



# RESEARCH ON TOURISM IN THE WESTERN BALKANS

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The Balkan Forum. Tourism: An Overview.

The geographic focus is **Albania, Bosnia and Herzegovina, Croatia, Greece, Kosovo, Macedonia, Montenegro, Serbia.**



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## 1 SUMMARY

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Tourism is an interdisciplinary branch that builds economic and ecological connections, and creates social benefits. Worldwide the tourism sector offers employment to over 292 000 000 people according to the World Travel and Tourism Council ([WTTC](#)) and on European level over 10 million are employed in the tourism sector. According to [Eurostat](#), 65% of tourists travel independently (with own or rented vehicles), and choose to stop in several spots or chose an active vacation, which is a good opportunity for the Balkan region to offer a unique and unified destination.

Tourism and agriculture are the largest potential sectors for economic growth across the Balkan countries. While tourism constitutes a growing source of revenue for the Balkan countries, much of that growth has been fueled by domestic demand and cheap package tourism, often with adverse environmental effects. The potential for developing scaled up, regional initiatives and sustainable tourism products that can celebrate Balkan diversity remains under-explored. The region is an emerging destination and tourism is new to most of the countries in the region. Sustainable development of tourism needs infrastructural and communication programs and connection of the tourism sectors between countries, before rapid economic development and recognition and affirmation of the region can be achieved.

The Balkan region can offer many different experiences from gastronomy, to natural and cultural heritage, traditions, hospitality, historical sites, impressive coastlines and so much more.

The region lies at a crossroads, where empires met, fought and combined to form a kaleidoscope of cultures unique in Europe, left their own indelible mark on the local architecture, cuisine, languages, music and traditions. In Balkans one finds Medieval Orthodox monasteries, Renaissance Catholic churches, mosques and minarets standing together within the same city walls. The aroma of local food from the bazaars testifies to the fusion of East and West, while the region's eclectic music and dance celebrate this rich heritage.

There are several underlying issues that will challenge any effort to develop a shared vision for regional tourism based on sustainable development. There remains a lack of consensus on the mutual benefits (income, jobs, and investment opportunities) of shared tourism products. The persistence and recent increase in nationalist sentiments has reinforced competition over collaborative approaches, exacerbated the region's 'branding problem', and made it difficult to celebrate the region's diversity. Connectivity is limited between cities of the region and transport networks are poor. Lack of an information sharing platform for useful tips and guidelines is also identified as a challenge. In terms of capacity, the region underperforms in quality and status of tourism programmes, while lacking collaborative vehicles or networks that could facilitate cooperation and help to manage and promote a regional tourism 'product.' Finally, the region suffers from a branding problem; the "Balkans" conjures up narratives and stereotypes of conflict and fragmentation. Strengthening transportation infrastructure was identified as critical for improved regional tourism and sustainable economic growth in the Balkans. However, investments in infrastructure will not happen without regional cooperation, the building of consensus, and political will; these are preconditions. For instance, current plans for mutually beneficial transport projects, such as the Adriatic Highway, require more promotion of the clear advantages they would offer through modest initiatives that connect



municipalities across borders, produce tangible benefits for communities, and generate local demand for improved infrastructure.

This overview is a valuable source of information on the current state of tourism in 8 countries of the Balkans. It contains evidence and data that indicate the priority given to development of tourism in each country, such as budget allocations, earnings from tourism, what kind of tourism they promote, what are their most developed and marketed attractions, which are their best practices so far, and who are the donors in the development of tourism. The countries included in this research are Albania, Bosnia and Herzegovina, Croatia, Greece, Macedonia, Montenegro, Serbia and Kosovo.

**Croatia** has the longest tradition in tourism and the highest standards of service in the region. It is the best 'gateway' to the Balkans and its marketing and image reaches mass audience.

**Greece** is a well-known destination with world-famous coastal destinations and islands, historical sites, busy cities, cuisine and wine, and the mountains and rural paradises.

**Macedonia** is making progress with development of adventure tourism, though it lacks investment in infrastructure, and marketing of the destination.

**Kosovo's** main assets are the adventure and culture potential for tourism, though capacities are under development.

**Serbia** has great heritage in infrastructure when it comes to spa-tourism, winter tourism, food, rural and agro tourism, but it is not adapted to modern-day tourism, and investments are limited.

**Bosnia and Herzegovina** offers a huge variety, from adventure sports in any season, to cultural, historical and especially recent history.

**Montenegro** has a very developed coastline with mass and summer season tourism, while the inland areas of the country are very lush but un-marketed.

**Albania** is becoming recognized on the international travel market for its mountains and inland rather than for its coastline.

Some regional and European initiatives have brought positive momentum to regional cooperation, notably through projects which are expected to have an economic and social impact. Examples are The Berlin process, the project "Dinaric Arc Parks" implementing European regulations for protection of the environment and nature in eight countries, the projects of international mountain trails "Peaks of the Balkans", "Balkan Hiking Adventure", Via Dinarica, and many others. Initiatives like these promote regional tourism destinations that offer world-class hiking, cycling, skiing, fly-fishing, kayaking, rafting, caving, and a plethora of opportunities to explore the unique traditional lifestyles and cuisine of the region. They take the accent off the political and national borders and on to recognizing, preserving, and promoting the common natural and cultural heritage the people of the region share.

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## KEY FINDINGS

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Evidence suggests that:

- Joint action is essential for further development and growth of the region.
- There is limited connection and cooperation between the countries in the field of tourism.
- Institutions (both public and private) lack the political will or the capacity to develop and implement a model of integrated tourism development.
- There is insufficient utilization of the available funds of the EU and other international and bilateral development institutions. This can be seen on a national level in some of the countries, and on travel industry level in others. The most common reason for this is lack of knowledge on the part of final beneficiaries and lack of utilization system and experience within the industry.
- Inadequate education of tourism professionals operating in the field, across the region.
- The region is mostly unknown and under-promoted to the general public on the world market. This can be used positively to make the region stand out as an exotic and unexplored destination which is a popular tourist market and is already the way the region is depicted by services like Lonely Planet, National Geographic, and other media like The Guardian, Wanderlust, Huffington Post and others.

## 2 OVERVIEW OF STATES, TERRITORY, POPULATION AND TOURISM STRATEGIES

The territory of interest in the Balkan peninsula by countries, territory and population

Table 1: <sup>1</sup> The territory of interest in the Balkan peninsula by countries, territory and population

State	Territory	Population ( 2015 )
 Albania	28,750 km <sup>2</sup>	2,893,005
 Bosnia and Herzegovina	51,180 km <sup>2</sup>	3,825,334
 Croatia	30,000 km <sup>2</sup>	4,225,316
 Greece	104,470 km <sup>2</sup>	9,282,837
 Kosovo	10,908 km <sup>2</sup>	1,804,944
 Macedonia	25,710 km <sup>2</sup>	2,069,172
 Montenegro	13,810 km <sup>2</sup>	622,099
 Serbia	54,000 km <sup>2</sup>	7,111,973

### National Strategies for tourism of the Balkan countries:

- National strategy for tourism of Macedonia foresees several key points of development:<sup>2</sup>
  - raising awareness and improving attractiveness of the country as a world destination
  - improving organizational structures in tourism
  - improving the investment climate for development of additional accommodation facilities
  - improvement of the quantity and quality of the available tourism products
  - Improving framework conditions for tourism development.
  - As one of the main focus areas it singles out development of rural tourism for which a separate strategy has been developed.
- National strategy for tourism of Serbia 2016-2025  
In line with the development vision, the tourism growth strategy of Serbia is based on the following main levers:<sup>3</sup>
  - 1) Match tourism offers with modern trends and demand in the international market
  - 2) Inclusive tourism
  - 3) Introduction of modern quality standards in accommodation
  - 4) Introduction of new attractions and products to the ongoing capital projects (Belgrade, Novi Sad, Kopaonik, Zlatibor, Palić and Danube)
  - 5) Improvement of rural and hunting tourism
  - 6) Continue with the EU integration process and make more efficient use of the available EU funds

<sup>1</sup> <https://en.wikipedia.org/wiki/Balkans>. Definitions and boundaries, Balkan Peninsula, Demographics

<sup>2</sup>

[http://www.economy.gov.mk/Upload/Documents/BER\\_Tourism%20Strategy%20Macedonia\\_DRAFT\\_16%2001%2021\\_MK%20\(1\)%20\(3\).pdf](http://www.economy.gov.mk/Upload/Documents/BER_Tourism%20Strategy%20Macedonia_DRAFT_16%2001%2021_MK%20(1)%20(3).pdf)

<sup>3</sup> <http://mtt.gov.rs/download/3/strategija.pdf>



- National strategy for tourism of Croatia 2020  
Croatia has aimed its strategy on developing and focusing on: <sup>4</sup>
  - Deregulation Tourism- embracing the entire national territory
  - Culture of quality Innovation of the market image
  - The 'Green' as an operational concept
  - Authenticity and creativity Beyond the sun and sea
  - Croatian products for Croatian tourism
  - Nautical tourism
  - Business tourism
  - Bike tourism
  - Gastronomy and enology
  - Rural and mountain tourism
  - Golf and other sport tourism.
  
- National strategy Albania 2014-2020  
Strategic priorities and objectives:<sup>5</sup>
  - Promotion and marketing to improve Albania's tourism image as a tourist destination of special interest
  - Diversify tourism products extended in the whole territory to ensure integrated tourism development
  - Expand the season beyond the current 3-month period
  - Upgrade infrastructure and access to cultural monuments
  - Establish a National Register of tourist resources
  - Perfect the system of certification and standards in tourism in order to increase the quality and strengthen data collection, processing capacity and human capacity.
  
- National strategy for tourism Bosnia and Herzegovina 2008-2018  
Bosnia and Herzegovina channels its efforts into developing and improving the following fields:<sup>6</sup>
  - Vacation tourism
  - Sport and recreational tourism
  - Cultural tourism
  - Religious tourism
  - Business tourism
  - Gastronomy;
  - Health tourism
  - Ecotourism
  - Rural tourism
  - Special interests tourism
  - Event tourism.
  
- National strategy for tourism of Montenegro 2020  
Montenegro's long-term strategy aims at sustainable development of tourism especially in the fields of:<sup>7</sup>

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<sup>4</sup> <http://mtt.gov.rs/download/3/strategija.pdf>

<sup>5</sup> [https://shtetiweb.org/wp-content/uploads/2014/06/NSDI\\_2014-2020\\_version\\_JUne-2013.pdf](https://shtetiweb.org/wp-content/uploads/2014/06/NSDI_2014-2020_version_JUne-2013.pdf)

<sup>6</sup> <http://www.fmoit.gov.ba/downloads/strategija.pdf>

<sup>7</sup> <https://www.google.com/url?sa=t&rct=j&q=&esrc=s&source=web&cd=1&cad=rja&uact=8&ved=0ahUKEwivzOs3NvWAhVREVAKH5tAsAQFggsMAA&url=http%3A%2F%2Fwww.mrt.gov.me%2FResourceManager%2FFileD>

- 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.
  
- Travel and tourism economic impact 2017 Greece  
 Greece has an already well developed tourist offer of mass and cultural tourism and aims at improvement and enlargement of the scope and to focus on providing new attractions connected to:<sup>8</sup>
  - The sea and beach,
  - Cultural and religious tourism
  - Nautical tourism
  - MICE tourism
  - City breaks
  - Medical tourism
  - Agrotourism
  - Eco-tourism.
  
- Development of tourism through effective policies and legislations Kosovo  
 Kosovo's tourism strategy is mainly constituted of:<sup>9</sup>
  - Improving and developing the infrastructure
  - Preparing tourist maps for each municipality
  - Reassessing Kosovo's tourism potentials based on international standards
  - Investing in enhancing local gastronomy and its usage as a tourist product
  - Promoting and supporting health tourism
  - Development of tourism through effective policies and legislation
  - Promoting mountain tourism
  - Drafting a joint tourist offer with Republic of Albania for foreign visitors and investors and for Albanian diasporas.

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ownload.aspx%3Frid%3D89273%26rType%3D2%26file%3D01%2BMontenegro%2BTourism%2BDevelopment%2BStrategy%2BTo%2B2020.pdf&usg=AOvVaw1ECWohg1PVQsl1y-33Ewu5

<sup>8</sup> <https://www.wttc.org/-/media/files/reports/economic-impact-research/countries-2017/greece2017.pdf>

<sup>9</sup> [http://d4d-ks.org/wp-content/uploads/2017/07/D4D\\_PI\\_10\\_ENG\\_WEB.pdf](http://d4d-ks.org/wp-content/uploads/2017/07/D4D_PI_10_ENG_WEB.pdf)

### 3 TOURISM FINDINGS IN THE REGION

#### National income from tourism and data on number of tourists visiting each country of our geographic focus.

Table 2: National income from tourism and data on number of tourists visiting each country of our geographic focus.<sup>10</sup>

Number of tourists visiting each country in millions	2011	2012	2013	2014	2015	2016
Albania	2,9	3,5	3,2	3,6	4,1	3,8
Bosnia-Herzegovina	0,4	0,44	0,52	0,53	0,68	0,77
Croatia	9,9	10,3	10,9	11,6	12,68	13,8
Greece			20,1	24,2	26,1	24,6
Kosovo	0,07	0,09	0,09	0,1	0,1	0,1
Macedonia	0,32	0,35	0,4	0,42	0,48	0,51
Montenegro	1,2	1,2	1,3	1,35	1,5	1,7
Serbia	0,76	0,81	0,92	1,02	1,1	1,3

#### The budget that each state allocates for tourism

Table 3: budget that each state allocates for tourism<sup>11</sup>

INVESTMENT	2010	2011	2012	2013	2014	2015	2016
Capital Investment							
<b>Albania</b>							
Local currency in bn (Nominal prices)	19,9434	17,9185	17,8195	19,1103	19,4119	19,9157	20,7992
Local currency in bn (Real prices)	21,1657	18,5864	18,2935	19,4649	19,6934	19,9157	20,1934
Percentage growth	-1,97752	-12,1861	-1,5761	6,4036	1,17365	1,12889	1,39455
Percentage of exports	5,65911	4,69138	5,16461	5,78093	5,72287	5,65183	5,55834
US\$ in bn (Nominal	0,191874	0,177586	0,164705	0,180849	0,184034	0,158504	0,163735

<sup>10</sup> <http://www.e-unwto.org>

<sup>11</sup> <https://www.wttc.org/>



prices)							
US\$ in bn (Real prices)	0,168453	0,147925	0,145594	0,154917	0,156735	0,158505	0,160715
<b>Bosnia and Herzegovina</b>							
Local currency in bn (Nominal prices)	0,249679	0,225997	0,216039	0,197009	0,241148	0,268382	0,295391
Local currency in bn (Real prices)	0,25577	0,225901	0,214139	0,19585	0,237782	0,267308	0,295391
Percentage growth	5,27974	-11,6779	-5,2065	-8,54086	21,4103	12,4174	10,5056
Percentage of exports	5,80713	4,75752	4,51602	4,17898	4,67391	4,88475	5,01032
US\$ in bn (Nominal prices)	0,169079	0,160635	0,141926	0,133738	0,163579	0,152187	0,167453
US\$ in bn (Real prices)	0,144992	0,12806	0,121393	0,111025	0,134795	0,151533	0,167453
<b>Croatia</b>							
Local currency in bn (Nominal prices)	7,20635	6,97215	6,65911	6,70633	6,54148	7,00395	7,44072
Local currency in bn (Real prices)	7,56733	7,20622	6,7558	6,76881	6,60048	7,05966	7,44072
Percentage growth	-17,0715	-4,77194	-6,25043	0,192559	-2,4868	6,95672	5,39771
Percentage of exports	10,3317	10,3316	10,2675	10,2716	10,2478	10,7602	10,9861
US\$ in bn (Nominal prices)	1,31072	1,3047	1,13825	1,17554	1,13801	1,02124	1,095
US\$ in bn (Real prices)	1,11363	1,06049	0,994206	0,99612	0,971349	1,03892	1,095
<b>Greece</b>							
Local currency in bn (Nominal prices)	5,64634	4,42591	3,31252	3,0246	2,80182	2,97909	3,16715
Local currency in bn (Real prices)	5,24474	4,10817	3,10008	2,82915	2,69503	2,90462	3,16715
Percentage growth	-20,0522	-21,6706	-24,5387	-8,73945	-4,74049	7,77704	9,03806

Percentage of exports	14,1573	13,9733	13,7832	13,7276	13,7049	14,7692	15,6891
US\$ in bn (Nominal prices)	7,48852	6,16421	4,25773	4,01673	3,72367	3,30555	3,53363
US\$ in bn (Real prices)	5,85163	4,58355	3,4588	3,15652	3,00689	3,24073	3,53363
<b>Macedonia</b>							
Local currency in bn (Nominal prices)	2,18641	2,37266	2,64924	3,0254	3,60053	4,20439	4,54347
Local currency in bn (Real prices)	2,49096	2,60616	2,88107	3,14897	3,7051	4,20859	4,54347
Percentage growth	-6,74513	4,62477	10,5484	9,29867	17,6604	13,5893	7,95697
Percentage of exports	2,04341	1,89924	1,96234	2,09247	2,2492	2,35549	2,40442
US\$ in bn (Nominal prices)	0,05	0,05	0,06	0,07	0,08	0,08	0,08
US\$ in bn (Real prices)	0,04	0,05	0,05	0,06	0,07	0,08	0,08
<b>Montenegro</b>							
Local currency in bn (Nominal prices)	0,194883	0,149666	0,155968	0,182621	0,197533	0,237138	0,263562
Local currency in bn (Real prices)	0,207997	0,157795	0,164189	0,188265	0,201581	0,238324	0,263562
Percentage growth	1,75241	-24,136	4,05216	14,6638	7,07294	18,2274	10,5897
Percentage of exports	28,8144	23,4958	24,8217	26,9313	30,0602	32,5952	33,9825
US\$ in bn (Nominal prices)	0,258124	0,208158	0,200473	0,242525	0,26198	0,262903	0,292197
US\$ in bn (Real prices)	0,230595	0,174939	0,182028	0,20872	0,223482	0,264217	0,292197
<b>Serbia</b>							
Local currency in bn (Nominal prices)	16,6871	22,2418	24,5921	26,3106	27,5687	29,7562	32,8064
Local currency in	21,9692	26,7268	27,8092	28,2175	28,7872	30,7931	32,8064

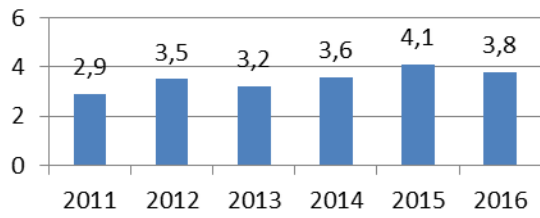
bn (Real prices)							
Percentage growth	-10,631	21,656	4,0499	1,46817	2,01901	6,96775	6,53827
Percentage of exports	2,92728	3,54922	3,24137	3,9366	4,22832	4,12694	4,145
US\$ in bn (Nominal prices)	0,2147	0,303206	0,279587	0,308959	0,311845	0,273465	0,297866
US\$ in bn (Real prices)	0,19947	0,242667	0,252494	0,256201	0,261374	0,279586	0,297866

**Kosovo**

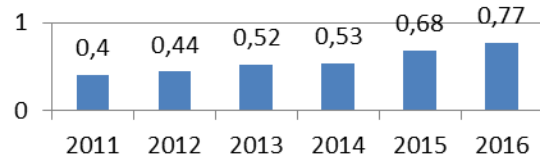
There is no available statistic information for Kosovo reachable via desk research



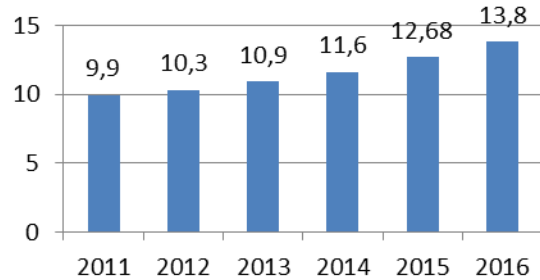
### Albania - Number of foreign tourists mln



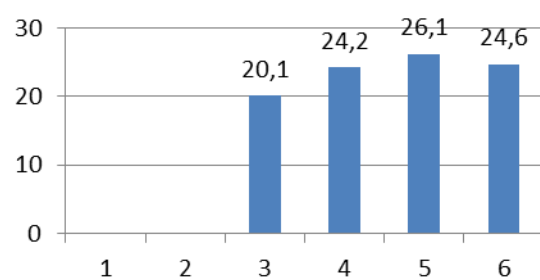
### Bosnia-Herzegovina - Number of foreign tourists mln



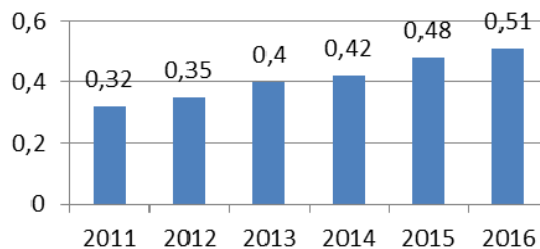
### Croatia - Number of foreign tourists mln



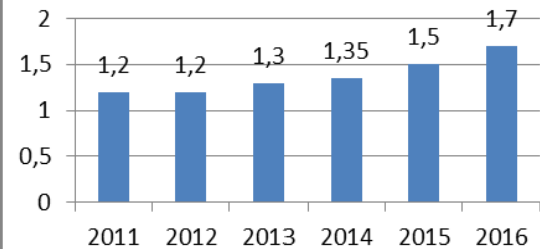
### Greece - Number of foreign tourists mln



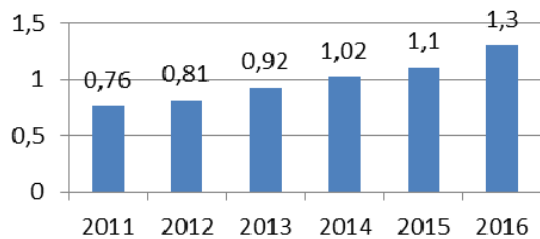
### Macedonia - number of foreign tourists mln



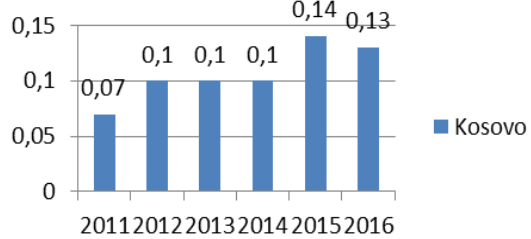
### Montenegro-number of foreign tourists mln



### Serbia - number of foreign tourists mln



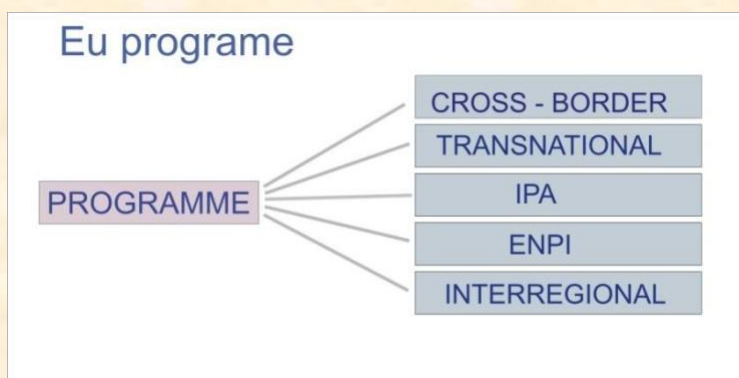
### Kosovo - number of foreign tourists mln



## Funds for tourism by different donor's/funding streams for each country and for regional initiatives

European funds are envisioned as financial instruments that help in the implementation of specific European Union (EU) policies, and countries that are seeking membership. One of the most significant is the cohesion policy for which the EU has allocated 376 billion euros for the time period 2014-2020. The cohesion policy is generally funded and supported by these funds:

1. Cohesion fund
2. European Regional Development fund (for strengthening of the economic and social cohesion and reducing the differences between the countries of the EU)
3. European Social fund- for employment promotion
4. European fund for Agriculture and Rural Development



**IPA cross Border program**<sup>12</sup> - Interreg Instrument for pre-accession Assistance [4] (IPA) II contributes jointly to the pre-accession process for the period 2014-2020. Assistance is provided to 7 candidate countries and potential candidates from the Western Balkans and Turkey. IPA is the instrument established by the EU to strengthen institutional capacity by providing assistance and technical help in administrative, political, social and economic reforms. Budget allocation for IPA 2014-2020: EUR 11.7 billion.

**INTERREG**<sup>13</sup> is a series of five programmes to stimulate cooperation between regions in the European Union, funded by the European Regional Development Fund. It has a budget of EUR 10.1 billion, which represents 2.8% of the total of the European Cohesion Policy budget. Interreg V (2014-2020) covers all 28 EU Member States, 3 participating EFTA countries (Norway, Switzerland, and Liechtenstein), 6 accession countries and 18 neighboring countries.

**Cross border cooperation (CBC)**<sup>14</sup> is a key element of the EU policy towards its neighbors. It supports sustainable development along the EU's external borders, helps reducing differences in living standards and addressing common challenges across these borders. The ENI (European Neighboring Instrument) CBC budget for the period 2014-2020 is a total of EUR 1.052 billion.

<sup>12</sup> [http://ec.europa.eu/regional\\_policy/en/funding/ipa/cross-border/](http://ec.europa.eu/regional_policy/en/funding/ipa/cross-border/)

<sup>13</sup> <https://www.interregeurope.eu/>

<sup>14</sup> [http://ec.europa.eu/neighbourhood-enlargement/neighbourhood/cross-border-cooperation\\_en](http://ec.europa.eu/neighbourhood-enlargement/neighbourhood/cross-border-cooperation_en)

**ERASMUS +** <sup>15</sup>(European Region Action Scheme for the Mobility of University Students) is a European Union (EU) student exchange programme established in 1987. Erasmus+, or Erasmus Plus, is the new programme combining all the EU's current schemes for education, training, youth and sport, which was started in January 2014.

**Leader Program**<sup>16</sup> is an EU initiative to support rural development projects initiated at the local level in order to revitalize rural areas and create jobs. In the current programming period (2014-2020), the LEADER method has been extended to cover not only rural but also coastal (FARNET) and urban areas under the banner of Community Led Local Development (CLLD).

**EU for citizens**<sup>17</sup> - Europe for Citizens (formerly Citizens for Europe) is an EU programme designed to help bridge the gap between citizens and the EU. The programme provides the Union with instruments to promote active European citizenship, put citizens at the center, and offers them the opportunity to fully assume their responsibility as European citizens. The budget for the program is €235 million.

**HORIZONT 20/20**<sup>18</sup> is the biggest EU Research and Innovation programme ever with nearly €80 billion of funding available over 7 years (2014 to 2020). It promises more breakthroughs, discoveries and world-firsts by taking great ideas from the lab to the market. Horizon 2020 is the financial instrument implementing the Innovation Union, a Europe 2020 flagship initiative aimed at securing Europe's global competitiveness.

**COSME**<sup>19</sup> - The Competitiveness of Enterprises and Small and Medium-sized Enterprises (SMEs), is a funding programme that runs from 2014 to 2020 with a current budget of €2.3bn. COSME supports SMEs in 4 key areas: Developing entrepreneurship, Helping SMEs access finance, Supporting SMEs who wish to internationalize their business, Reducing the legislative and regulatory burden on SMEs.

**USAID**<sup>20</sup> - The United States Agency for International Development (USAID) is the United States Government agency which is primarily responsible for administering civilian foreign aid. USAID is the lead U.S. Government agency that works to end extreme global poverty and enable resilient, democratic societies to realize their potential

**IPARD PROGRAM**<sup>21</sup> - The EU has established a new framework for assistance to candidate countries and potential candidate countries by the IPA Council Regulation (EC) No 1085/2006, the Instrument for Pre-Accession Assistance (IPA). The instrument has five components and the Component V of IPA (IPA Rural Development- **IPARD**) supports the policy development as well as the preparation for the implementation and management of the Community's Rural Development Policy, Common Agricultural Policy and related policies.

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<sup>15</sup> [http://ec.europa.eu/programmes/erasmus-plus/node\\_en](http://ec.europa.eu/programmes/erasmus-plus/node_en)

<sup>16</sup> [https://enrd.ec.europa.eu/leader-clld\\_en](https://enrd.ec.europa.eu/leader-clld_en)

<sup>17</sup> [https://eacea.ec.europa.eu/europe-for-citizens\\_en](https://eacea.ec.europa.eu/europe-for-citizens_en)

<sup>18</sup> <https://ec.europa.eu/programmes/horizon2020/>

<sup>19</sup> [http://ec.europa.eu/enterprise/initiatives/cosme/index\\_en.htm](http://ec.europa.eu/enterprise/initiatives/cosme/index_en.htm)

<sup>20</sup> <https://www.usaid.gov/>

<sup>21</sup> <http://ipard.tarim.gov.tr/hdetay-en/37>



**SWISS CONTACT**<sup>22</sup> - Swiss Foundation for Technical Cooperation is a Swiss non-profit-organisation, which carries out projects aiming at reducing poverty in developing and transition countries by private sector development. The main fields of activity are fostering skills development, small and medium enterprises, financial services and resource efficiency. For 2016 it supported 108 projects in 34 countries with funds of around 70 million euro allocated to these projects.

**LIFE Programme**<sup>23</sup> is the European Union's funding instrument for the environment and climate action. The general objective of LIFE is to contribute to the implementation, updating and development of EU environmental and climate policy and legislation by co-financing projects with European added value.

**ERDF**<sup>24</sup> - European Regional Development Fund is a fund allocated by the European Union. Its purpose is to transfer money from richer regions (not countries), and invest it in the infrastructure and services of underdeveloped regions. This will allow those regions to start attracting private sector investments, and create jobs on their own.

**CREATIVE EUROPE**<sup>25</sup> is a €1.46 billion EU programme for the cultural and creative sectors for the years 2014-2020. The general objectives of Creative Europe are: (a) to safeguard, develop and promote European cultural and linguistic diversity and to promote Europe's cultural heritage; (b) to strengthen the competitiveness of the European cultural and creative sectors, in particular of the audiovisual sector, with a view to promoting smart, sustainable and inclusive growth.

**Connecting Europe Facility (CEF)**<sup>26</sup> is EU fund for pan-European infrastructure investment in transport, energy and digital projects which aim at a greater connectivity between EU member states. It operates through grants, financial guarantees and project bonds. It is run by the Innovation and Networks Executive Agency.

**Employment and Social Innovation (EASI)**<sup>27</sup> is a financing instrument at EU level to promote a high level of quality and sustainable employment, guaranteeing adequate and decent social protection, combating social exclusion and poverty and improving working conditions. The total budget for 2014-2020 is €919m.

**HERCULE III**<sup>28</sup> - The Hercule programmes protect the EU's financial interests by supporting action to combat irregularities, fraud and corruption affecting the EU budget. They are administered by the European Anti-Fraud Office, OLAF. Hercule III It is the latest EU anti-fraud programme, and has a budget of €104.9m.

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<sup>22</sup> <http://www.swisscontact.org/en/home.html>

<sup>23</sup> <http://ec.europa.eu/environment/life/>

<sup>24</sup> [http://ec.europa.eu/regional\\_policy/en/funding/erdf/](http://ec.europa.eu/regional_policy/en/funding/erdf/)

<sup>25</sup> <https://ec.europa.eu/programmes/creative-europe/>

<sup>26</sup> <https://ec.europa.eu/inea/en/connecting-europe-facility>

<sup>27</sup> <http://ec.europa.eu/social/main.jsp?catId=1081>

<sup>28</sup> [https://ec.europa.eu/anti-fraud/policy/hercule\\_en](https://ec.europa.eu/anti-fraud/policy/hercule_en)

**Western Balkans Investment Framework (WBIF)**<sup>29</sup> - regional blending facility supporting EU enlargement and socio-economic development in Western Balkans. The WBIF was established in 2009 as a joint initiative of the European Commission, the Council of Europe Development Bank, the European Bank for Reconstruction and Development, the European Investment Bank, and several bilateral donors. The WBIF provides financing and technical assistance to strategic investments in the energy, environment, social, and transport sectors. It also supports private sector development initiatives. As of December 2016, the WBIF has allocated €600 million in grants to Western Balkans, out of which €492 million represents the EU contribution.

**The Berlin Process** is an intergovernmental cooperation initiative aimed at revitalizing the multilateral ties between the Western Balkan countries: Albania, Bosnia and Herzegovina, Macedonia, Kosovo, Montenegro and Serbia and selected EU member states, and at improving regional cooperation in the Western Balkans on the issues of infrastructural and economic development. It is one of the flagship German diplomatic initiatives of the Third Merkel cabinet concerning South-East Europe, together with country-specific ones (e.g. the German-British diplomatic initiative for Bosnia and Herzegovina's EU accession). It is consisted of annual high-level meetings between the six Western Balkan governments and several EU Member States between 2014 and 2018, it aims to reaffirm the region's EU perspective by improving cooperation and economic stability within it. Connectivity is an important aspect of this process, with investment in infrastructure being seen as a means for creating jobs, business opportunities and other benefits. During the Trieste Summit, participants reached an agreement on seven projects, with a total worth of over €500 million, €194 million of which comes from EU grant co-financing, loans from institutions such as the European Investment Bank (EIB) and the European Bank for Reconstruction and Development (EBRD), and national financing. Creating high-level political connections, reconciling societies by stimulating youth exchange and education projects, and resolving outstanding bilateral disputes, while ensuring civil society participation in the whole process, are other significant aspects of this initiative. In 2016 also in the framework of the Berlin process, the Regional Youth Cooperation Office (RYCO) was launched, which provides funding for regional cooperation initiatives (such as public university exchanges and language schools within the countries of the Western Balkans), and its total annual budget is €2 million.

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<sup>29</sup> <https://www.wbif.eu/>

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## 4 BEST PRACTICES IN TOURISM DEVELOPMENT

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<b>Models that have proved to be successful</b>
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An example of successful and effective cooperation is the project "**Dinaric Arc Parks**"<sup>30</sup> financed by the Norwegian Ministry of Foreign Affairs and the MAVA Foundation and in cooperation with the civil and public sectors using European regulations for protection of the environment and nature. The three-year project started in 2012, includes 8 countries: Albania, Bosnia and Herzegovina, Croatia, Kosovo, Macedonia, Montenegro, Serbia and Slovenia. This network of parks with their cultural and natural values can compete with the Carpathian Mountains and the Alps as well as other world renowned regions.

A successful model that has showed great results in the field of regional cooperation and enrichment of the tourism offer of the region is the project "**Peaks of the Balkans**" realized between Albania, Kosovo and Montenegro.<sup>31</sup> The project consisted of creation of international mountain trails which connect the 3 countries and the hikers can enter the other countries with prior notice and explore the natural attractions of all 3 countries in one route. As a follow-up of this project, a new one started between Macedonia, Albania and Kosovo named "Balkan Hiking Adventure".

**Via Dinarica** is a mega trail, similar to the Via Alpina and Appalachian Trail concepts, which connects seven countries that encompass the Dinaric Alps mountain range. It bridges the entire Dinaric Alps chain from Slovenia to northern Albania and western Kosovo- and everything in between - including the heart of the trail in Croatia, Bosnia and Herzegovina, Montenegro, and Serbia. It is a tourism product that includes 19 UNESCO World Heritage Sites, 20 National Parks, 240 mountains, 2,000 kilometers of hiking and biking trails, and over 2,200 km of supreme waterways.<sup>32</sup> The challenge is to transform this enormous potential into a reality that will provide sustainable livelihoods for those living along its path and provide a major boost to both the economy and the image of the region on a whole.

According to the Regional Cooperation Council<sup>33</sup>, it is estimated that in 2014 travel and tourism directly supported over 300,000 jobs in the seven countries along the Via Dinarica. A fully functional and well promoted Via Dinarica could significantly increase those figures, particularly for the most vulnerable populations – rural and youth. Over the past few years, the Via Dinarica has emerged as a regional tourism destination that offers world-class hiking, cycling, skiing, fly-fishing, kayaking, rafting, caving, and a plethora of opportunities to explore the unique traditional lifestyles and cuisine is stated in their expert's articles. The Via Dinarica's slogan – Connecting Naturally – does exactly that. It transcends political and national borders by recognizing, preserving, and promoting the common natural and cultural heritage the people of the region share.

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<sup>30</sup>[http://wwf.panda.org/what\\_we\\_do/how\\_we\\_work/protected\\_areas/pa4lp/dinaric\\_arc/](http://wwf.panda.org/what_we_do/how_we_work/protected_areas/pa4lp/dinaric_arc/)

<sup>31</sup><https://www.giz.de/fachexpertise/downloads/giz2014-en-orf-peaks-of-the-balkans-trail.pdf>

<sup>32</sup>[www.viadinarica.com](http://www.viadinarica.com)

<sup>33</sup><http://www.rcc.int/seeds/focus/3/tourism--how-to-present-the-beauty-of-our-common-home>



### **The Western Balkans – Land of Discovery**

A National Geographic Traveler & USAID special supplement<sup>34</sup> – The Western Balkans – Land of Discovery included 46 outstanding ways to Experience Albania, Bosnia and Herzegovina, Kosovo, Macedonia, Montenegro and Serbia. It explained the area’s cultural and natural complexity fragmented throughout the countries of the region. The Western Balkans–Land of Discovery Geo-tourism website, created through a collaborative process, highlighted the cultural, historic, and natural assets unique to this region. Through this partnership, the region benefited from media and online exposure deriving from the National Geographic’s considerable expertise.

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<sup>34</sup>[https://www.westernbalkans.org/http://www.rciproject.com/tourismng\\_files/NG%20Western%20Balkans%20supplement.pdf](https://www.westernbalkans.org/http://www.rciproject.com/tourismng_files/NG%20Western%20Balkans%20supplement.pdf)

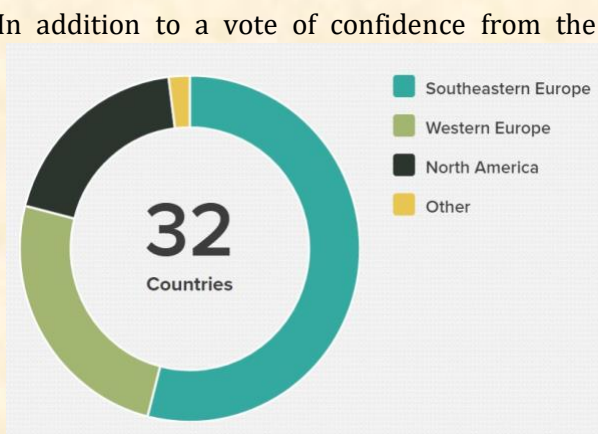
**Regional initiatives, including research, policies, strategies and projects**  
**Importance of regional cooperation, sharing of experiences and drawing lessons for initiatives, projects and models**

There are several worthwhile initiatives for regional development and collaboration: forums, fairs, research, policies, models etc. From these we can see the ways and potential for connecting the countries in the region.

[Balkans & Black Sea Cooperation Forum](#) (BBSF), the first ever conference in the Balkans & Black Sea Region was held on May 25th & 26th 2017, at [Serres](#), Greece. The main theme of the 1st BBSF, “Cultural Tourism, a key to Sustainable Growth”, is in line with the [UN resolution](#) declaring 2017 as the International Year of Sustainable Tourism for Development. The Forum aims at highlighting cross-border cooperation, enhancing bilateral and multilateral relations, strengthening business opportunities and promoting economic growth and sustainable development among the 17 countries in the region (in alphabetical order): Albania, Armenia, Azerbaijan, Bosnia-Herzegovina, Bulgaria, Georgia, Greece, Croatia, Moldova, Montenegro, Ukraine, Macedonia, Romania, Russia, Serbia, Slovenia and Turkey.

### **AdventureNEXT**

Led by the Adventure Travel Trade Association (ATTA)<sup>35</sup> and hosted by destination partner Macedonia (The Agency for Promotion and Support of Tourism in Macedonia)<sup>36</sup>, the adventure tourism conference placed particular focus on Southeast Europe destinations, including Macedonia, Albania, Bosnia and Herzegovina, Bulgaria, Croatia, Greece, Kosovo, Montenegro, Romania, Serbia, Slovenia and Turkey. The intent of the international gathering was to gain momentum for a progressive form of tourism that leaves positive local economic benefit throughout the region, while helping to protect, preserve and thoughtfully expose its vast culture and natural richness to high value global travelers. During one week, nearly 300 representatives from more than 30 destinations worldwide – including 12 destinations in southeastern Europe – gathered for AdventureNEXT<sup>37</sup> Balkans in Ohrid, Macedonia. Below is a visualization of the attendees by market regions (credits ATTA):



In addition to a vote of confidence from the United Nations World Tourism Organization (UNWTO)<sup>38</sup>, which presented to the delegation, the Regional Cooperation Council (RCC) also recognized the event as important and held their bi-annual Tourism Expert Group Meeting during AdventureNEXT. The United States Agency for International Development (USAID) and the Swiss Agency for Development and Cooperation were also key development partners of the event, both of which are stimulating local economic growth and small business expansion through the development of adventure travel.

This event resulted in publicity for the western Balkans in the targeted media and established market relations between local companies and targeted markets.

<sup>35</sup><https://www.adventuretravel.biz/>

<sup>36</sup><http://macedonia-timeless.com/>

<sup>37</sup><https://www.adventuretravel.biz/events/adventurenext/balkans-2016/>

<sup>38</sup><http://www2.unwto.org/>

### **OPENS Youth Fair 2016**

The Fifth Regional Fair of Youth Tourism “OPENS Youth Fair 2016”<sup>39</sup> held in Novi Sad brought together in one place the most attractive cities in the region with various festivals and events. The participants of the fair included exhibitors and guests from Slovenia, Croatia, Bosnia and Herzegovina, Serbia, Montenegro and Hungary. This entire project can be viewed in the context of the just completed Conference in Paris<sup>40</sup>, where the leaders of the Western Balkan countries signed the agreement on the establishment of the Office for Youth Cooperation. The aim of the fair is to position the Balkans by means of joint regional promotion as one of the most attractive destinations for young people in the world. Youth tourism is a great potential for all countries of the Western Balkans: an ITB Berlin study on world travel trends<sup>41</sup> suggests that the ‘Millennials’ generation are a large market segment who have particular characteristics such as the desire for authentic cultural experiences and who use technology extensively.

### **UNIDO organises Balkans regional conference on tourism and cluster-based local economic development**

Tourism in the Balkans and the sector’s role in sustainable economic development was the focus of a conference that was held in May 2015 in Skopje. The two-day event was organized in collaboration with the Ministry of Economy as part of UNIDO’s<sup>42</sup> ongoing project that is helping the tourism industry of Macedonia foster sustainable linkages. The project is funded by the Government of Slovenia.

### **Health tourism research-The challenges of developing health tourism in the Balkans<sup>43</sup>**

This research analyses some of the challenges of developing health tourism in the Balkan region. It focuses on eleven countries, namely Albania, Bosnia and Hercegovina, Bulgaria, Croatia, Greece, Macedonia, Montenegro, Romania, Serbia, Slovenia and Turkey. Although the region has a long history and traditions of health tourism including balneology and spas, it has been difficult to develop destinations and facilities beyond domestic, state-supported tourism. The reasons for this are numerous, including instability and conflict, political mismanagement and corruption, lack of funding, limited infrastructural development, poor levels of service, and inadequate marketing. In order to research further the challenges and opportunities for health tourism in the Balkan region, a two-round Delphi study was undertaken with health tourism experts with a special interest in the Balkan region.

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<sup>39</sup><http://www.youth-fair.com/english.html>

<sup>40</sup><https://rycowesternbalkans.org/>

<sup>41</sup>[http://www.itb-berlin.de/media/itb/itb\\_dl\\_all/itb\\_presse\\_all/World\\_Travel\\_Trends\\_Report\\_2016\\_2017.pdf](http://www.itb-berlin.de/media/itb/itb_dl_all/itb_presse_all/World_Travel_Trends_Report_2016_2017.pdf)

<sup>42</sup><http://www.unido.org/>

<sup>43</sup><http://www.globalwellnesssummit.com/wp-content/uploads/Industry-Research/Europe/2016-Balkan-Wellbeing-Final-Report.pdf>



## 5 KEY TOURIST ATTRACTIONS BY COUNTRY

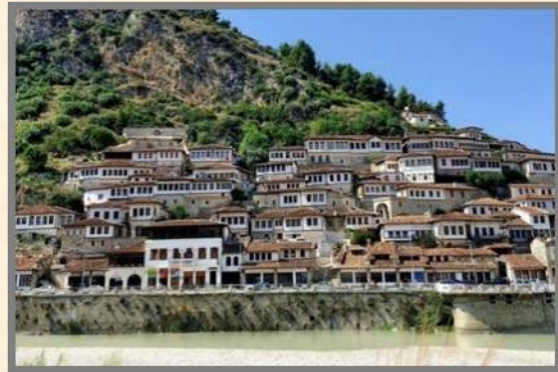
Below is a brief list of most well-known destinations in each of the countries of focus. It is a real challenge to list all the attractions per country, and even harder to keep the description for each one of them short. The selection of the destinations was made based on desk research of most popular destinations in online travel agencies listings (OTAs) and online information services for tourism.

### Albania

- ✓ **The Accursed Mountains** - The 'Accursed Mountains' (Bjeshkët e Nemuna) offer some of Albania's most impressive scenery, and the area's popularity has exploded in recent years as a backpacker destination. It's the opposite side of the country to the attractions of its impressive coastline.



- ✓ **Berat** - Its most striking feature is the collection of white Ottoman houses climbing up the hill to its castle, earning it the title of 'town of a thousand windows' and helping it join Gjirokastra on the list of UNESCO World Heritage sites in 2008.<sup>44</sup>



- ✓ **Drymades** - Heading south from Palasa, the next beach along the Albanian Riviera is Drymades.



- ✓ **Tirana** - Lively, colorful beating heart of Albania, a vibrant whirl of traffic, consumerism and unfettered fun.

- ✓ **Gjirokastra** - Defined by its castle, roads paved with limestone and shale, imposing slate-roofed houses and views out to the Drin Valley, Gjirokastra is a magical hillside town described beautifully by Albania's most famous author, Ismail Kadare (b 1936), in Chronicle in Stone.

<sup>44</sup><http://whc.unesco.org/en/list/569>

## Bosnia and Herzegovina

- ✓ **Mostar** - World-famous Stari Most (Old Bridge) is Mostar's indisputable visual focus. The bridge's swooping arch was originally built between 1557 and 1566 on the orders of Suleyman the Magnificent.



- ✓ **Sarajevo** - Bosnia's capital has a delightful Ottoman-era centre ringed by Austro-Hungarian architecture, all set deep within a mountain valley blushing with red-tiled roofs and dotted with minarets. It's a photogenic, friendly city. Yet most visitors associate it with war.

- ✓ **Bjelašnica** - Bosnia's second Olympic ski field rises above the modest resort of Bjelašnica, around 30km south of Sarajevo. An attraction here is floodlit night skiing (6.30pm to 9pm) and, in summer, the possibilities of exploring the magical mountain villages behind.



- ✓ **Višegrad** was the setting for Nobel Prize-winning Bosnian author Ivo Andrić's masterwork, Bridge on the Drina, whose main 'character' is a real-life 1571 Unesco-listed stone bridge.



- ✓ **Trebinje** is barely 30km from Dubrovnik, Croatia. It is worth visiting for the walled Old Town and a historic stone bridge, wine tastings, orthodox churches and a lovable square with a French-Provencale vibe.





## Kosovo

- ✓ **Peja/Peć** is Kosovo's third-largest city. With a Turkish-style bazaar at its heart and the dramatic but increasingly accessible Rugova Mountains all around it, it's a diverse and progressive place that's fast becoming Kosovo's tourism hub.

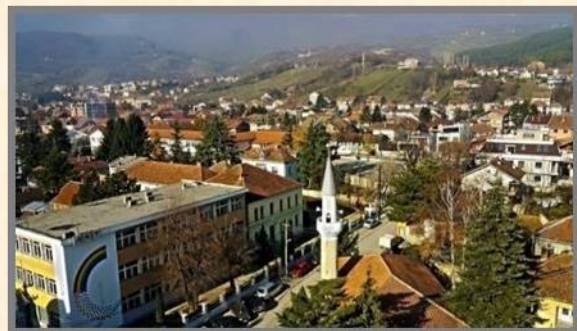


- ✓ Picturesque **Prizren** is Kosovo's second city. The charming mosque-and church-filled old town is well worth setting aside a few hours to explore, and the castle high above the city is a must-see.

- ✓ **Rugova** – A scenic canyon full of waterfalls and springs that run from the steep sides expanding into high mountains full of pastures. The Rugova area is part of Peaks of the Balkans and Via Dinarica traverses. As well as hiking and biking, it offers Via Ferrata experience, staying in mountain houses and off-road jeep safari.



- ✓ **Pristina** is a fast-changing city that feels full of optimism and potential, even if its traffic-clogged streets and mismatched architectural styles don't make it an obviously attractive place. It is the capital of Kosovo and due to the transport connections is a part of every visit to Kosovo.



- ✓ **Deçan/Dečani** - One of Kosovo's absolute highlights, with its ancient monastery is in an incredibly beautiful spot beneath the mountains and surrounded by a forest of pine and chestnut trees. It's on the outskirts of Deçan/Dečani, 15km south of Peja.





## Macedonia

- ✓ **Ohrid old town** - Sublime Ohrid (Охрид) is Macedonia's most seductive destination, with an atmospheric old quarter cascading down a graceful hill, crammed full of beautiful churches and topped by the bones of a medieval castle. Its cobbled streets are full of traditional restaurants and lakeside cafes, but it's not a complete tourist circus just yet and retains a lived-in feel.



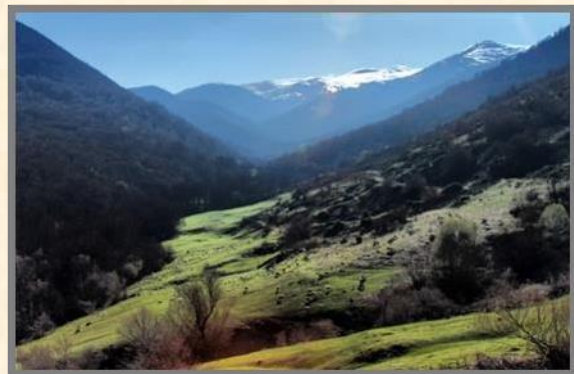
- ✓ **Skopje** - Ottoman sights are focused around the city's delightful Čaršija (old Turkish bazaar), bordered by the 15th-century Kameni Most (Stone Bridge) and Tvrđina Kale Fortress – Skopje's guardian since the 5th century. This combined with the brutalism architecture of the 70's and the “baroque fever” of 2014 that marks the city center, forms a vivid memory about Macedonia's capital.

- ✓ **Pelister** - Macedonia's oldest national park (1948) covers 171 sq km of the country's third-highest mountain range, the quartz-filled Baba massif. Eight peaks top 2000m, crowned by Mt Pelister (2601m). Two glacial lakes, known as 'Pelister's Eyes', sit at the top.



- ✓ **Western mountain range:** Shara, Mavrovo, Korab – The south-most part of the Dinaric Alps

- ✓ **Berovo** – the Eastern-most mountainous area in Macedonia is the unexplored but emerging destination for activity and rural tourism. Calm picturesque villages offer rest in the sounds and aroma of untouched pine forests. Family run farms are happy to host you for lunch if you reach their place by hiking or biking via off-road trails.



## Croatia

- ✓ **Dubrovnik** - Regardless of whether you are visiting Dubrovnik for the first time or the hundredth, the sense of awe never fails to descend when you set eyes on the beauty of the old town. Indeed, it's hard to imagine anyone becoming jaded by the city's white limestone streets, baroque buildings and the endless shimmer of the Adriatic, or failing to be inspired by a walk along the ancient city walls that have protected a civilized, sophisticated republic for centuries.



- ✓ **Plitvice** - Within the boundaries of this heavily forested national park, 16 crystalline lakes tumble into each other via a series of waterfalls and cascades. The mineral-rich waters carve through the rock, depositing tufa in continually changing formations. Clouds of butterflies' drift above the 18km of wooden footbridges and pathways that snake around the edges and across the rumbling water.



- ✓ **Istria** - The bucolic interior of rolling hills and fertile plains attracts artsy visitors to Istria's hilltop villages, rural hotels and farmhouse restaurants, while the verdant indented coastline is enormously popular with the sun-and-sea set.



- ✓ **Split** - Croatia's second-largest city is a great place to see Dalmatian life as it's really lived. Always buzzing, this city has just the right balance of tradition and modernity. Step inside Diocletian's Palace and you'll see dozens of bars, restaurants and shops thriving amid the atmospheric old walls where Split life has been humming along for thousands of years.
- ✓ **Krka** - Extending along the 73km River Krka, the Krka National Park runs from the Adriatic near Šibenik inland to the mountains of the Croatian interior. It's a magical place of waterfalls and gorges, with the river gushing through a karstic canyon 200m deep. Sights built by humans are also a major draw of the region, the area's remoteness attracting monks who constructed their monasteries here



## Greece

- ✓ **Athens** - With equal measures of grunge and grace, Athens is a heady mix of history and edginess. Cultural and social life plays out amid ancient landmarks. The magnificent Acropolis, visible from almost every part of the city, reminds Greeks daily of their heritage and the city's many transformations.



- ✓ **Meteora** - This World Heritage site is an extraordinary place and one of the most visited in all of Greece. The massive pinnacles of smooth rock are ancient and yet could be the setting for a futuristic science-fiction tale, or an ancient one. The monasteries atop them add to the strange and beautiful landscape.



- ✓ **Santorini** - With multicoloured cliffs soaring above a sea-drowned caldera, Santorini looks like a giant slab of layered cake. The main island of Thira will take your breath away with its snow-drift of white Cycladic houses lining the cliff tops and, in places, spilling like icy cornices down the terraced rock. When the sun sets, the reflection on the buildings and the glow of the orange and red in the cliffs can be truly spectacular.



- ✓ **Olympus Mountain** - The cloud-covered lair of the Ancient Greek pantheon, awe-inspiring Mount Olympus is simply spectacular. It fires visitors' imaginations today, just as it did for the ancients who believed its peaks are the home of the gods. Greece's highest mountain, Olympus became Greece's first national park in 1938. Its slopes are thickly forested and its peaks often shrouded in fog.

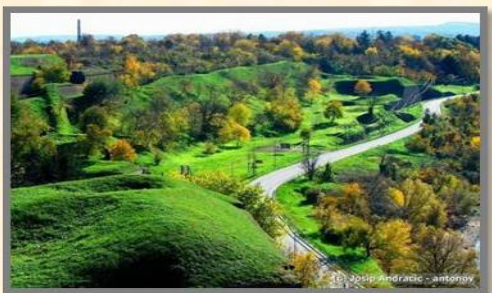


- ✓ **Crete** - Crete's most famous historical attraction is the Palace of Knossos, the grand capital of Minoan Crete, located 5km south of Iraklio. The setting is evocative and the ruins and recreations impressive, incorporating an immense palace, courtyards, private apartments, baths, lively frescoes and more.



## Serbia

- ✓ **Zlatibor** - A romantic region of gentle mountains, traditions and hospitality, Zlatibor encompasses the Tara and Šargan mountains in the north and the Murtenica hills bordering Bosnia and Hercegovina. The quirky little village of Mokra Gora is found in Zlatibor's west. The region's name itself serves as poetic introduction; Zlatibor means 'golden pine'.
- ✓ **Belgrade** - Outspoken, adventurous, proud and audacious with its gritty exuberance that makes it one of the most happening cities in Europe. While it hurtles towards a brighter future, its chaotic past unfolds before your eyes: socialist blocks are squeezed between art nouveau masterpieces, remnants of the Habsburg legacy contrast with Ottoman relics.
- ✓ **Djerdap canyon** - Serbia's largest national park (636 sq km) is also one of its most dramatic, with arresting attractions both natural and man-made enticing thousands of visitors each year. Billed as one of Serbia's seven wonders, the awe-inspiring Iron Gates gorge is the park's main draw, as well as the museums that feature Neolithic findings of the area.
- ✓ **Frushka Gora** - is an 80km stretch of rolling hills in the Vojvodinian district of Srem, where cloistered life has endured for centuries and you can still see 16 monasteries built between the 15th and 18th centuries. Fruška Gora is also famous for its small but select wineries; grapes were first planted here in 3 AD by the Roman Emperor Probus.
- ✓ **Museum of Yugoslavia** - This must-visit museum houses an invaluable collection of more than 200,000 artefacts representing the fascinating, tumultuous history of Yugoslavia. Photographs, artworks, historical documents, films, weapons, priceless treasure; it's all here. Tito's grave is also on the museum grounds.





## Montenegro

- ✓ **Kotor** - Wedged between brooding mountains and a moody corner of the bay, the achingly atmospheric Kotor is perfectly at one with its setting. The town is a medieval maze of museums, churches, cafe-strewn squares and Venetian palaces and pillories. It's a dramatic and delightful place where the past coexists with the present; its cobblestones ring with the sound of children racing to school in centuries-old buildings, lines of laundry flutter from wrought-iron balconies, and hundreds of cats – the descendants of seafaring felines loll in marble laneways.



- ✓ **Durmitor** - The impossibly rugged and dramatic Durmitor is one of Montenegro's – and Mother Nature's showpieces. Carved out by glaciers and underground streams, Durmitor stuns with dizzying canyons, glittering glacial lakes and nearly 50 limestone peaks soaring to over 2000m; the highest, Bobotov Kuk, hits 2523m. From December to March, Durmitor is a major ski resort, while in summer it is popular for hiking, rafting and other active pursuits.



- ✓ **St. Stefan** - Sveti Stefan has unsurprisingly been named as Montenegro's most-photographed site. A fortified island village connected to the mainland by a narrow causeway, its photogenic jumble of 15th-century stone villas overlooks an impeccable pink-sand beach and tempting turquoise waters.



- ✓ **Ostrog Monastery** - Resting improbably – miraculously – in a cliff face 900m above the Zeta valley, the gleaming white Ostrog Monastery (Manastir Ostrog) is the most important site in Montenegro for Orthodox Christians, attracting up to a million visitors annually. Even with its numerous pilgrims, tourists and souvenir stands, it's a strangely affecting place.



- ✓ **Tara Canyon** - Slicing through the mountains at the northern edge of the national park, the Tara River forms one of the world's deepest canyons (1300m; the Grand Canyon plummets a mere 200m deeper). The best views are from the water, and rafting along the river is one of the country's most popular tourist activities.



## National Parks

Macedonia

• National park- Galicica • Mavrovo • Pelister

Serbia

• National park- Frushka Gora • Djerdap • Tara • Kopaonik

Croatia

• Brijuni • Kornati • Krka • Mljet • Paklenica • Plitvickajezero • Risnjak  
• Sjeverni Velebit

Montenegro

• National park Durmitor • Lovćen • Biogradska gora • Prokletije •  
Skadarskojezero

Greece

• National park- Enos • Aponisos • Eta • Olimp • Parnas • Parnita •  
Pind • Prespa • Samarija • Sunion • Vicos-Aos • Zakintos

Bosnia and Herzegovina

• National Park Sutjeska • Kozara • Una

Albania

• Blue Eye

Kosovo

• National Park Sharri; National Park Bjeshkët e Nemuna



## Archeological cites

### Macedonia

• Ancient Theatre of Ohrid • Bara Tumba • Bargala • Bylazora • Cerje, Skopje • Church of St. John at Kaneo • Church of Saints Clement and Panteleimon • CocevKamen • DamastionDolnoGradište • *Estipeon* • Golem Grad • Heraclea Lyncestis • Idomenae • Kočani medieval towers • Kokino • Ohrid • Plaošnik • Prosek • Saint Erasmus, Ohrid • Skopje Aqueduct • Stobi • Stone town of Kuklica • Tauresium • Trebeništa • TumbaMadžari • Vardarski Rid • VeluškaTumba • Viničko Kale

### Serbia

• Archaeological Site Pionirski Park • Bassianae • Belgrade Fortress • Brežde • Church of the Holy Apostles Peter and Paul, Ras • Čurug • Damastion • Gamzigrad • Gënsis (vicus) • Gradina on Bosut • Hadži-Prodan's Cave • HisarLeskovac • Jánja Monastery • Juhor • Kale-Krševica • Kaljaja (Balovac) • Kaljaja (Teneš Do) • Kinda • Kosmaj • Koviljkin grad • Krakul Jordan • Lazarica Church • Mediana • Medvednjak • Mihailovac • Jadar Museum • *Museum in Loznica* • Pešturina • Petrovaradin Fortress • Pločnik (archaeological site) • Remesiana • Roma Emperors Route • RudnaGlava • Sićevo Gorge • Sirmium • Stapani • Starčevo • Svileuva • Tašmajdan Park • Trojanov Grad • Velikahumka • Vidin Grad • Viminacium • *VreloŠarkamen* • Židovar

### Croatia

• Aquaelasae • Arch of the Sergii • Bijaći • Bilina, Croatia • Bribir, Šibenik-Knin County • Burnum • Cathedral of Saint Domnius • Cetina • Church of Holy Salvation, Cetina • Church of St. Donatus • Church of St. Dunat • Đevrske • Diocletianus Aqueduct • Golubić, Šibenik-Knin County • Grapčeva cave • Hollow Church • The Ivinj archeological site with Saint Martin's Church • Krapina • Krapina Neanderthal site • Modruš • Narona • Nesactium • Otišić • Peruća Lake • Prozor Fortress • Pula Arena • Salona • Smrdelje • SvetaJelena • Temple of Augustus, Pula • Vela Spila • Vindija Cave • Vrana (town)

### Montenegro

• Duklja (grad) • Obod (Crna Gora) • PredistaKrajinska • Svac • Tablja • ZabijakCrnojevića • Ostrog Monastery • Moraca Monastery

### Greece

• Areopag • MountAthos • Knos • Akcij • Akrokorint • Achropolis of (Athens) • Delfi • Epidaur • Filipi • Heraion • Bassae • Colossus of Rhodes • Lion Gate • Mikeña • Olympia • Pitagoreion • Tirint • Vergina • Pella • Corfu Alogonia (town) • Ancient Thera • Calydon • Daskalio • Excavations at Delphi • Eva, Arcadia • Koufonisi (Crete) • NeosPanteleimonas • Onchestos • Pyra of Herakles • Toumba • Vaphio

### Bosnia and Herzegovina

• Badanj Cave • Blagaj Fort • Blidinje • Cim (archaeological site) • Kotor (Bosnia) • Mogorjelo • Neretva • Pod, Bosnia and Herzegovina • St. John Cemetery (Livno)

### Albania

• Butrint • Berat • Gjirokastra • Porto Palermo • Byllis • Apollonia • Scutari • Durres

### Kosovo

• Gijllak (archaeological site) • Harilaq Fortress • Gracanica Monastery • Municipium DD • Municipium Ulpiana-Justiniana Secunda • Novo Brdo Castle • The archaeological site of Vlashnje

**Especially significant for the Balkan region are the UNESCO protected heritage sites which help place the Balkans on the world tourist map.**

## *Unesco protected heritage sites*

Macedonia	<ul style="list-style-type: none"><li>• Ohrid region</li></ul>
Serbia	<ul style="list-style-type: none"><li>• Felix Romuliana</li><li>• Sopoćani Monastery</li><li>• Studenica Monastery</li></ul>
Croatia	<ul style="list-style-type: none"><li>• Episcopal Complex (Poreč)</li><li>• Traù-Trogir</li><li>• Palace of Diocletian (Split)</li></ul>
Montenegro	<ul style="list-style-type: none"><li>• Bay of Kotor</li><li>• Durmitor National Park</li></ul>
Northern Greece	<ul style="list-style-type: none"><li>• Vergina</li><li>• Corfu Old Town</li><li>• Salonika</li><li>• Meteora</li><li>• Mount Athos</li></ul>
Bosnia and Herzegovina	<ul style="list-style-type: none"><li>• Višegrad Bridge</li><li>• Mostar</li></ul>
Albania	<ul style="list-style-type: none"><li>• Butrint</li><li>• Berat</li><li>• Gjirokastra</li></ul>
Kosovo	<ul style="list-style-type: none"><li>• Kosovo is not a UNESCO member</li></ul>



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## 6 RECOMMENDATIONS

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### Potential for seasonal investments

The countries of focus have exceptional potential for development of a tourism product which isn't dependent on the classic tourism seasons. There are numerous ways in which the product offered can lengthen the seasonal form of tourism such as:

- Development of alternative forms of tourism: Eco-tourism, Cultural tourism, Rural tourism.
- Active tourism (hiking, mount biking, paragliding, alpinism) are forms which can be used during most of the year which will lengthen the classic tourism season.
- Another model which can provide offer throughout the whole year is utilizing the summer vacation spots for a specific target group consisting of older people from other European countries who can spend their vacations there in off season with a special programme and activities designed to suit their needs. The Balkan region has a potential for this kind of tourism product since it has all the resources needed for developing the offer.

Such potential has been explored, experimented with and delivered to some extent. The results vary both between countries, as well as between different regions in the countries included within this research. So far we are not familiar with the existence of a study that will cover the overall Balkan area, but detailed information can be found most often published by local or national tourism authorities, or even by independent travel authorities like the ATTA.<sup>45</sup>

### Challenges

The region with countries of focus is rich in globally significant cultural and natural assets. The competitiveness of this region as a travel destination lies in its rich historical heritage, authentic culture and well-preserved nature. The image of an undiscovered part of Europe sprinkled with historical sites, stunning landscapes, and authentic communities attracts travelers interested in exploration and off-the-beaten-path experiences. While each individual country has a lot to offer, the joint marketing of the region as one destination enhances the competitiveness of the entire region. For many travelers, especially those from further afield, the ability to combine two or more countries into one itinerary based on specific interests or convenience is a large factor in the ultimate purchase decision.

Unfortunately, uneven economic development, socio-political dynamics associated with the break-up of former Yugoslavia, and severe military conflicts of the near past, including unresolved issues between the countries has made cooperation in the region difficult. To function as one integrated travel destination (as frequently desired from the demand perspective) countries in the region must establish effective cooperation to develop joint tourism products (cross-border routes, common themes, joint attractions, etc.), deliver authentic regional experiences and market them selves as one destination.

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<sup>45</sup><https://www.adventuretravel.biz/research-old/atta-balkans-adventure-report/>



To counterbalance their serious socio-economic challenges, Western Balkan countries possess a wealth of natural and cultural assets. They are home to ten UNESCO World Heritage Sites<sup>46</sup>, vast areas of protected lands with habitats of rare or indigenous animal and plant species, ancient and colourful traditions, arts, rituals and other intangible cultural heritage (some of which is also included in the UNESCO ICT List). Despite the globally recognized value of these assets, some of them have been subject to poor management due to limited funds and lack of capacity. The problem is exacerbated by low public awareness and poverty-driven illegal activities such as poaching, felling, treasure hunting, etc. Amidst this complex combination of challenges, many valuable assets with potential of becoming vibrant tourism attractions remain underutilized and hidden for the world traveler. The lack of development of these sites is also associated with missed opportunities for revenue generation and other benefits for local stakeholders.

In summary, the major challenge for Western Balkans countries is to overcome differences and find a way to collaborate to benefit from the opportunity that the wealth of natural and cultural assets offers. The tourism industries in the countries need to expand their thinking and connect with partners in neighbouring countries to begin joining their offerings in a regional sustainable tourism portfolio. In addition, they need to begin positioning themselves as one singular destination that invites travelers for exploration and adventure.<sup>47</sup>

### **Here is a true story of passionate UK tourist, frequently travelling to the Western Balkans**

“Since visiting Albania, Kosovo and Macedonia in the early 2000s, I have visited the region many times, most recently visiting Slovenia and Croatia in 2015 and Montenegro in 2017. On these trips, travel within the region has been varied in its availability, cost and type. Travel within Albania and Kosovo was easiest with a private driver and guide. Bus and rail travel were difficult to access, however travelling between Skopje and Tirana was possible by bus.

In 2015, my wife Rachel and I travelled to the region from London in our own car, via France, Germany and Austria. We stayed in Slovenia and Croatia during this trip so stayed within the borders of the EU. We were unsure of the requirements for visas, insurance etc. for travel outside of the EU, for instance to visit Bosnia and Herzegovina. This helped to make the decision to stay in the EU. We did use the quick, cheap and reliable train between Ljubljana and Zagreb to visit those two cities without our car.

