Planning for sustainable tourism development in South-Eastern Europe

Expert Group Meeting on Sustainable Tourism


Manuel Junck
GIZ Division Sustainable Development through Tourism
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.

GIZ is not a donor – this is the Federal Government of Germany – while GIZ 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
1. Lessons Learned @Turkey

2. Analysis @Montenegro

3. Co-operative/ Destination Approach @Danube River

4. (Human) Capacity Development @Bulgaria

5. Product Development @Western Balkans
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.
After Rio: The age of Ecotourism - GTZ and DED in the 1990s…

1. Lessons Learned…

Protected Areas

Quelle: ELLENBERG 1993
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% male
  - 44% seasonal contracts
  - 45% employed for at least 5 years
  - Average pay: €524
  - Turley’s minimum wage (2009): €256

F&B 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
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)

Hotels at the Coast: ca. 39 mil. €
Central & Mountain: 14.9 mil. €
Coastal Region: 30.29 mil. €
Foreign Countries: 1.72 mil. €
Hotels in the C.&M. Region: ca. 7.9 mil. €

Salary:
- Coastal Region: ca. 30.29 mil. €
- Central & Mountain: 14.9 mil. €
- Foreign Countries: 1.72 mil. €
- Coastal Region: 30.29 mil. €
- Foreign Countries: 1.72 mil. €
- Total Net Salaries: ca. 30.29 mil. €

Food Supply:
- Coastal Region: ca. 18.8 mil. €
- Central & Mountain: 14.9 mil. €
- Foreign Countries: 1.72 mil. €
- Coastal Region: 18.8 mil. €
- Foreign Countries: 1.72 mil. €
- Total Food Supply: ca. 18.8 mil. €
3. Cooperative Destination Approach:

**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

14 - 24 November 2013, Germany
4. Product Development: