, Department of Tourism	mfp.gov.rs	srbija.travel
Slovenia	Ministry of Economics and Technology, Department of Tourism	mgrt.gov.si	slovenia.info
Montenegro	Ministry of Tourism and Sustainable Development	mrt.gov.me	montenegro.travel
Bosnia and Herzegovina	Ministry of Tourism and Environment	fmoit.gov.ba	bhtourism.ba
Albania	Ministry of Tourism, Culture, Youth and Sports	mtkrs.gov.al	albaniantourism.com
Macedonia	Ministry of Economy, Department of Tourism and Hospitality	economy.gov.mk	tourismmacedonia.gov.mk
Bulgaria	Ministry of Economy and Energy, Department of Tourism	mi.government.bg	bulgariatravel.org
Romania	Ministry of Regional Development and Administration, Department of Tourism	mdrt.ro	romaniatourism.com
Greece	Ministry of Tourism	gnto.gov.gr	visitgreece.gr
Turkey	Ministry of Culture and Tourism	kulturturizm.gov.tr	goturkey.com

³ Source: Official web pages of selected institutions.

It should be noted that all Balkan countries have established national tourism organizations, for example the Tourist Organization of Serbia or government agencies for tourism, as exemplified by the Agency for Promotion and Support of Tourism of Macedonia. These bodies have prepared official websites and also perform the function of promoting the tourism potential of a given country at international level. Main activities and competences of these organizations will be presented through the example of the Agency for Promotion and Support of Tourism of Macedonia and its main activities as follows:

- Active promotion of tourism and professional presentation of all segments and regions included in the tourist offers, as well as preparing an analysis of domestic and foreign tourist market potential;
- Preparation and realization of the program and securing an informative educational materials to promote and support tourism values;
- Establishing and developing of a universal tourism information system and its connection with other information systems;
- Actively promote the overall tourism potential of the Republic of Macedonia in the country and abroad and cooperate with world famous tour operators to attract as many tourists as possible;
- Encourages and coordinates all tourism organizations, chambers, associations, organizations and other institutions in the field of tourism and hospitality in order to enhance and promote tourism;
- Subsidizing the Tourism sector;
- Initiate and direct inter-municipal, regional and international cooperation for the promotion of tourism;
- Participates in attracting investment in tourism industry in Republic of Macedonia etc.

National tourism development strategies and tourism products of Balkan countries

One of the instruments of tourism policy is the development of strategies for tourism development. Managing the development of individual companies, industries or sectors at national, regional and destination level, for which often are produced special programs and development solutions that are called strategies (Budinoski 2009). The term strategy is used since ancient times in connection with knowledge of the generals. Within the last forty years this term is used in the economy and specifically in tourism and hospitality. Nowadays, the strategy is mandatory and includes system management solutions which determine the prospects for development forms and methods of its action, the allocation of resources for the purpose of achieving certain goals, etc.

In Table 3, an overview of the Balkan countries is presented, from which we can observe that all countries have developed and adopted national strategies for the development of tourism. These strategies are usually made for a period of several years (4 to 6), but in the case of Greece, Communication strategy is created for two years. In all strategies discussed, the vision of the level and the development of tourism in the future is included. Most of the strategies are made by ministries and experts in the field of tourism as well as education and NGOs. Strategy for tourism development in Croatia

is the latest, prepared in 2013, and the strategy for tourism development of Romania is the longest i.e. until 2026.

Table 3. Review of National tourism development strategies and tourism products of Balkan countries⁴

Country	National tourism strategy	Tourism products
Croatia	Tourism development strategy in Republic of Croatia until 2020	Sun and sea; Nautical tourism; Business tourism; Bike tourism; Gastronomy and enology; Rural and mountain tourism; Cultural tourism; Golf tourism; Sport tourism; Ecotourism
Serbia	Tourism development strategy in Serbia until 2015	City Breaks; Touring; Cruise tourism; Business tourism; Health tourism; Mountain and lake tourism; Event tourism; Rural tourism; Special interests tourism
Slovenia	Tourism development strategy in Republic of Slovenia 2012–2016	Health tourism; Nature tourism; Business tourism; Gastronomy; Cultural tourism; Entertainment tourism and gaming; Cruise tourism
Montenegro	Tourism development strategy in Montenegro until 2020	Nautical tourism and water sports; Mountain tourism; Golf tourism; Wellness and spa tourism; MICE (Meetings, Incentives, Conferences, Events) tourism; Agro tourism; Camp and wilderness tourism; Cultural and religious tourism
Bosnia and Herzegovina	Tourism development strategy in Bosnia and Herzegovina 2008-2018	Vacation tourism; Sport and recreational tourism; Cultural tourism; Religious tourism; Business tourism; Gastronomy; Health tourism, Ecotourism, Rural tourism; Special interests tourism; Event tourism
Albania	Tourism development strategy in Albania 2007-2013	Sea and sand; Special interests tourism; Business and conference tourism (MICE)
Macedonia	Tourism development strategy in Republic of Macedonia 2009–2013	Lake tourism; National parks; Wine tourism; Rural tourism; Cultural tourism; Spa tourism; Hunting tourism; Conference and meetings
Bulgaria	Strategy for sustainable development of tourism in Bulgaria 2009–2013	Sea tourism; Mountain tourism; Cultural tourism; Health tourism; Eco tourism; Rural tourism; Business tourism; Golf tourism; Sport and adventure tourism; Hunting tourism
Romania	Master Plan for Tourism Development in Romania 2007-2026	Business tourism; Spa tourism; Rural tourism; Coastal tourism; Cultural tourism; Active tourism; Bucharest for city breaks; Danube cruise ship tourism
Greece	Communication strategy for tourism in Greece 2012-2013*	Touring; Gastronomic tourism; Congress tourism; Marine tourism; Cultural tourism; Religious tourism
Turkey	Tourism development strategy in Turkey until 2023	Health and thermal tourism; Winter tourism; Golf tourism; Sea tourism; Ecotourism; Congress and expo tourism

