

ECOTOURISM – NATURALLY BULGARIA

NATIONAL ECOTOURISM STRATEGY AND ACTION PLAN FOR BULGARIA



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This document was developed using a broad participatory planning process with a wide spectrum of stakeholders at the national, regional and local levels. The list of institutions that participated in this process can be found in Appendix 2 of this publication.

All support materials developed and used for this document are available on the website www.ecotourism.bulgariatravel.org. A list of these materials can be found in Appendix 1 of this publication.

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Preface

Bulgaria has succeeded to preserve its rich cultural and nature conservation traditions throughout its long history. Bulgaria has always been part of Europe. During the last few years, it has risen to the challenge of being one of the leading countries on the old continent in the field of nature conservation and sustainable development.

Bulgaria's biggest asset is the combination of a diverse and intact natural environment with a valuable cultural and historical heritage, rich traditions and livelihood and, of course, talented and hospitable people.

With the help of the United States Agency for International Development, Bulgaria developed Europe's first National Biological Diversity Conservation Strategy. This document established an important framework for activities and investments for nature conservation in our country.

Ten years later, the continent's first National Ecotourism Strategy and Action Plan has been developed. It is a product of the collaboration between our Government and the United States Agency for International Development, the United Nations Development Program, the World Bank, the Swiss Government, and the Regional Environment Center. The Bulgarian government greatly values this support.

The natural heritage of the nation has been referred to as its "GREEN GOLD". During the last ten years biodiversity conservation policy, legislation and action have been focused on its preservation and maintenance. Our growing network of protected areas demonstrates both a national and local commitment to the maintenance of natural values and their diversity throughout the country. Ecotourism development is based on a balance between the conservation, economic and social policies of the government. This is in line with European policies and is a guarantee for the effective implementation of the sustainable development principles in Bulgaria.

Three ministries – Environment and Waters, Economy, and Agriculture and Forests – took the initiative in 2002 to create this policy document. This document was created through a nationwide review and planning process with the participation citizens, local government, businesses, parks, and non-governmental organizations interested in ecotourism development in Bulgaria. The consensus that was achieved guarantees that the identified objectives will be accomplished. It is significant fact, that the Second National Forum "Ecotourism - Naturally Bulgaria" held in January 2004, was attended by 300 representatives of more than one hundred institutions and organizations.



The successful implementation of the National Ecotourism Strategy and Action Plan depends to an exceptional degree on the initiative of local authorities, national, regional and local tourism associations, protected area and cultural site managers, NGOs, and private businesses. For its part, the Government of the Republic of Bulgaria has committed itself to implement the ecotourism strategy and the action plan. We will soon start to make additional resources available. And we will continue to rely on partnerships with all that are interested in the future of nature and culture - ecotourism in Bulgaria.

We are convinced that the first National Ecotourism Strategy and Action Plan leads the way for sustainable tourism development in Bulgaria. We are very confident that the efforts of all of us need to be directed to its identification and to offer creative ways of attracting Bulgarian and international tourists. Once they been in touch with the beauty of Bulgarian nature and cultural heritage they will exclaim "ECOTOURISM - NATURALLY BULGARIA!"



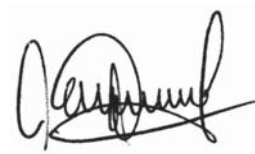
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The National Ecotourism Strategy and Action Plan was developed as a result of hard work by representatives from Bulgarian ministries, nongovernmental organizations (NGOs), businesses, academic institutions, regional and local government units, regional and local tourist associations, as well as consultants through the use of consultations, information sharing and workshops, over a one-year period.

We are particularly grateful to the three deputy ministers who supported this pioneering effort: Ms. Fatme Iliaz, Ministry of Environment and Water; Ms. Meglena Plougcheva, Ministry of Agriculture and Forests; and Mr. Dimiter Hadjinikolov, Ministry of Economy.

The National Ecotourism Strategy and Action Plan drafting team included experts from these ministries as well as professionals from the following:

- The Bulgarian Association for Alternative Tourism;
- The Bulgarian Tourism Union;
- The Pirin Tourism Forum;
- The Regional Tourism Association of Stara Planina;
- Conservation NGOs and their information centers, such as the Bulgarian Society for Protection of Birds;
- Central Balkan National Park and Strandja Nature Park;
- The Foundation for Local Government Reform; and
- The USAID Biodiversity Conservation and Economic Growth Project.

Other organizations and institutions that contributed to the workshops and the drafting process include the Ministry of Culture, Ministry of Regional Development and Public Works, Bulgarian Association of Travel Agents, Bulgarian Tourist Chamber, Bulgarian Association for Rural and Ecological Tourism, Pandion-D, Ltd., ICOMOS, Bulgarian Academy of Science, Sofia University, University for National and World Economy, Agency for Small and Medium Enterprises, Bourgas Regional Tourism Association, Mountains and People Association, Union of Parks and Landscape Experts in Bulgaria, Dobrich Regional Governor, Zlatni Piasatsi Nature Park, Rila and Pirin National Parks, Bulgarian Mountain Rescue Service, UNDP, GTZ, JICA, PHARE, and the University of Delaware/USAID-funded Firm Level Assistance Group Project.

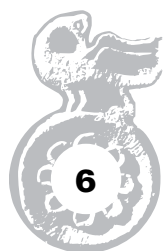
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The National Ecotourism Action Plan is the final product of the participatory process of planning 12 potential ecotourism destinations augmented with the input of six groups of tourism development experts at the national level. These two parallel processes produced the background information, which was then compiled and presented in this document with the support of two international consultants: the aforementioned Professor Donald Hawkins from The George Washington University, and John Henderson Todd, from Great Britain.



List of Acronyms

B2B	Business to Business	NBDCS	National Biological Diversity Conservation Strategy
BAAT	Bulgarian Association for Alternative Tourism	NEN	National Ecological Network
BARET	Bulgarian Association of Rural and Ecological Tourism	NETAP	National Ecotourism Action Plan
BATA	The Bulgarian Association of Travel Agents	NETS	National Ecotourism Strategy
BCEG	Biodiversity Conservation and Economic Growth Project	NETSAP	National Ecotourism Strategy and Action Plan
BGN	Bulgarian Leva	NEW Group	National Ecotourism Working Group
BTU	Bulgarian Tourist Union	NGO	Non-Governmental Organization
CBD	Convention on Biological Diversity	NNPS	National Nature Protection Service
CHCP	Cultural Heritage Conservation Plan	NTC	National Tourism Council
CIDA	Canadian International Development Agency	NTFG	National Thematic Focus Groups
CM	Cultural Monument	NWF	National Warranty Fund
CTDS	Cultural Tourism Development Strategy	OAS	Organization of American States
DMO	Destination Management Organization	PA	Protected Area
EIG	Ecotourism Initiative Group	PAF	Protected Areas Fund
EMS	Environment Management System	PAMP	Protected Area Management Plan
ETC	Environmental Technology Council	PAN Parks	Protected Areas Network Parks
EU	European Union	PHARE	EU Assistance for Economic Restructuring Program
FLGR	Foundation for Local Government Reform	REAP	Regional Ecotourism Action Plan
GEF	Global Environment Facility	REC	Regional Ecological Center
GIS	Geographical Information System	ROI	Return of Investments
GLP	Good Laboratory Processes	RTA	Regional Tourism Association
GMP	Good Manufacturing Processes	SAPARD	EU Investment pre-accession Funds in the Field of Agriculture and Forestry
GoB	Government of Bulgaria	SDC	Swiss Development Cooperation Agency
GTZ	Technical Cooperation Office (Germany)	SME	Small and Medium Enterprises
ICOMOS	International Council on Monuments and Sites	STEP	Small Tourism Enterprises Program
IHRA	International Harm Reduction Association	SWOT	Strengths, Weaknesses, Opportunities, and Threats
ILO	International Labor Organization	TEDQUAL	U.S. Magazine about quality in tourism education and training
ISPA	International Investment Program	TIC	Tourist Information Center
IT	Information Technology	TIES	The International Ecotourism Society
IUCN	International Union for Conservation of Nature (World Conservation Union)	TIN	Tourist Information Network
JICA	Japanese International Cooperation Agency	TIP	Tourist Information Point
JOBS	Job Opportunities through Business Support	TOI	Tour Operators Initiative
LAC	Limits of Acceptable Change	UN	United Nations
MOAF	Ministry of Agriculture and Forests	UNCTAD	United Nations Conference on Trade and Development
MOC	Ministry of Culture	UNDP	United Nations Development Program
MOE	Ministry of Economy	UNEP	United Nations Environmental Program
MOEW	Ministry of Environment and Waters	UNESCO	United Nations Educational, Scientific and Cultural Organization
NATURA 2000	European Ecological Network, contains territories under protection according to the requirements of the Bird and Habitats Directive	USAID	United States Agency for International Development
		WTO	World Tourism Organization
		WTTC	World Travel and Tourism Council



Introduction

The **National Ecotourism Strategy and Action Plan** for Bulgaria (NETSAP) is a reflection of the rapidly growing rate of tourism development in Bulgaria. NETSAP was developed in response to a number of local and regional initiatives associated with marketing Bulgaria's nature conservation programs, local traditions and culture as alternatives to unregulated, mass tourism. It also reflects a widespread need to facilitate local businesses that can be managed without a large influx of capital. The growth of biodiversity conservation and ecotourism is key during this period of transition to a market economy, addressing concerns for the protection of Bulgaria's environmental and cultural heritage. Biodiversity conservation, cultural heritage and ecotourism are interdependent, as each requires the other to realize their individual goals.

The NETSAP contributes to the strengthening of ecotourism as practiced in Bulgaria, and integrates ecotourism into the national sustainable tourism development agenda. NETSAP's development acknowledges that ecotourism is a significant part of Bulgaria's sustainable development agenda, providing Bulgaria with a framework for developing ecotourism policy and for linking ecotourism with integrated land use and land use planning. The Plan provides Bulgaria with a tool to galvanize local social and political elements of rural development and link them to income generation, economic growth, and improvements in rural economies. Ecotourism provides value to local practices and traditions; it embraces economies of scale and sustainable business growth.

The NETSAP confirms Bulgaria's role as a model for ecotourism development in the Balkans and Europe. This document is predicated on the need for Bulgarians to understand that the cornerstones of their national pride—the country's natural environment, traditions and customs, history, and rural way of life—are valuable not just to Bulgaria, but to the rest of the world. Bulgaria can begin to capitalize on these cornerstones as a competitive advantage in a world that is rapidly losing these qualities.

The Strategy outlines the development of ecotourism in Bulgaria for a period of *ten years*. The Action Plan covers a period of *five years*. Because Bulgaria possesses so many preconditions for ecotourism, it has a strategic opportunity to turn ecotourism into a profitable and beneficial dimension of Bulgaria's sustainable tourism agenda. The National Strategy and Action Plan also suggest geographical foci for ecotourism development in Bulgaria.

Ecotourism Defined

Ecotourism has been marketed as a form of nature-based tourism. However, since 1990, nongovernmental organizations (NGOs), development experts, and academics have adopted it as a sustainable development tool. The term ecotourism refers on the one hand to a concept based on a set of principles, and on the other hand to a specific market segment. In 1991, the International Ecotourism Society produced one of the earliest definitions:



“Ecotourism is responsible travel to natural areas that conserves the environment and sustains the well being of local people.”

In 1996, the World Conservation Union (formerly the IUCN) said that ecotourism:

“...is environmentally responsible travel and visitation to relatively undisturbed natural areas, in order to enjoy and appreciate nature (and any accompanying cultural features - both past and present) that promotes conservation, has low negative visitor impact, and provides for beneficially active socioeconomic involvement of local populations.”

At the First National Forum ‘Ecotourism, Mountains, and Protected Areas – