

Tourism Development in the Western Balkans: Towards a Common Policy

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Summary

Tourism is one of the fastest-growing sectors of the global economy. Most countries are relying on it for their economic growth, including Western Balkan countries, which are investing in tourism and considering it as key-sector for their development. In the last decade, several initiatives have been undertaken by national governments, such as reviews of tourism strategic plans, tourism communication campaigns, and the creation of national tourism brands.

This contribution aims to provide a complete framework of public tourism policies in the region through the comparison of the strategies undertaken by each country. Later, countries will be then grouped by policies' characteristics and analysed according to additional indicators, such as amount of investments, policies' evaluation and implementation, and tourism numbers trends.

Preliminary findings indicate that Western Balkan countries are adopting similar tourism policies in terms of objectives, products, and investments. This fact may lead policymakers to consider the differences and unique features of their respective territories and generate competition among neighbouring countries, which are consequently obliged to contend for the same tourism market. In such a context, the conclusions and recommendations of this work point to the possibility of a common tourism policy in order to join efforts and to jointly address the region's competitiveness on a global scale.

Keywords: Balkans, Regional Policy, Tourism, Tourism Policies

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Introduction: Tourism in the Western Balkans

Over the past decades, tourism has experienced continued growth and deepening diversification to become one of the fastest growing economic sectors in the world (UNWTO, 2019). In the last twenty years, it also grew rapidly in the Balkan region, growing from less than 4 million foreigner visitors in 1999 to more than 27 in 2018 (see Table 2). Due to its position and complex history, the region has been considered “between stagnation and progress, between the past and the future, between preserving the existing state and a revolution for far too long” (Dragicevic-Sesic and Dragojevic, 2004, p. 19). In particular, the climate of insecurity caused by conflicts (most recently resulting from the dissolution of Yugoslavia between 1991 and 2001) delayed the mass tourism boom that other Mediterranean countries have enjoyed since the 1970s.

Due to the region being ‘undiscovered’ and ‘unknown,’ today the entire Balkan region is going through a golden age of tourism growth. The increasing importance of tourism in the economic structure of Balkan countries is undeniable (Cvetkoska and Barišić, 2017). Lonely Planet – the colossus of travel guides – awarded Albania the best destination of 2011. In 2016, the Bay of Kotor in Montenegro was ranked as a must-visit city, while Transylvania in Romania was ranked as the best region in the world to travel to (Butler, 2015). The region of the Julian Alps in Slovenia recently entered its rankings, winning third place in the category, ‘Best Destination of 2018’ (Lonely Planet, 2018).

Göler and Doka (2018) have divided the region into three main typologies of tourism development: (i) the ‘traditional Mediterranean holidays resorts’ of Greece and Turkey; (ii) the ‘restructured post-socialist model of tourism and leisure activities’ in Bulgaria and Romania; and (iii) the ‘well-functioning remainders of the liberal model of a socialist market economy’ in Croatia and Montenegro.

The Balkan peninsula contains countries that are at different stages of tourism development. “Indeed, besides the long-established tourist destinations along the Croatian coast, also other, more remote and rural areas are becoming hotspots for tourism” (Lehmann and Gronau, 2019, p. 46). This difference is mainly caused by their diverse economic, political, and historical backgrounds.

There are several variables along which the Balkan peninsula countries can be grouped and analysed. Already from a geophysical point of view, the region can be defined in three ways according to various natural borders: the Sava-Danube line, the Trieste-Odessa line, and the Carpathian and Balkans line (Hajdù, et al., 2007).

Figure 1. Balkan Peninsula: Geo-physical Vision



Source: Author, based on Hajdù, et al. (2007).

From a political economy point of view, the discussion is even more complex. There are at least four different groups to which Western Balkan countries belong according to organizational reports and other documents mentioned in this study.

For the purpose of this study and the mission of the journal, the analysis has been narrowed to the so-called Western Balkans and Croatia since most of the documents analysed consider it part of WB though it is already a member of the EU. Bulgaria, Greece, Romania, Slovenia, and Turkey are not part of the study¹.

Table 1. Tourism-Economies Groups according to the documents mentioned in this study

Organization	Name	Countries
United Nations World Tourism Organization (UNWTO)	Southern/Mediterranean Europe	Albania, Andorra, Bosnia and Herzegovina, Croatia, Cyprus, Greece, Israel, Italy, Malta, Montenegro, North Macedonia, Portugal, San Marino, Serbia, Slovenia, Spain, Turkey
Organization for Economic Co-operation and Development (OECD)	South-East Europe	Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia, Serbia
European Union (EU)	Western Balkans (WB)	Albania, Bosnia and Herzegovina, Croatia, ² Kosovo, Montenegro, North Macedonia, Serbia
World Travel and Tourism Council (WTTC) ³	European Union (sub-region)	Austria, Belgium, Bulgaria, Croatia, Republic of Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden
	Other Europe (sub-region)	Albania, Armenia, Azerbaijan, Belarus, Bosnia and Herzegovina, Georgia, Iceland, Moldova, Montenegro, North Macedonia, Norway, Russian Federation, Serbia, Switzerland, Turkey, Ukraine

Source: Author, based on EU (2008), (2018) OECD (2018), UNWTO (2019), and WTTC (2019).

Observing the tourism numbers of the Western Balkans countries – Albania, Bosnia and Herzegovina, Croatia, Montenegro, Kosovo, the Republic of North Macedonia, and Serbia – important gaps are already evident. Out of the seven Western Balkans countries, Croatia stands out with 16.649 million tourists in 2018 (UNWTO, 2019), followed by Albania, Montenegro, Serbia, Bosnia and Herzegovina, the Republic of North Macedonia, and Kosovo, for which updated data are not available. This is predictable due to the long and historic tourism tradition of Croatia (Beyer, et al., 2013; Orsini and Ostojić, 2018; Lehmann and Gronau, 2019) and its admission to

EU in 2013, which opened its borders to Schengen countries (OECD, 2016), among others.

In order to compare the WB countries, the table above includes a ‘Tourism Growth Index 2017/2027’ in the last row (Table 2). This index is calculated according to the data included by the World Travel and Tourism Council (WTTC) in its annual Country Reports. The average growth for this time frame is 35%, with Croatia, Montenegro, and Serbia above the average, and Albania slightly under the average, followed by the Republic of North Macedonia and Bosnia and Herzegovina. These tourism growth

Table 2. International Tourist Arrivals (in million per year)⁴

Year	ALB	BIH	HRV	KOS ⁵	MKD	MNE	SRB
1990	0.03	N/A	7.049	N/A	0.562	N/A	N/A
1999	0.039	0.089	3.443	N/A	0.181	N/A	N/A
2010	2.191	0.365	9.111	0.034	0.262	1.088	0.683
2015	3.784	0.678	12.683	0.079	0.486	1.56	1.132
2017	4.261	0.733	14.353	0.086	0.529	1.879	1.272
2018	5.340	1.053	16.649	N/A	0.707	2.007	1.711
2027 ⁶	6.25	1.018	26.033	N/A	0.754	2.978	2.095
Tourism Growth Index 2017-2027⁷	31.84%	28%	44.87%	N/A	29.84%	36.9%	39.28%

Source: Author, based on UNWTO (2000, 2016, 2017, 2019), WTTC (2017) and Kosovo Agency of Statistics (2020).

rates confirm that the entire region has become an important international tourism destination over the last two decades. The

importance of the tourism sector is also confirmed by its contribution to national GDPs (Table 3).

Table 3. Tourism sector contribution to GDP by country in 2019⁸

Country	2019 Contribution to GDP	Growth 2018-2019
Albania	21.2%	+8.5%
Bosnia and Herzegovina	9.8%	+6.9%
Croatia	25%	+4.1%
Kosovo	-	-
Montenegro	32.1%	+6.1%
North Macedonia	6.2%	+3.8%
Serbia	5.9%	+5.0%

Source: Author, based on the WTTC Country Reports: '2020 Annual Research: Key Highlights' [available at <https://wtcc.org/Research/Economic-Impact>].

Tourism assumes an essential role in boosting socio-economic growth, especially in developing countries. This industry in this region is a significant factor in the democratization process, acting as a driver for EU integration of the region (Priniotaki-Ioannis and Kapsis-Stavros, 2008). Indeed, "given the proximity to major European markets and the secular growth of tourism, it is plausible to assume that the tourism sector could be another key sector to drive the Western Balkans' catching-up process" (Benner, 2019, p. 1). Therefore, tourism policies and their implementation are central for WB countries.

Yet, tourism's strict interdependence with other sectors such as the environment, education, health, and transport, makes it even more challenging to reach the goals countries' have for the sector. For example, the tourism sector strongly relies on local human capital, which means that tourism and hospitality employees should be correctly trained for specific jobs (education sector) and that mobility should be facilitated both in terms of infrastructures and public transport (transport sector). Tourism is indeed a largely service-based sector, which ranges from travel, accommodation,

transportation, activity planning, and food services, but also resource protection, conservation, and valorisation.

Tourism is influenced by many other variables, which go far beyond a single national strategy or policy. On the one hand, natural disasters are unexpected triggers, such as the 2004 Indian Ocean tsunami which strongly impacted tourism in Thailand (Birkland, et al., 2006) or the ongoing COVID-19 pandemic, which is affecting tourism at a global scale (Gössling, et al., 2020). On the other hand, international and national economic and political crises can also impact the tourism industry, such as Thomas Cook Airlines' bankruptcy in 2019. The tourism sector is likely to have a considerable influence in the policy arena and to liaise with other policy areas to make necessary changes (Chaperon, 2017). This is why it is so important to develop resilient tourism policies that can stand up to several emergencies and unexpected changes, building a tourism system with a long-term vision and perspective.

Objectives and Methodology

This overall objective of this article is to provide a broad framework for national tourism strategies and policies in the region and to open a debate about future scenarios. The analysis will focus on public tourism policies, which are "a statement of intent" aiming to set out "desired future conditions and presenting the guiding principles for decision-making" (Chaperon, 2017, p. 427).

In the first section, a literature review of WB's national tourism strategies will create a table of the visions and priorities for each country, easing comparison among them.

The central discussion focuses on three main aspects of tourism policies, presented as a comparative analysis: (i) tourism policies' objectives and products promoted in each country; (ii) the amount of investments promoted by each government; and (iii) a contextualized reflection about policies' evaluation and implementation, related to the analysis of tourism trends in each national strategy.

The comparative analysis, supported with data and best practices, results into a concluding paragraph that opens doors for future research. An additional recommendation paragraph is included, which focuses on the possibility of introducing a common policy for the WB region.

The methodology adopted in this study is based on scientific literature and a review of official documents (listed in Table 2). These documents are compared along a number of criteria.

Tourism Policies across the Western Balkans: A Road Trip

Planning for tourism policy, or tourism policy-making, is a lengthy process that is almost always led by the national government and involves public sector agencies that play a tourism-related role and who act as advisors to the government (Chaperon, 2017).

The tourism industry is integrated into WB government structures, falling under the jurisdiction of different ministries (Metodijeski and Temelkov, 2014). Croatia is the only country with a ministry dedicated explicitly to tourism, while the others combine it with other sectors such as the environment, trade, economy, and sustainable development.

All countries have established national tourism agencies or organizations (Tables 4 and 5) except Kosovo (Demokrasi për Zhvillim, 2017). It is worth noting that a tourism agency is a "central administrative body with administrative responsibility for tourism at the highest level" (Jeffries, 2001, p. 10). At the same time, an organization or association is an "autonomous body of public, semi-public or private status, established or recognized by the state as the body with competence at the national level for the promotion – and in some cases, marketing – of inbound international tourism" (Jeffries, 2001, p. 10). Albania and North Macedonia have national agencies, while other countries have established

Table 4. Latest Tourism Policies and Promotion Campaigns by Country

Country	Latest Tourism Strategies and Policies	Latest Tourism Campaign
Albania	Strategy for the Sustainable Development of Tourism 2019-2023 (Ministry of Tourism and Environment, 2019)	Albania – Go your own way
Bosnia and Herzegovina	Strategy for the Development of Tourism in the Federation of Bosnia and Herzegovina for the period 2008 – 2018, and Republika Srpska Tourism Development Strategy 2010-2020 (OECD, 2018)	Bosnia and Herzegovina – The heart-shaped land
Croatia	Tourism Development Strategy of the Republic of Croatia until 2020 (Government of the Republic of Croatia, 2013)	Croatia – Full of life
Kosovo	<i>No national tourism strategy approved or drafted.</i>	Be in Kosovo – the young Europeans (<i>unofficial</i>)
Montenegro	Montenegro Tourism Development Strategy to 2020 (Ministry of Tourism and Environment, 2008)	Montenegro – Wild beauty
North Macedonia	National Strategy on Tourism Development 2016–2021 (Government of the Republic of Macedonia, 2016) – <i>only drafted.</i>	Macedonia Timeless
Serbia	Tourism Development Strategy of the Republic of Serbia 2016-2025 (Government of the Republic of Serbia, 2016)	Serbia - The place to be

Source: Author.

organizations, associations, or boards. The case of Kosovo deserves special attention because several tourism associations exist and operate in the territory but none of them have been established by the government (Ministry of Trade and Industry, 2014). In the following paragraphs, the tourism policies adopted and promoted by each country will be presented individually to be compared and evaluated later.

Albania

In the last few years, Albania, which has a long tradition of tourism though at a smaller scale (Porfido, 2019), has invested significant resources in this sector and represents a “laboratory for tourism development” (Göler and Doka, 2018, p. 89). As Kapllani-

Proda (2017) and Ciro (2019) have noted in their contributions, there have been several official tourism policies and strategies promoted by the governments since the collapse of communism.

Almost all tourism strategies of the Albanian government have been discontinued for different reasons. This happened in 1993, 2002, 2006, and 2007, while the 2014 strategy remained a draft. The “Strategy for the Sustainable Development of Tourism 2019 – 2023 [...] marks the first approved strategy in a series of attempts” (Ciro, 2019, p. 75). The term ‘sustainable development’ was included in the title but was not elaborated on in the body of the text. Other sectorial strategies have developed upon the term however, such as the National

Table 5. Government Bodies Responsible for Tourism Policy Development in Western Balkan Countries

Country	The government body responsible for tourism policy development	National Tourism Organization or Agency / Web page
Albania	Ministry of Tourism and Environment (former Ministry of Tourism, Culture, Youth and Sports)	National Tourism Agency - Kombëtare e Turizmit / akt.gov.al and albania.al
Bosnia and Herzegovina	SFederation of BiH - Ministry of Environment and Tourism / Republika Srpska – Ministry of Trade and Tourism	Tourism Association of Bosnia and Herzegovina - Udruženje za turizam / bhtourism.ba
Croatia	Ministry of Tourism	Croatian National Tourism Board - Hrvatska turistička zajednica / croatia.hr
Kosovo	Ministry of Trade and Industry - Department of Tourism	Kosovo Tourism Association, Kosovo Alternative Tourism Association Tourism, Association of the southern region, Association PRO IN / beinkosovo.com
Montenegro	Ministry of Sustainable Development and Tourism	National Tourism Organization of Montenegro - Nacionalna turistička organizacija Crne Gore / montenegro.travel
North Macedonia	Ministry of Economy - Department of Tourism and Hospitality	Agency for the Promotion and Support of Tourism in the Republic of North Macedonia - Агенијата за промоција и поддршка на туризмот во Република Северна Македонија / tourismmacedonia.gov.mk
Serbia	Ministry of Trade, Tourism and Telecommunications (former Ministry of Finance and Economy, Department of Tourism)	National Tourism Organization of Serbia - Туристичка организација Србије / srbija.travel

Source: Metodijeski and Temelkov (2014, p. 235), adapted and updated by the author.

Strategy for Development and Integration 2015-2020 which “set forth two strategic objectives focusing on sustainable tourism development” (Ciro, 2019, p. 75).

With the exception of this last document, a small number of initiatives have been undertaken to initiate a discussion on sustainable tourism development in Albania. Nonetheless, “current conditions for sustainable tourism in Albania are rather unfavourable” (Nientied, et al., 2018,

p. 84). Therefore, the Strategy 2019-2023 represents the first real tourism policy oriented towards sustainability. It places a fundamental importance on “orienting the development of one of the strategic priority sectors crucial to the economic development of the country” (Ciro, 2019, p. 77).

This policy document is articulated around four strategic goals to achieve through five policies groups: (i) the promotion of public

and private investments; (ii) improvement of tourism services; (iii) consolidation and development of tourism products; (iv) re-orientation of promotion towards tourism potentials; and (v) supporting the management of destinations (Ministry of Tourism and Environment, 2019, pp. 17-20). Each policy counts three sub-specific goals, which describe in more detail the actions to undertake. Besides being vaguely described, the policies span from macro-themes such as basic infrastructure implementation to concrete and specific ones, themes such as an evaluation model to classify accommodation and services.

What emerges from an assessment of these five policies is that the Albanian governments is focusing on three main typologies of tourism – marine, natural, and cultural – in terms of services, products, and promotion (e.g. creation of marine infrastructure to generate future activities). It is also worth noting that attracting strategic, private investors and developing an educational program in tourism are considered two main priorities, while no attention is paid to domestic tourism, which “makes up an important tourism contribution because of its year-round seasonality and continuous demand” (Ciro, 2019, p. 85).

Bosnia and Herzegovina

In the last 20 years, the tourism industry in Bosnia and Herzegovina (BiH) has been affected by exceptional circumstances such as war, aggression, refugees, and transition (Özlen and Poturak, 2013). Despite this, the country is not new to international tourism, starting from the organization of mega-events such as the Winter Olympic Games of Sarajevo in 1984 and maintenance of the world-renowned pilgrimage site of Medjugorje (Osmankovic, 2017).

BiH is organized in two federal entities – the Federation of BiH and the Republika Srpska, which have developed their own tourism strategies – and the Brčko District (a self-governing administrative unit). The Federation of BiH drafted the ‘Strategy for Development of Tourism in the Federation

of Bosnia and Herzegovina for the period 2008 – 2018,’ but it was never adopted. The Republika Srpska approved and adopted the ‘Republika Srpska Tourism Development Strategy 2010-2020’ (OECD, 2018).

Unfortunately, it was not possible to directly access and consult the official draft document of the Federation of BiH’s strategy. Therefore, this study includes only a review of the ‘Republika Srpska Tourism Development Strategy 2010-2020 - Стратегија Развоја Туризма Републике Српске за Период 2010–2020’ (University of Banja Luka, 2009).

This strategy is organized in two parts: the first deals with general tourism development factors, while the second focuses on the vision, strategic goals, and policies adopted. “The purpose of the Republika Srpska tourism policies is to build the competitiveness of its tourism clusters⁹” (University of Banja Luka, 2009, p. 82). The policies embraced stress investments, spatial and urban development, standard quality improvement (in terms of services, accommodation, and statistics system), and the definition of a branding/marketing strategy. Education also appears as a priority.

Unlike other countries, the Republika Srpska government means to create regional touristic clusters and to promote place-based tourism initiatives instead of coordinating at a national level. In this regard, the document states that governments should support the building of clusters and boost their competitiveness through various investments in infrastructure (University of Banja Luka, 2009). Many scholars agree about the impacts on different aspects of tourism development caused by the lack of a coordinated national tourism policy (Radovic, et al., 2013; Berjan, et al., 2014) and urge the inclusion of long-term perspectives in various strategies (Šarenac, et al., 2019).

Croatia

According to the WTTC (2020), the contribution of tourism and travel to the Croatian GDP amounts to about 25%, which

is the highest rate among WB countries studied here. The importance given to the tourism sector by the government is evident, from the extremely organized governmental structure to the detailed strategies and policies.

The Croatian Ministry of Tourism has four directorates working on international cooperation, competitiveness, tourist board systems, and legal affairs. The Croatian National Tourism Board deals with all promotional activities. Also, at the regional level, most county administrative offices have a department responsible for tourism (OECD, 2016).

The 'Tourism Development Strategy of the Republic of Croatia until 2020' reflects this accuracy in its contents, setting clear and reachable goals, efficient strategies, action plans, and including economic analyses for long-term periods. Besides, this document should "ensure Croatia's integration into a consolidated tourism policy of the European Union" (The Government of the Republic of Croatia, 2013, p. 3).

"The main aim [of the strategy] is to increase the attractiveness and competitiveness of tourism by 2020" (OECD, 2016, p. 326) through the fulfilment of set priorities: improvement of accommodation quality, development of new attractions, food offer branding, creation of a modern visitors centre, and the establishment culturally-themed routes. The ministry supports the development of tourism infrastructure with thematic grants allocated to both public and private institutions.

The strategy includes detailed descriptions of the 26 tourism policy measures, which measures progress towards the following topics: diversification and quality improvement of the tourism offer including new products such as nautical, health, cycling, adventure and sport, and cultural and business tourism; promotion of ICT initiatives from Wi-Fi access in tourism destinations to information accessibility improvement; facing seasonality through pilot projects aimed at attracting visitors all

year long; education and skills in tourism; and destination management, among others.

Croatian tourism policies are, without a doubt, the most thorough among the cases included in this review. Even though the document seems accurate, in the last couple of years some representatives of the private tourism sector have blamed the ministry for producing inefficient tourism policies. A shortage of skilled labour, inadequate tax policy, and the necessity of legal changes for work in the tourism sector are among the main issues (Kolar, 2019). Another hot topic is the government's focus on the 'sun and sea' tourism model, which has led to high seasonality with a significant impact on various infrastructures (Orsini and Ostojić, 2018).

This last point inevitably forces a reflection on the importance of monitoring policy results to guarantee their effectiveness.

Kosovo

Currently, "Kosovo does not have a comprehensive strategy on tourism, and the current law on tourism is not fully implemented" (Demokraci për Zhvillim, 2017, p. 7). Therefore, it is not possible to include it in this study.

Despite this, it is worth mentioning that Kosovo's government is working on a Tourism Strategy as part of a broader Private Sector Development Strategy. The strategy will include a series of policies aimed at boosting the hospitality sector and improving the quality of accommodation. Also, when dealing with promotion, Kosovo already "engages in a range of promotional activities, including participation in international events and fairs" (OECD, 2018, p. 614).

Montenegro

Montenegro is going through the negotiation process for EU membership. Aligning their economies and policies to EU standards represents a significant challenge

(European Commission, 2018). In this framework, tourism is a critical sector for achieving membership.

The 'Montenegro Tourism Development Strategy to 2020' (Ministry of Tourism and Environment, 2008) is the latest strategy of the national government related to tourism, which was preceded by a 'Masterplan for Tourism in 2001' and an action plan in 2008 (OECD, 2018). The latest strategy aims at positioning Montenegro as a "high-quality destination and defines goals such as upgrading accommodation infrastructure, raising service quality, diversifying the offer [...] and linking tourism with other industries" (Benner, 2019, p. 2).

The document is organized in three main sections: an analysis of the present situation, the strategic orientation for Montenegrin tourism development (including vision, objectives, and policies), and the expected outcomes.

The strategy counts five objectives with 20 detailed policies to achieve them: (i) 'quality instead of quantity' improvement of touristic infrastructures; (ii) the creation of a unique, integral tourism destination; (iii) diversification of the tourism offer to face seasonality; (iv) strengthening the institutional and legal framework; and (v) local communities' involvement in tourism activities.

Among all detailed policies, two are worth mentioning because of their novelty: the establishment of a "clean image of Montenegro" (1.7); and all policies under the fifth objective of involving local communities (Ministry of Tourism and Environment, 2019, p. 43). The first links the touristic image of the country to the critical waste management situation, aimed at its improvement through an awareness campaign and the creation of new infrastructures. The second aims to encourage entrepreneurship in domestic tourism, raising awareness about the tourism sector's importance for the country.

As in the case of BiH and Albania, the national government sustains the establishment

of six touristic clusters, whose "scenic and cultural traits differ from each other" (Ministry of Tourism and Environment, 2008, p. 66). These clusters are connected through tourism corridors in order to create a unique experience, ranging from the coastal areas to the hinterland.

North Macedonia

The North Macedonian government drafted the 'National Strategy on Tourism Development 2016–2021' in 2016 (Government of the Republic of Macedonia, 2016), but it was never officially adopted. Therefore, the "country has no valid long-term strategy for tourism development" (UNECE, 2019, p. 21).

Previously the Former Yugoslav Republic of Macedonia implemented a tourism strategy for the period 2009–2013, but there is no evidence of its evaluation, or whether any relevant insights from that strategy informed the current one (OECD, 2018). The 2009–2013 strategy envisioned that Macedonia would become a "famous travel and tourism destination in Europe based on cultural and natural heritage" (Petrevska, 2012, p. 118).

Although it remains a draft, the latest strategy (2016–2021) forecasts significant improvement, with a focus on urban, cultural, and lake tourism (Petrevska and Collins-Kreiner, 2019). It also envisages investments in 'special tourist development zones' (UNECE, 2019). The document drafted by Kohl and Partner consulting company counts eight key objectives, focused mainly on improving the awareness and attractiveness of Macedonia as an international tourism destination (Kohl and Partner, 2016).

In the meanwhile, the government is financing programs for tourism development managed by the Ministry of Economy and the National Agency for the Promotion and Support of Tourism (UNECE, 2019).

Serbia

The Republic of Serbia is also going through the negotiation process for EU membership. Like Montenegro, tourism represents a priority sector for the national government within the integration process. Despite its importance, tourism growth was been slightly under the regional average until 2017 (Gajić and Vujko, 2017); new data offer more promising figures (see Table 2).

Since the first strategic document related to tourism – the ‘Tourism Strategy of 2006’, the Serbian government has adopted a cross-sectorial approach, integrating tourism with other sectors such as the environment. Natural resources and protected areas are considered fundamental for tourism as well as rural development. Indeed, the 2006 tourism strategy addresses “social issues in rural Serbia such as unemployment, depopulation and the disempowerment of women and the youth” (Orlović-Lovren, et al., 2013, p. 50).

This first document set the basis for the following strategy, ‘The Serbian Tourism Strategy 2016-25’, adopted in November 2016 (Government of the Republic of Serbia, 2016). This strategy is an excellent example of collaborative preparation, with inputs from tourism experts, relevant associations and organizations, local authorities, individuals from academia, and business and NGO representatives (OECD, 2018).

The strategic document 2016-2025 opens with a thorough review of the current situation, including a comparison with tourism-competitive countries. It then defines the vision and sets objectives for 2025, which include the sustainable development of tourism, strengthening the sector’s competitiveness, increasing the sector’s employment trends and GDP contribution, and the improvement of Serbia’s overall image in the region, Europe, and globally (Government of the Republic of Serbia, 2016). It is worth mentioning the use of the term of ‘grey economy’¹⁰ in the objectives (which the strategy aims to reduce), as it is considered one of the main

obstacles for economic development in the Western Balkans (Krešić, et al., 2017).

Finally, an action plan outlines priority measures aligned with the strategy’s objectives (OECD, 2018). The 21 measures proposed are grouped into six typologies: (i) the coordination of tourism activities among actors; (ii) improvement of the statistical monitoring system; (iii) improvement of tourism infrastructure; (iv) introduction of new ICT technology; (v) support activities dedicated to local stakeholders for funding applications; and (vi) improvement of destination management. As in Montenegro, the local communities’ involvement is relevant for the government, as it can provide support for funding applications.

In the final section, the strategy focuses on the importance of indirect and direct measures for supporting tourism development. The indirect measures include lowering the VAT rate for tourism businesses and promoting incentive programs for local agencies and tour operators, among others. Direct financial instruments include grants, loans, venture capital funds, and public-private partnership projects applied directly or through financial intermediaries.

Discussion: A Comparative Analysis of Tourism Policies

Based on the review of each country’s strategy, it is evident that WB national governments and policymakers have certainly recognized the importance of the tourism sector. Five out of seven countries have structured tourism strategies, some of which also include long-term perspectives and detailed policies. North Macedonia’s Ministry of Economy is currently “updating the draft for another round of consultations with other ministries” (UNECE, 2019, p. 22), while Kosovo is working on the first draft of a tourism strategy (OECD, 2018).

In the following paragraphs, national policies are compared in order to have a clearer picture of the region’s policies, objectives, and products (4.1), investments and funds (4.2), and evaluation and

implementation programmes, as well as their impact (4.3).

Tourism Policies' Objectives and Product

Table 6 summarizes the tourism policy objectives and the tourism products

described in each country's tourism strategies. Investment attraction, promotion, quality standards improvement, and destination management represent the lowest common denominators of all strategies.

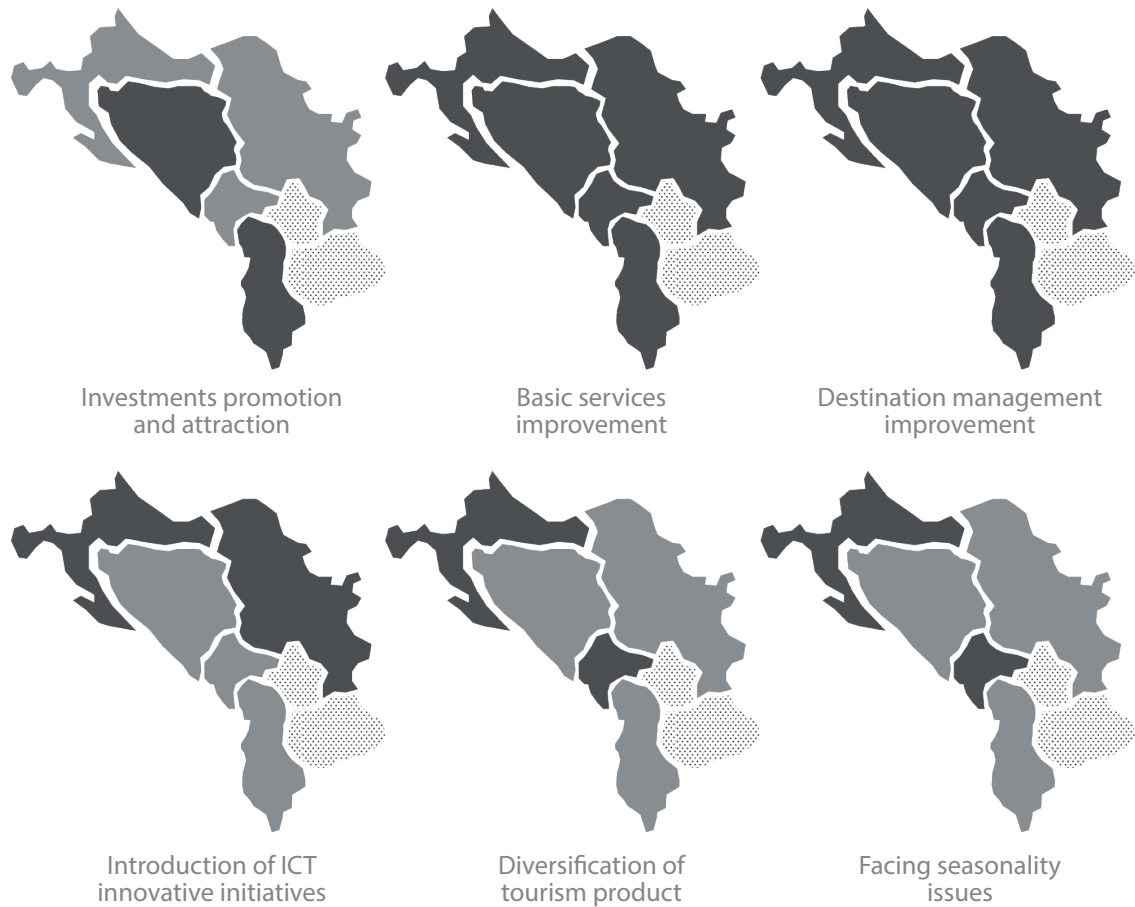
Table 6. Policies highlights and tourism products by country

Country	Tourism Policies – Objectives' Highlights	Marine, natural, and cultural tourism.
Albania	Investment promotion, tourism services improvement, consolidation and development of tourism products, promotion, and destination management support.	National Tourism Agency - Kombëtare e Turizmit / akt. gov.al and albania.al
Bosnia and Herzegovina	Investment attraction, spatial and urban development, standard quality improvement, and branding/marketing strategy definition.	Rural, mountain, transit, religious, health, and urban tourism.
Croatia	Diversification of tourism products, ICT initiatives promotion, seasonality, education and skills in tourism improvement, and destination management.	Sun and sand, nautical, health, cycling, adventure and sport, cultural and business tourism.
Kosovo	-	-
Montenegro	Touristic infrastructure improvement, creation of a unique tourism destination, diversification of tourism offers, seasonality, institutional and legal framework strengthening, and local community involvement.	Nautical, mountain, golf, congress and other events, wellness, camping, cultural, natural parks and UNESCO sites, and agritourism.
North Macedonia	-	-
Serbia	Ministry of Trade, Tourism and Telecommunications (former Ministry of Finance and Economy, Department of Tourism)	Business events, mountain and lakes, urban, health, nautical, touring, and rural and transit tourism.

Source: Author.

Croatian, Montenegrin, and Serbian strategies stand out for their completeness, which is also reflected in the types of objectives set. The introduction of innovative ICT initiatives, diversification of tourism products, and the topic of seasonality represents an essential element for evaluation. While all countries are facing obstacles such as tourism infrastructure

improvement, weak legal and legislative frameworks, and non-existent monitoring activities, Croatia, Montenegro, and Serbia introduced themes that represent challenges for the most developed tourism destinations worldwide.

Figure 2. Countries grouped by Typologies of Tourism Policies

Source: Author, based on Table 6.

Tourism products, nature, and cultural heritage represent the leading resources for the Western Balkans. Albania and Croatia bet on a more general natural and cultural tourism, while Montenegro has decided to target specific groups by focussing on nautical, golf, congress, and wellness tourism. Bosnia and Herzegovina and Serbia invest more in rural, mountain, and lake tourism. Nevertheless, considering the common starting points in terms of natural and cultural heritage, the risk of competing around the same tourism products is high. Coordination is needed to avoid this from happening and to improve the states' cooperation.

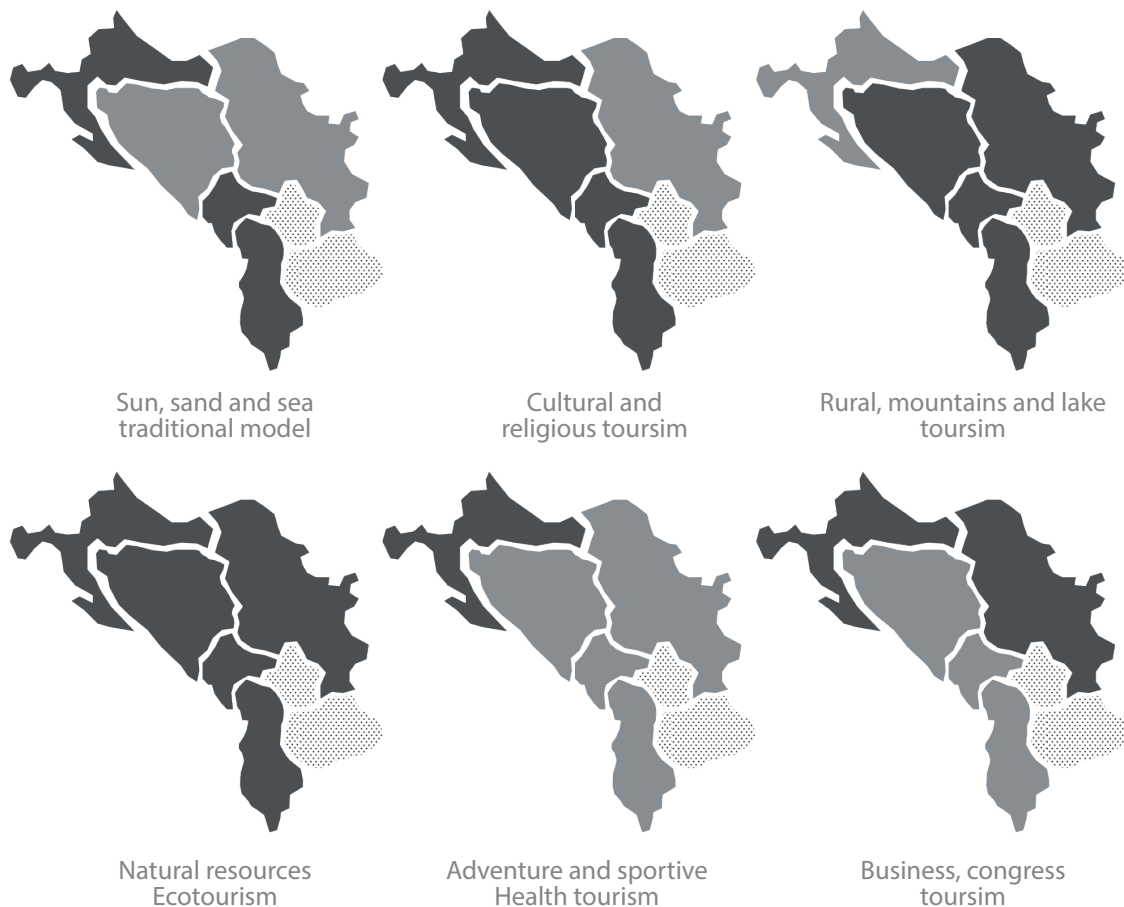
Investments and Funds

Besides the typology of tourism policies and products included in each strategy, it is also important to reflect on their concrete

impact on national economies in terms of investments promoted and funds allocated, policy evaluation and implementation, and the possible impact on tourism numbers.

The amount of funds allocated to tourism investments in each country is a determining factor in the future development of tourism industry. Albania has included a specific "Tourism Development Program" in the National Strategy (Ministry of Tourism and Environment, 2019, p. 22), which directly allocates almost 1.5 billion EUR of public funds over four years to tourism development initiatives. Attracting private investments is mentioned as Policy Goal 1 and Economic Output 3, for a total of around 2.5 billion EUR. The average investment per year is circa 1 billion EUR.

Croatia's tourism vision allocates 7 billion EUR in investments during the period 2013-

Figure 3. Countries grouped by Tourism Products

Source: Author.

2020, which means an average investment of 1 billion per year (Government of the Republic of Croatia, 2013, p. 31). The document has detailed the typologies of investments, but it does not explicitly refer to the origin of the funds, or mention if they are to come from public or private sources. The national government has also developed a national catalogue of investment projects, which identifies and presents public projects for which the Republic of Croatia seeks investors (e.g. construction of new hotels and resorts; investing in newly realized tourist attractions such as golf clubs, conference centres, etc.; and investing in other tourist infrastructure).

In the case of Montenegro's strategy, there is no direct reference to the total investments planned, public nor private. However, Section 3.6 – "Expanding bedding capabilities" – includes a detailed table of

greenfield investments to be started in 2008 and finished in 2020 (12 years), for a total sum of 10.5 billion EUR (Ministry of Tourism and Environment, 2008, p. 87). This means an average private investment of 0.9 billion/year.

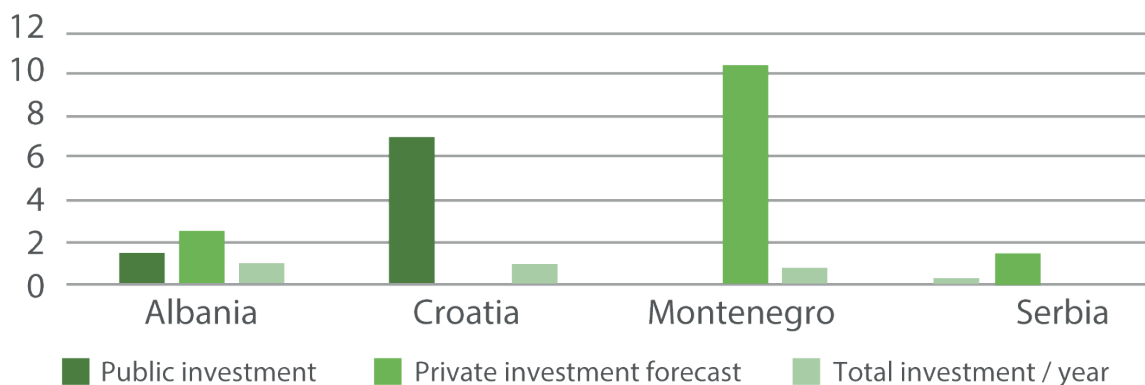
Serbia's tourism strategy 2016-2025 allocates a total of around 2 billion USD (in euros 1.85), 20% of which are invested by the public sector. This amount has been estimated by the use of the Growth Model, which means that the economic effects of tourism (or whatever other activity) are based on the country's economic growth projections. In the case of Serbia, the tourism numbers used as a reference are those published by the WTTC. The investment per year amounts to 0.2 billion USD (for a ten-year strategy).

Data for Bosnia and Herzegovina, Kosovo, and North Macedonia are not available. As

shown in Figure 4, no great differences exist among the other Western Balkan countries. Although resource origins might be split differently between private and public funds, Albania, Croatia, and Montenegro allocated an average of 1 billion EUR/year to their respective tourism industries.

The investments of Serbia, however, are considerably under average (estimated around 0.2 billion USD/year). This last figure seems contradictory to the number of policies promoted and the solid structure of the Serbian strategic plan itself and may need to be updated in light of new numbers.

Figure 4. National Governments' Investment Plans in the Tourism Sector, (in billions EUR)



Source: Author, based on Ministry of Tourism and Environment – Republic of Albania (2019), Government of the Republic of Croatia (2013), Ministry of Tourism and Environment – Republic of Montenegro (2008), and Government of the Republic of Serbia (2016).

Evaluation, Implementation and Impact of Policies

Policy evaluation and implementation represents a sore point for all WB tourism strategies. This reflection already emerges from several evaluation reports and articles (OECD, 2018; UNECE, 2019; Kolar, 2019; Ciro, 2019), which stress the need for monitoring and implementation activities. If not adequately evaluated during and after their action periods, tourism policies and strategies are almost useless.

BiH, Croatia, and Montenegro's strategies end this year (2020) and none have been implemented or evaluated to date. The Croatian strategy included a detailed calendar of implementation by year, but no evaluation reports have been issued to confirm its accomplishment. Montenegro only mentioned monitoring as a priority of the strategic objective concerning the creation of an appropriate institutional and legislative framework.

Albania and Serbia's strategies, which end in 2023 and 2025 respectively, seem to

represent an important change of direction in the evaluation and implementation of tourism policies.

The Albanian government set a range of indicators for each specific goal. The "Performance Evaluation Matrix" provides precise figures on a yearly base, categorized as general economic outputs and policies objectives (Ministry of Tourism and Environment, 2019, pp. 26-28). The evaluation is entrusted to a focus group on Tourism and Culture Development, led by the Deputy Minister and including the regions' responsible prefectures and a number of observer members belonging to local, national, and international authorities, universities, and civil society associations. Its recent approval in 2019 makes it impossible to discuss its evaluation further, since no evaluations have been done of previous strategic documents.

Serbia represents a best practice in the region in terms of evaluation and implementation. The strategy 2016-2025 includes a section dedicated to the evaluation and implementation of the

previous strategy (2006-2015), providing a detailed description of the results accomplished, although they represent “only a part of the expected” ones (Government of the Republic of Croatia, 2013, p. 52). Among the ‘unaccomplished’ issues, the implementation of international quality standards, the share of the grey economy, and monitoring of tourism sector performance are mentioned. According to the new strategy, the Tourism Ministry is responsible for the evaluation and implementation of tourism policies, while has assigned to the NTOS – National

Tourism Organization of Serbia the task of implementing annual plans concerning promotional activities.

Finally, measuring the impact of tourism policies on tourist numbers is difficult, especially since the time periods of each country policy are out of sync. Table 5 represents an attempt to relate policy effectiveness through a comparison of tourist numbers by year and forecasts included in the strategies, when mentioned. The table includes only the countries whose strategies provided specific forecasts.

Table 7. Comparison between Real Tourist Numbers and Forecasts (R= real arrivals number; F = forecasted arrivals)

Country	2018 R	2019 F	2019 R	2020 F
Albania		6,401,160 international arrivals	6,406,038 international arrivals	
Croatia	106 million overnight stays			86 million overnight stays
Serbia			3,689,983 international arrivals	3,689,000 international arrivals

Source: Albania (Ministry of Tourism and Environment, 2019, p. 28; INSTAT Albania, 2020), Croatia (Government of the Republic of Croatia, 2013, p. 62; Ministry of Tourism Republic of Croatia, 2019), Serbia (Government of the Republic of Serbia, 2016, p. 49; Републички завод за статистику, 2020).

Albania accomplished its 2019 objectives, although it is risky to attribute this to the promotion of its tourism policies since they were approved in the same year. (The effectiveness of policies can only be evaluated after a certain amount of time has passed since their approval (Dutch Ministry of Foreign Affairs, 2009)). Croatia has forecasted 86 million overnights stays for 2020, though it already exceeded one hundred million stays in 2018. Indeed, this fact results from the great tourism promotion campaign that the Croatian governments started after the official entrance in the EU area, the arrival of low cost airlines such as Ryanair, Vueling and EasyJet that connected the country to the main European capitals, and the indirect promotion related to events such, for example, the famous TV series

‘Game of Thrones’ shooting that generated a strong and solid niche of tourism (Tkalec, et al., 2017). In the case of Serbia, the 2020 target of 3.69 million arrivals was reached in 2019.

If one judges a policy’s effectiveness based on the accomplishment of targets set by a policy itself, it is possible to say Albania, Croatia, and Serbia met their objectives and that the policies promoted paid off. But this final reflection also emphasizes the difficulties in analysing the effectiveness of tourism policies, especially in the short-term. The tourism industry is affected by many variables that go far beyond each country borders, such as global market trends, international tourism companies’ investment strategies, and unpredictable

natural disasters or economic crisis (such as the ongoing COVID-19 pandemic).

Conclusions: Prioritizing the Tourism Sector in WB countries: Challenges and Opportunities

In conclusion, it is clear that all WB countries are prioritizing tourism in their political and economic agendas. The comparison of the tourism policies promoted, the tourism products identified, the amount of investments in the sector, and the policy results illustrates that the region is going in the same direction, both in positive and negative ways.

Indeed, what emerges from the discussion section is that, although WB countries are not synchronized in the tourism destination development phase, the objectives, challenges, and opportunities of the sector are similar for each of them. In addition, the strong and weak aspects of national tourism policies are common to all WB countries.

When dealing with policy objectives, WB countries can be grouped into two main categories: those creating basic services for tourism (Albania, BiH, North Macedonia, and Serbia), and those addressing issues of more advanced tourism destinations (Croatia and Montenegro). This difference is not reflected however in the typology of tourism products promoted. Indeed, there is a first obvious distinction between the countries facing the sea and promoting the *sun, sea and sand model*, and the ones inland that are focusing on mountain and adventure tourism. But there are also other categories of tourism products that can impact these assets, such as business event tourism (a common target of Croatia, Montenegro, and Serbia) and religious tourism (promoted in the coastal countries). Finally, it is clear that the promotion of natural resources represents a priority for all WB countries.

The diversity of the tourism products promoted by each country and the similarities in their objectives represent the strongest aspects of WB tourism policies. Indeed, the diversity of tourism products highlights the

great attention paid to the valorisation of each country's specific resources, and the similar objectives stress the fact that the starting points and opportunities are the same for all WB countries. Indeed, sharing common objectives and being aware of their territorial specificity means that the sector can be more efficient, gaps at national level can be overcome, and countries can learn from each other's experiences.

Yet, the comparative analysis reveals that the amount of tourism investment across WB countries is small, averaging 1 billion EUR a year (in Albania, Croatia, Montenegro and Serbia). Another weakness is the poor attention dedicated to tourism policies' evaluation and implementation. In most cases, the evaluation is not even mentioned among the activities of the strategies (BiH, North Macedonia) or it is cited but not implemented (Croatia and Montenegro). The great attention paid to this theme in the most recent strategies incite hope, such as the case of the Albanian and Serbian strategies, which include detailed policy evaluation systems.

These two last elements are definitely the weakest of the entire comparative analysis and represent the most important challenges to deal with moving forward. To prioritize tourism as an economic sector and to develop a consistent and sustainable model of development, all countries need make an effort to increase investments and constantly monitor their effect.

In addition, many fundamental aspects of tourism go unaddressed in the strategies analysed. One is the huge importance given to international tourism to the detriment of the domestic. Indeed, "the Balkan countries exchange among themselves significant tourist flows which support the development of the tourism industries mainly in the neighbouring countries" (Vasileva and Preslavsky, 2017, p. 43), but domestic tourism is not treated in any national strategy, with the exception of Montenegro, which sets a specific objective dedicated to its promotion.

The second aspect is a critical and more general reflection. In the current historical period characterized by the COVID-19 pandemic, which has imposed strong limitations on travelling, the global tourism industry has proven not to be ready to face such challenges. Few countries were prepared for such dramatic events, including the WB. Indeed, none of the documents presented in this study consider the effects of natural disasters or economic crises. In addition, climate change, resilience, health issues, and political crises are completely ignored. Vulnerability and uncertainty are common risk factor of tourism worldwide. Considering them in national policies can be a good starting point to design and develop a more solid and sustainable tourism model.

Recommendations: Towards a Common Tourism Policy for the Western Balkans in times of Global Crisis

The recent events related to the COVID-19 pandemic show that the measures adopted until now by most countries worldwide are not versatile nor flexible. The tourism industry is completely blocked as a consequence of the global lockdown (Gössling, et al., 2020). This will have enormous consequences on future tourism development, in both short and long term¹¹.

Western Balkan countries, whose tourism almost fully relies on international fluxes, have been strongly affected by such an event. Six months after the beginning of the worldwide lockdown¹² and the slow lifting of restrictions, many WB countries are still on the 'black-list' for tourism, in the sense of both entering and leaving. Croatia is the only exception and opened its borders to all tourists in the beginning of July.

This reflection emphasizes the urgency of designing resilient tourism policies, which can deal with several unexpected events related to many fields including: the economy (e.g. crisis); the environment (e.g. climate change and its effect on consolidated tourism destinations); health (e.g. the above mentioned COVID-19 pandemic);

and politics (e.g. changes in political assets among countries), among others. Indeed, none of the strategies included in this study refer to any of these topics.

Therefore, each government should adopt local and national tourism policies that can respond to local, regional, and global phenomena, including natural catastrophes. The adaptability and resilience of the tourism sector can be achieved through strengthening local policies and institutions, and by building strategies and initiatives that make use of place specificities and diversity, while being complementary. This emphasises the idea of a regional policy, which does not override national efforts and initiatives, but enhances their impact and efficiency.

Consequently, a possible solution is the establishment of common tourism policies among neighbouring countries. "Common tourism strategies and actions could support the momentum for regional cooperation emerging from recent initiatives" (OECD, 2018, p. 619). Several scholars and institutions have agreed that the creation of common regional initiatives is of crucial importance (Hammer and Siegrist, 2008; Denga, et al., 2019).

Following the findings of this study, similarities among Western Balkan tourism policies are evident. The establishment of the macro-regional strategy EUSAIR – the 'EU Strategy for the Adriatic and Ionian Region' – and the Transnational Cooperation Programme 'Interreg ADRION (Adriatic Ionian)', which enhance and promote sustainable tourism initiatives in this specific regional framework, represent a first step towards the development of common goals. Indeed, the EUSAIR strategy included 'Sustainable Tourism' as its fourth pillar (and involve Albania and Croatia).

To conclude, Metodijeski and Temelkov (2014) make a step forward stating that the "next step [for WB countries] should be a joint presence on the international tourism market as well as mutual promotion" (Metodijeski and Temelkov, 2014, p. 239).

Considering the significant similarities among opportunities and challenges for tourism sector development in each WB country, the creation of a commonly functional set of tourism policies and strategic alliances may represent an opportunity for the entire region. Such initiatives will not substitute local or regional authorities, whose importance is evident, but rather integrate them within a multi-level governance structure.

Notes

1. Throughout the text, the WB countries are always mentioned in alphabetical order.
2. EU official documents have generally adopted the term 'Western Balkans' for the countries that are currently not members but are either candidates or in negotiation process to join. This means that Croatia was considered in this group until 2013, when it officially became a member.
3. Kosovo is not included in the WTTC reports, neither in the sub-region 'European Union' nor the 'Other Europe.'
4. Tourism data collection and elaboration methodologies are different for each WB country, especially concerning the definition of international tourist and visitor. Therefore, all official data should be considered with caution.
5. Data concerning Kosovo are not available in the UNWTO because it is not part of the United Nations system. Data used in this study belong to the Kosovo Agency of Statistics [available at <https://ask.rks-gov.net/en/kosovo-agency-of-statistics>] and is only available from the independence declaration of 2008 until 2017.
6. Until 2017, the WTTC Country Reports included the forecast of international visitors for each country for up to ten years. Indeed, this data has been used in this study to calculate the Tourism Growth Index from 2017 to 2027.
7. The 'Tourism Growth Index 2017/2027' is calculated on the percentage ratio between the international arrivals registered in 2017 and the 2027 forecasted by WTTC (2017), for each country.
8. Once again, for guaranteeing the same data collection and elaboration methodology, the data included in this study refers to the WTTC Country Reports. Also, in this case, data should be considered with caution. The Albanian case is illustrative. The national INSTAT office registered a percentage tourism contribution to GDP of 2.5% in 2017 and 2.8% in 2018, while the WTTC already estimated a contribution of 21.2% in 2019.
9. Translated by the author from Serbian: "Политике у туризму Смисао туристичке политике Републике Српске своди се на изградњу конкурентности њених туристичких кластера" (University of Banja Luka, 2009, p. 82).
10. For 'grey economy', the author intends that economy sector which escapes taxes payment – committing tax evasion and/or fraud - and which is difficultly monitorable by local and national governments. It is often referred as informal sector, shadow economy, underground economy, among others.
11. For more on COVID-19's implications on tourism in the Western Balkans see the article of Nientied and Shutina in this issue.
12. The 9th March 2020 is assumed as the start of the lockdown, when the Italian Government announced the beginning of restrictions in its national territory, which was followed by many other governments in the following days.

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