

Position Paper

Sustainable tourism development in the Baltic Sea region post 2020



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In an ever shrinking and integrating world, tourism has become one of the fastest growing industries worldwide and has experienced exceptional growth over the past decades. Moreover, projections of the UN World Tourism Organization forecast international tourist arrivals to reach 1.8 billion by 2030 (UNWTO Tourism Towards 2030). This poses a major challenge for the sector in many regions worldwide. From 2014 to 2016, the Baltic Sea region recorded an increase of 10.4% in arrivals and respectively 8.9% in overnight stays which amounts to a total of 88 million arrivals and 227 million overnight stays in the year 2016. With 640.000 people directly employed in tourism, the sector will remain an important driver of the economy and puts the area in strong competition with other macro-regions.¹

The steadily increasing demand for international travels raises the question how destinations align their internationalization strategies in the future to benefit from the positive effects and minimize the negative impacts of growing tourism flows. These positive and negative implications require both, sustained development at all levels and collaborative partnerships across regions and states. Hence, in the perception of visitors political borders are disappearing, regions are merging thematically and travelers are moving freely and according to their individual and increasingly demanding needs in the Baltic Sea region. In defined areas, international solutions are inevitable to help tourism grow in a way that it fully exploits the vast international potentials, and at the same time, preserves the cultural and natural assets and respects the life of local communities.

Therefore, we, the tourism stakeholders in the Baltic Sea region share the conviction that sustainable tourism development at macro-regional level needs permanent cooperation patterns, stronger political support, and stable funding opportunities after 2020 to overcome patchwork structures, address common challenges, and increase the competitiveness on international scale.

Throughout a comprehensive stakeholder consultation, three major areas have been identified and backed up by core requirements of the sector.

Tourism cooperation across national borders is crucial in order to jointly address international developments and there is a well-founded need on operational level to:

- promote a sustainable tourism development on all levels and in all its dimensions through skilled management processes;
- better control and monitor tourism flows to reduce negative impacts on nature, culture and local communities, and take active measures to protect the environment and combat climate change;
- discover smart forms of clustering SMEs, with the aim to improve collaboration and produce better business performances especially in a responsible, sustainable and international market environment;

¹ Baltic Sea Tourism Center - Tourism Market Monitor®



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- support SMEs in product development, also on transnational level, based on trends and future demands of ever more experienced international travellers;
- create knowledge on changing expectations of travellers against the background of demographic change and raise awareness on how digitalisation will further effect tourism services and travel behaviour;
- exploit synergies of maritime and land based offers in cruising and yachting tourism through an effective partnership of relevant actors on site;
- improve the touristic infrastructure in particular with regard to mobility, accessibility and connectivity in a green, integrated and interoperable way;
- develop approaches in order to improve the accessibility, visibility and the attractiveness of rural areas and smaller destinations;
- mitigate seasonal fluctuations and diminish peaks and troughs in tourism demand by promoting all year round offers and more tailored products and services;
- elaborate strategies and concepts to overcome skilled labour shortages and increase the attractiveness of the sector on the labour market.

Tourism policy should support and further extent a strong strategic framework for a sustainable tourism development in the Baltic Sea region. In particular, it will be vital to:

- raise the awareness of tourism being an important economic sector contributing significantly to GDP and employment in the region;
- strengthen Policy Area tourism of the EU Strategy for the Baltic Sea region and support the revision and implementation of the forthcoming action plan;
- exploit the potentials and synergies with other Policy Areas of the EUSBSR in a cross-sectoral approach;
- initiate flagship processes and create guiding themes, e.g. sustainable tourism, market research or capacity building to secure a more strategic and long-term development of particular areas;
- lobby the sector for the new funding period and secure a solid financing of international projects in tourism after 2020;
- support a sustained funding of strategic projects like the Baltic Sea Tourism Forum and its newly established Baltic Sea Tourism Center to promote permanent cooperation in the region;
- facilitate the implementation of political and strategic recommendations from the Baltic Sea Parliamentary Conference on sustainable tourism² or from the European Commission on coastal and maritime tourism³;
- provide incentives for the tourism sector to contribute significantly to the UN Agenda 2030 process and its Sustainable Development Goals;
- seek closer alliances with sector relevant institutions like the Baltic Sea Parliamentary Conference, the Council of the Baltic Sea States and non-EU countries like Russia, Norway or Belarus;
- encourage a regular exchange with other (EU) macro-regions and promote benchmarking on best practices and policies.

² Baltic Sea Parliamentary Conference - Working Group on Sustainable Tourism (Final Report 2017)

³ European Commission - Towards an implementation strategy for the sustainable blue growth agenda for the Baltic sea region (Final Report 2016)



Tourism funding for border transgressing projects is an imperative in order to provide the relevant actors with the necessary financial means and stimulate more actions on international level. However, adjustments to the current funding instruments are needed and the tourism sector recommends to:

- ensure that funded international tourism projects are in line with regional and national tourism strategies and better involve the responsible players;
- continue to provide Seed money and therewith facilitate the application process of fully fledged project applications under the different EU funds and programmes;
- improve the support of existing networks and prioritize funding for strategic projects that provide mid- and long-term perspectives and thus more sustainable results;
- promote a regular exchange and clustering of tourism specific projects to fully exploit synergies and avoid possible overlaps;
- prolong the project lifetime from regular three to even five or more years to facilitate the achievement of tangible results;
- set realistic and measurable success indicators for tourism projects that are both project related and shielded from external factors;
- increase flexibility in the selection of strategic partners, regions and countries in case they are relevant for the success of the project;
- simplify the administrative burden for project applicants and the general administration of EU funded projects;
- reduce the pre-financing period to a minimum or take account of advanced payments for projects and their activities;
- ensure easier involvement of SMEs during the application process and in the corresponding project activities;
- create incentives and reduce barriers in order to get more local stakeholders involved in transnational tourism projects.

Like hardly any other sector, tourism stands for cultural exchange between countries and regions and thus contributes significantly to more understanding among nations and peoples. Tourism does not stop at political borders and therefore requires international approaches in many areas to solve common challenges. At macro-regional level in the Baltic Sea region, international cooperation can bring additional benefits for tourism even beyond region-specific strategies and strong direct competition. Already running and accomplished international initiatives in tourism prove this. However, to achieve sustainable results continuous stakeholder engagement, a supportive policy framework, and smart funding opportunities are vital.

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