In September of this year (2017), we visited Montenegro. I travelled there from Italy by overnight ferry from Bari to Bar and Rachel joined me by flying from London to Podgorica both of which made entering the country easy and relatively inexpensive. Within Montenegro we travelled between Bar, Podgorica, Cetinje, Budva and Kotor by bus but, in order to visit the Mausoleum of Petar II, we needed to hire a car and drive there. This was relatively easy and inexpensive from a local car hire company in Budva. From our base there we did not find a quick and easy way of visiting southern Croatia including Dubrovnik which we aim to visit at some point in the future.

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<sup>46</sup>[http://whc.unesco.org/en/list/?search=balkan&id\\_sites=&id\\_states=&id\\_search\\_region=&id\\_search\\_by\\_synergy\\_protection=&id\\_search\\_by\\_synergy\\_element=&search\\_yearinscribed=&themes=&criteria\\_restriction=&id\\_keywords=&type=&media=&order=country&description=](http://whc.unesco.org/en/list/?search=balkan&id_sites=&id_states=&id_search_region=&id_search_by_synergy_protection=&id_search_by_synergy_element=&search_yearinscribed=&themes=&criteria_restriction=&id_keywords=&type=&media=&order=country&description=)

<sup>47</sup> -Taken from USAID Case study: *Tourism Development in the Western Balkans-*

Our accommodation, rented apartments, hotels and camp sites across the region have all been of a high standard and the restaurants, bars and cafes we have visited have, on the whole, been very good serving the unique food and drink of each part of the region.

Overall, I would recommend the Western Balkans to any British, Western European or American traveller as a beautiful and interesting place to visit but, for more people to visit, some areas of infrastructure, particularly transport need some improvement.

Dave Ward, London UK.”

### Recommendations

The briefing gives us useful instruments for creating a unified strategy for development of the Balkan region:

- The sooner the joint action for realization and affirmation of the Balkan as a unified tourist destination gets more momentum, the faster we will see significant changes, and the economic benefits can be reaped by all the countries of the Balkan, while also reducing the differences which are at the moment an obstacle for individual development and growth.
- The immense cultural, historical, natural and anthropological riches and the specifics which the region has is a potential which will enable the Balkan region to become a recognizable and desired tourist destination.
- People who reside in the Balkans have a deeply rooted sense of belonging to their own traditions and country, which is evident even in the dynamic of modern life. This serves as a double premise for achieving results with a project for integrated development of the whole Balkan region.
- The vast existing resources the region, and the continuous search for new travel destinations, can solidify the Balkans as a popular destination on a global scale.
- Alternative forms of tourism and the development of a tourist offer in rural areas is a challenge for European tourism as shown by the latest trends in tourism demand, like the research of CBI<sup>48</sup>. This can be seen by the researches and the attention given by the European community to the introduction of programs for support, development and integration in rural areas.
- At the conference in Skopje, Macedonia in 2015 the President of the UN World Tourism Organization Thaleb Rifai stated that the Balkan is a future tourist destination based on all the potential it has and the needs of the tourists worldwide. For that reason, an integrated and regional action is needed for a much faster and more efficient development and creation of regional tourist products.

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<sup>48</sup> <https://www.cbi.eu/market-information/tourism/trends/>

**Summaries of the present situation and challenges in each country of focus individually, referring only to the points we consider are important for common and integrated growth:**

**Croatia** is highly developed when it comes to tourism; it has the longest tradition in tourism and the highest standards of service among Balkan countries. Many of the target tourists that visit Croatia are not on the target list of other Balkan countries. In any case, Croatia is the best 'gateway' to the Balkans as its marketing and image reaches a wider audience than most of the other Balkan countries together.

**Greece** is a well-known destination with the richest diversity when it comes to its offer. From the world-famous coast destinations and islands, to its historical sites, busy cities, cuisine and wine, to the mountains and rural paradises - it is all worth a visit. We recommend opening up for real collaboration with its neighboring countries that will bring up to the development of the border areas and boost the neglected tourism products they can offer like hiking, adventure sports etc.

**Macedonia** has some way to go to fulfill its capacities for adventure tourism and other alternative forms of tourism such as rural, cultural, natural etc. It needs serious investment in infrastructure and effective tools for encouraging more small and family businesses to provide tourism services. We recommend stronger engagement in marketing of the destination, and re-evaluating the profile of tourists the marketing activities are targeting. Revision of the work and regulations of the national parks and protected areas is a matter of great urgency, as these are one of the greatest assets of the adventure tourism of the country. Up to date attractions and activities are lacking even in the most visited destinations in the country.

**Kosovo** is an exotic destination, as most of the broader audience have never heard of it, or have no idea what could be the highlight of the region. Similar to all land-locked Balkan countries, its main assets are the adventure and culture tourism potential. It has developed a variety of accommodation and food services and in the towns and villages where special historical and cultural features are found, they are the central part of the local offer. We'd recommend greater promotion of national level and stimulating private investments in tourism. Also, Kosovo has to work on protection and regulation on the natural areas attractive for tourism, as over-development and an increased human presence may damage the value of these places.

**Serbia** has great heritage in infrastructure when it comes to tourism, but only few destinations have adapted to modern-day tourism and invested in modernization. With some aspects, like spa-tourism, winter tourism, food, rural and agro tourism, Serbia could compete with other central and eastern European countries - only if the offer is targeting the foreign clients and is brought up to date with international standards. We'd recommend more involvement of the local population in tourism services, as that is the fastest way to adapt according feedback and bring warmth in the customer relation.

**Bosnia** is improving its image with confidence. Its offer has a huge variety, from adventure sports in any season, to cultural, historical and especially recent history. We recommend better connecting, networking and cooperation with the neighboring countries as most of them have well developed tourism and this is helpful on seasonal level for raising the volume of tourists and the awareness of the new destination, but also in the long-term because of the possibility of sharing experiences and tourism development models.



**Montenegro** has a dual image when it comes to tourism: there is a very developed coastline with mass and summer season tourism, and there is the inland of the country, with some of the most beautiful places in the Balkans, so scarcely promoted and visited. The coast and especially UNESCO sites like Kotor and Perast are threatened by the unsustainable numbers of tourists, and should work more in the direction of protection of the attractions and higher targeting. The country should put the lights of their promotional campaign on all the nearby National parks and towns and villages whose great opportunity is the adventure and alternative tourism.

**Albania** is becoming recognized on the international travel market for its mountains and inland rather than for its aspiring coastline. The locals in remote areas are hardworking and keen on business in tourism. However, some of the challenges they face are related to the national tourism policies. Therefore, investment in infrastructure, language courses, organizations for joint promotion and other might be the fast boost for development of the neglected and remote areas.

**Some of the underexploited potentials that we recommend future development on and possible further activities to be focused on are:**

- Supporting family businesses in tourism, especially in rural areas and places that struggle with high levels of unemployment among youth and women.
- Raising awareness of the importance of ecology and eco-sustainability in pace with the development of tourism
- Encouraging local entrepreneurs for opening side businesses with complementary offers in under-populated places.
- Exploring the potential for cross-border connecting and cross border itineraries and business networking
- Promoting opportunities for unified approach of Balkan countries to distant markets instead of the popular “competitors” approach.
- Most important of all is the education of the population – local people who may participate in creating the offer are not currently confident with inventions mainly because they are the opposite type of traveler than the tourists they are about to offer to. This gap can only be overcome with non-formal education and showing positive experiences first-hand.

Tourism, food, energy and financial markets are vital areas which require a higher degree of association between the countries of the region, in order to compete in the European and global marketplace. The formation of a joint stock exchange and the integrated promotion of regional tourism and food brands would have direct added value for the individual economies.

With respect to the tourism in the region, the whole is greater than the sum of the parts: Although relatively small in area and population, individual countries provide spectacular experiences on their own. Promoting the region, beyond the country-specific promotional activities that are typically undertaken by tourism programmes, further enhances the attractiveness of Balkan countries for tourists all over the world. Such regional integration broadens and deepens the economic development impact of individual countries and associated communities and revives cross-border relationships that suffered or were severed following the breakup of the former Yugoslavia.





## About Balkania

BALKANIA is an association for Balkan Alternative Tourism, registered in Macedonia as a non-profit NGO active in tourism and development projects. Our mission is to establish good publicity of the Balkan countries, identify, support and promote the cultural, rural and natural tourism of the member states through joint actions and coordinated partnerships and promote the entire Balkan region as a tourist destination. Our vision is positive image of the Balkan region and good publicity in the eyes of the world, strong and sustainable tourism sector and joint act of the Balkan countries on the global travel market. The name of the association BALKANIA, was chosen to sound like a name of an imaginary land on the territory that naturally conjoins 12 countries so distinct, yet sharing exceptional natural, historical, cultural and anthropological heritage of the whole geographic region represented by the hospitality of their population.

BALKANIA initiates and supports many tourism activities on local level. One of primary goals is to develop a structure standing for alternative tourism. We identified the macro sectors of our interest as: *natural, rural tourism, cultural tourism*. The efforts of the association are aimed at networking between sectors and countries on Balkan as well as on European level. The head office of BALKANIA is in Skopje – Macedonia.

[www.balkania-association.com](http://www.balkania-association.com)

## About The Balkan Forum

The Balkan Forum is a regional, cross-sectoral platform that aims to create a new vision for the Balkans through sustainable cross-border dialogue on economic development, democratic values and the rule of law.

Our positive vision is built on the common values of hospitality, solidarity, and generosity. We commit to celebrating ethnic, religious, and cultural diversity, aiming to regenerate interaction and catalyze stronger relationships among the Balkan countries; and to create a stable platform of regular communication and cooperation.

Our geographic focus is Albania, Bosnia and Herzegovina, Croatia, Greece, Kosovo, Macedonia, Montenegro and Serbia.

The following four broad thematic areas, which have been identified as having a special dynamic in the Balkan region; thus, presenting great opportunities for cooperation and joint development - form the framework of The Balkan Forum initiative: (1) Education, (2) Energy and Environment, (3) Tourism and Infrastructure Development, (4) Human Capital and Labor Market.

[www.thebalkanforum.org](http://www.thebalkanforum.org)