

Planning for sustainable tourism development in South-Eastern Europe

Expert Group Meeting on Sustainable Tourism

United Nations Secretariat, New York , 29-30 October 2013

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Our Goal

We promote international cooperation for sustainable development and international education work.

As a 100% federally owned, public-benefit enterprise, we support the German Government in achieving its objectives in the field of international cooperation for sustainable development.

GlZ is not a donor – this is the Federal Government of Germany – while GlZ is its main implementing body.

On behalf of

BMZ



Federal Ministry
for Economic Cooperation
and Development



Federal Ministry for the
Environment, Nature Conservation
and Nuclear Safety





Our Global Presence



GIZ operates in more than **130 countries** worldwide.

We employ close to **17,000 staff** members across the globe – some 70% of whom are employed locally as national personnel



So what are we doing in Sustainable Tourism?

- Share of **global ODA** spent on **tourism** programs and projects: **approx. 0.1 %**
-
- German annual overall ODA Budget: €10 Bn., of that BMZ: €6 Bn.
 - **GIZ Total Budget 2012: €2.1 Bn.**
 - German TA / FA budgets for tourism relevant measures:
 - **GIZ approx. €8. Mn.** spread annually accross ca. 50 projects
 - **KfW: approx. €160 Mn.** spread accross 9 projects over 10 years



Towards a happier Turkey at the 100th anniversary
of the foundation of our republic...



2. Analysis @Montenegro



1. Lessons Learned @Turkey

3. Co-operative/ Destination Approach @Danube River



5. Product Development @Western Balkans

4. (Human) Capacity Development @Bulgaria

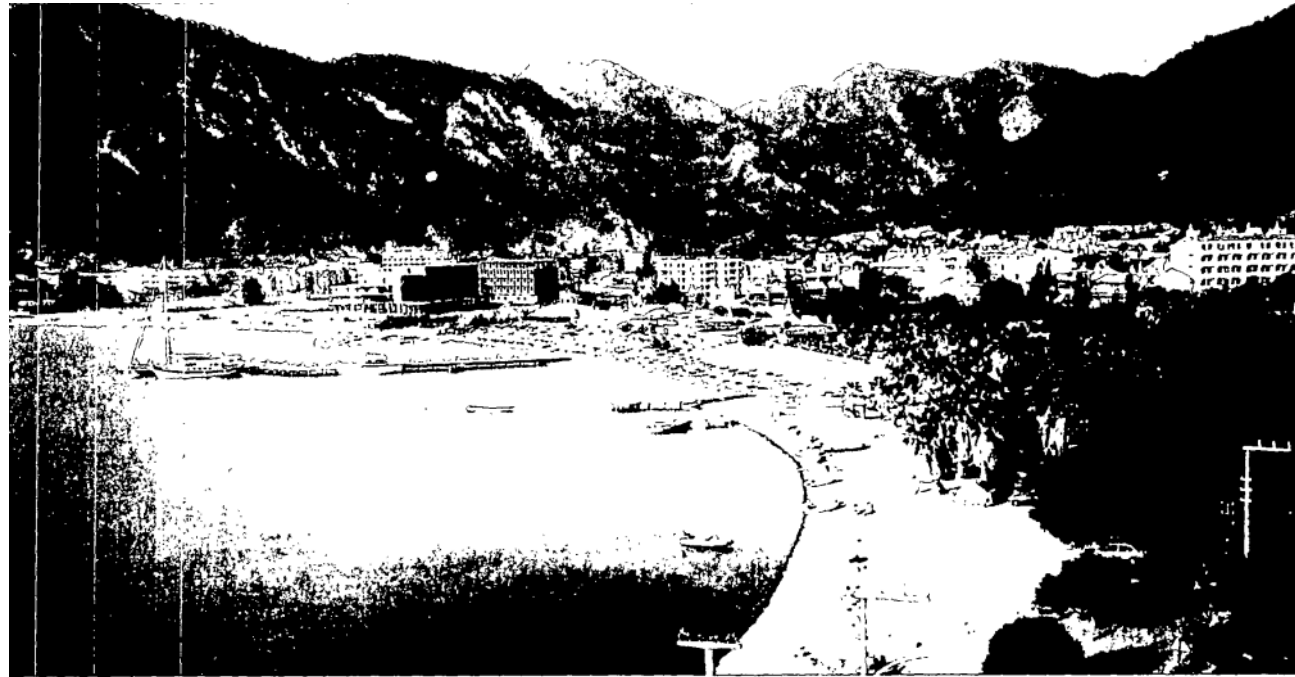




1. Lessons Learned: An Example from Turkey

Dalyan Bay, late 1980s: An Industry disgraced, i.a. followed by
„the BMZ Shutdown on Tourism Development“

Int. Arrivals to Turkey
in 1987: 3 Mn.



Ferienanlagen in der Bucht von Marmaris: Eine Art Goldgräberstimmung macht sich breit

Der Spiegel, August 1987:
„Deflowering Anatolia“ →

Türkei-Tourismus: „Anatolien entjungfern“

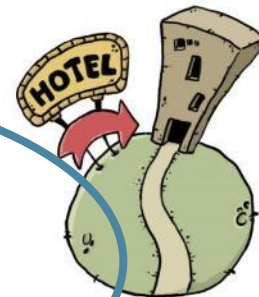
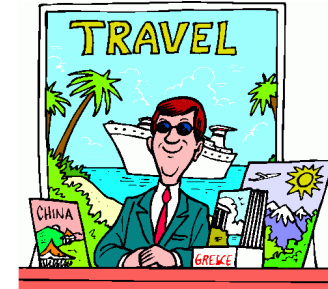
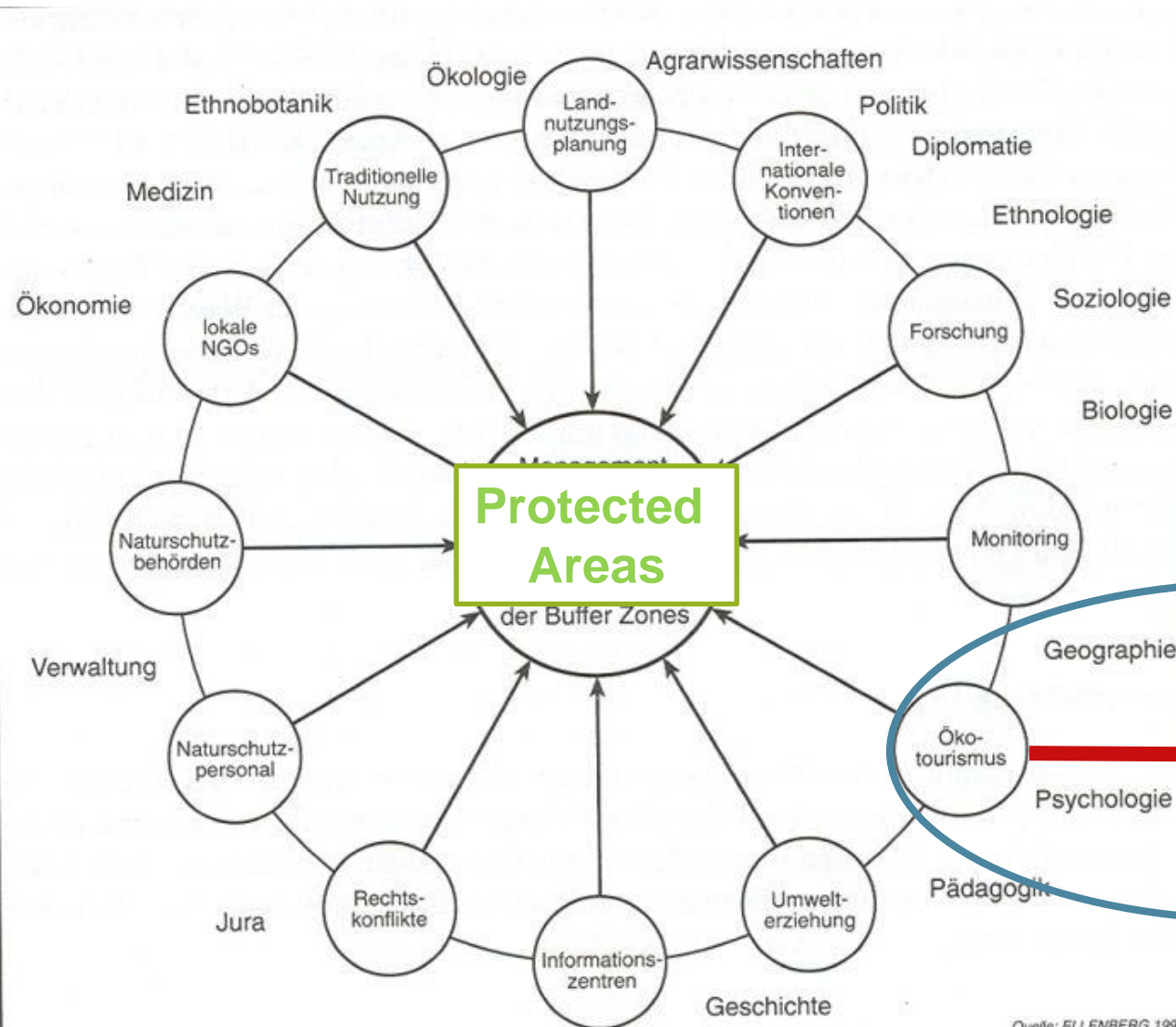
Die letzte, bislang unberührte Küste des nördlichen Mittelmeeres ist jetzt dran: Der Massentourismus erobert die Türkei. Die Regierung behauptet, aus den

Fehlern der Spanier gelernt zu haben. Aufgelockerte höchstens viergeschossige Bauten sollen entstehen. Die Umweltschützer formieren sich zum Widerstand



1. Lessons Learned...

After Rio: The age of Ecotourism - GTZ and DED in the 1990s...



→ ?!



1. Lessons Learned...

2003: BMZ commissions „Sector Project“ ***Sustainable Development Through Tourism (2004-)***

Tasks:

- 1. Advise BMZ on Sustainable Tourism Policy**
- 2. Knowledge Management and Innovation**
- 3. Advise GIZ programs worldwide, implement pilot measures**





1. Lessons Learned...

A Hotel in Turkey today: Tui Robinson Club, Belek

Int. Arrivals to Turkey in 2013: 34 Mn.

- 881 Beds
- 25.000 Guests in 2010 (62,1% occupancy)
- 90% German speaking source market
- 95% All-inclusive travellers
- 372 Staff members, of those:
 - 347 (93%) local, 26 (7%) from Germany
 - 57% with vocational training
 - 75% male / 25% female
 - 44% seasonal contracts
 - 45% employed for at least 5 years
 - Average pay: €524
 - Turkey's minimum wage (2009): €256
- FnB Procurement:
 - Foreign imports: 23%
 - Locally produced (Belek/Antalya): 12%
 - From other regions in Turkey: 65%





2. Analysis:

Montenegro Tourism Impact Forecasting Tool

Approach

- Analysis of the economic impact of **existing and future tourism** hotels
- Forecasting the economic impact of **development alternatives**
- Cost-benefit and sustainability check of different tourism development options

Goals

- Provide the Ministry of Tourism with the basis to forecast impacts of tourism development (on basis of previously written Masterplan)
- Propose a monitoring concept
- Develop a forecasting software