Note: *Data is taken from the Ministry of Tourism of Greece.

The tourism product is the sum of goods and services, which in a certain area and a certain time, is fulfilling specific travel needs (Tuntev 2007). It includes transportation, lodging and food, sports and recreation, events, merchandise, souvenirs, natural beauty, cultural heritage, etc. An OECD analysis of country profiles indicates an increasing

⁴ Source: National tourism development strategies of the selected countries.

understanding on the part of policy makers and regulatory authorities, of the importance of quality tourism products and services (OECD 2012).

Tourism products, through which Balkan countries, with its national strategies for the development of tourism, dedicate special importance are the following:

- Marine tourism includes activities such as swimming, sunbathing, water sports and more. Each Balkan country with sea shore have a certain length, where the longest coastline length of 15,000 km belongs to Greece, followed by Croatia with 5.790 km of coastline. The smallest coastline of approximately 20 km belongs to Bosnia, and Slovenia with 32 km. The length of of Greece and Croatia coast lines is derived from the large number of islands (Bramwell 2004). A developed tourist infrastructure is set in motion in the coastal regions of the Balkan Peninsula;
- Mountain tourism covering winter sports, active holidays, cycling etc.. Mountain tourism developed by the countries of the Balkan Peninsula, is explained by the large number of mountains, of which the most important are: Dinaric Mountains, Shar Planina, Pindos, Stara Planina, Rhodope, etc. The highest peaks of the Balkans are Musala in the Rila mountain 2925 meters above sea level, then Mitikas top of Mount Olympus and the 2,917 m peak of Mount Pirin, Vihren with 2914 m above sea level. There are numerous ski resorts located in the mountains;
- Cultural tourism includes visits to cultural and historic sites, attendance at events and festivals or visiting museums. The rich cultural and historical heritage of the Balkan countries is a great opportunity to develop this kind of tourism. Urban centers provide an opportunity to develop this kind of tourism;
- Business tourism and conference tourism which covers journeys arising directly because of work responsibilities or indirectly in carrying out activities related to work. Also, this form of tourism includes travel for corporate or organizational meetings, conventions, congresses and incentives trips (used by companies as a means to reward their best employees). Larger cities and economic centers of the Balkans subject to this form of tourism;
- Rural tourism involving visiting rural areas. Local gastronomy, traditional crafts, hospitality and specific architecture of the villages offer good prospects for development of rural tourism in the Balkans. Territories of the Balkan countries in biggest part belong to the rural classification and this kind of tourism began to develop in the last two decades;
- Health and spa tourism which includes the use of various health services, treatments to improve the health, stay spas, using various massage techniques and more. Due to lower the costs of health services and the availability of thermal mineral waters, most of the Balkan countries have successfully developed this kind of tourism.

Aside of the most common tourist products, Balkan countries additionally create and develop other types of tourism such as: sports, golf, active, eco, hunting, religious, wine, lake, river, etc.

CONCLUSION

Tourism is a success story of the present day and the expectations are that it will maintain its continuous and positive level of development in the coming years. Forecasts are moving in a direction that the European continent, in which the Balkan countries are located, within the next 20 years, will be the most evident source of consumer demand and the development of international tourism in the world.

According to Hall and Tribe (1995), unfortunately, despite the recognition of the importance of government and tourism organisations, the field of tourism studies has developed with little attention to, and understanding of, the real significance of tourism policy.

In order, for the tourism industry to be sustainable in the future, it requires an effective policy and planning to be established nowadays. The creators of tourism policy and strategies should be able to identify the tourism trends and propose adequate mechanisms aimed at development of high quality tourism products and services. Tourism policy basically means planning which is aimed at giving guidance to the tourism which needs to move forward in its development (Edgell and Swanson 2013).

The aim of this paper was to make an overview of the tourism policy in the Balkan countries manifested through the work of the authorities, most often ministries, whose responsibilities include tourism development, establishment of national tourist organizations and the development of a National Strategy for tourism development. Balkan countries have adequate natural and anthropogenic resources for tourism development and follow modern trends in the international market.

Due to the similarities of the countries situated on the Balkan Peninsula, the creation of common regional - Balkan tourist product is of crucial importance. After the formation of this product, next step should be joint presence on the international tourism market as well as mutual promotion.

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