Montenegro Tourism Forecasting Tool - Accommodation

Type of Accommodation:	<input checked="" type="radio"/> Hotel	<input type="radio"/> Privat Accommodation & Apartment	
Number of Beds:	<input type="text" value="100"/>		
Category:	<input checked="" type="radio"/> 1/2 Stars	<input type="radio"/> 3 Stars <input type="radio"/> 4/5 Stars	
Location:	<input checked="" type="radio"/> Coastal Region	<input type="radio"/> Central & Mountain Region	
Average Occupancy Rate:	<input type="text" value="55%"/>		
Number of Jobs:	<input type="text" value="18"/> direct	<input type="text" value="32"/> direct & indirect ^{II}	
Salaries of Direct Jobs:	per year	per month	per empl. & month
Amount of Gross Salaries:	58.320 €	4.860 €	270 €
Amount of Net Salaries:	44.712 €	3.726 €	207 €
Distribution of Net Salaries in Total per Year:	Coastal Region: 41.135 €	Central & Mountain Region: 2.236 €	Foreign Countries: 1.341 €
Distribution in %:	92%	5%	3%

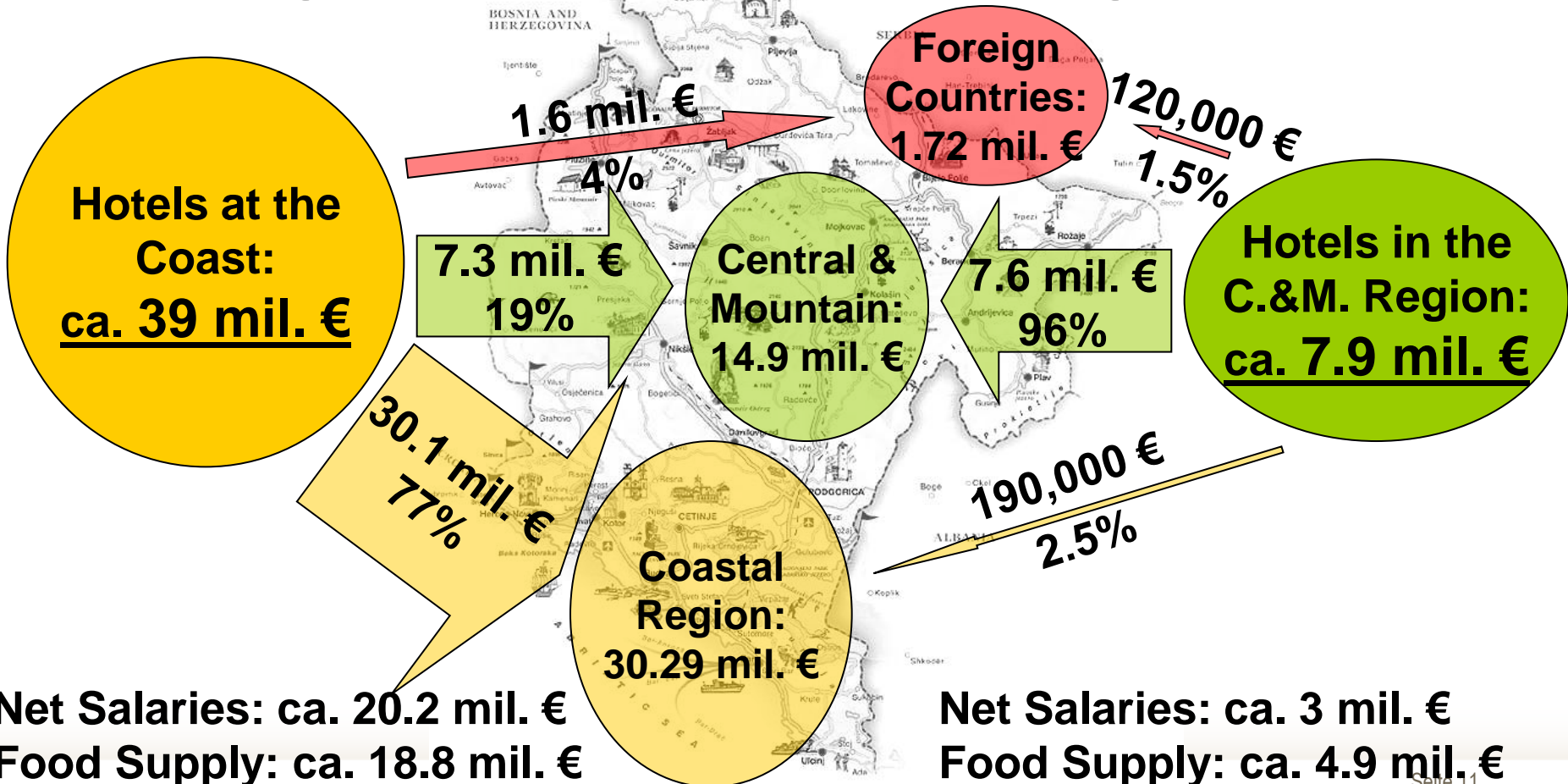
Sustainability Check

Size of Property:	total: <input type="text" value="2.300 m<sup>2</sup>"/>	per bed: <input type="text" value="23 m<sup>2</sup>"/>	
Operational Inputs in Total per Year:			
	Costs	Quantity	CO ₂ (CDE) ⁺
Waste:	<input type="text" value="1.800 €"/>	<input type="text" value="no data available"/>	<input type="text" value="no data available"/>
Water:	<input type="text" value="4.500 €"/>	<input type="text" value="2.600 m<sup>3</sup>"/>	<input type="text" value="no data available"/>
Sewage:	<input type="text" value="2.000 €"/>	<input type="text" value="no data available"/>	<input type="text" value="no data available"/>
Electricity:	<input type="text" value="12.400 €"/>	<input type="text" value="103.300 kWh"/>	<input type="text" value="66 €"/>
Gas:	<input type="text" value="no data available"/>	<input type="text" value="no data available"/>	<input type="text" value="no data available"/>
Petrol/Diesel:	<input type="text" value="3.400 €"/>	<input type="text" value="3.000 litre"/>	<input type="text" value="8,10 €"/>
Total:	<input type="text" value="24.100 €"/>		<input type="text" value="75 €"/>
Operational Inputs per Overnight :			
	Costs	Quantity	CO ₂ (CDE) ⁺
Waste:	<input type="text" value="0,09 €"/>	<input type="text" value="no data available"/>	<input type="text" value="no data available"/>
WWF Benchmark ²⁾ :		<input type="text" value="no data available"/>	
Water:	<input type="text" value="0,2 €"/>	<input type="text" value="0,1 m<sup>3</sup>"/>	<input type="text" value="no data available"/>
Ecotrans Average ²⁾ :		<input type="text" value="0,40 m<sup>3</sup>"/>	
Ecotrans Benchmark ²⁾ :		<input type="text" value="0,28 m<sup>3</sup>"/>	
WWF Benchmark ²⁾ :		<input type="text" value="0,25 m<sup>3</sup>"/>	



Salary & Food Supply Impact Map of all Hotels from Coastal Region and C.&M. Region (per year)

Coastal Region (13,600 rooms) – C.&M. Region (2,100 rooms)





3. Cooperative Destination Approach: **dsc** | danube competence center

Market development: Danube Tourism south of Hungarian border (de facto: Budapest)

Main Attractions: PAs Kopački Rit, Danube Delta (UNESCO WHS), Iron Gate, Historical Cities,....

Pilot measure (2008+): Cycling route along Danube

Establishment of regional Multi-Stakeholder-Org.:
International, National, Regional Orgs. & Local Authorities, NGO and Companies of all tourism industry sectors from 6 countries

Today's Focal Areas: Fostering Peace via Trade; generating value for the Danube basin ecosystems; Convergence and Lobbying via implementation of EU Danube Strategy





4. Human Capacity Development:

**Training Programme on Innovative and Sustainable Tourism
Development of Bulgarian Municipalities in the Danube Region**





4. Product Development:





THANK YOU
visit again

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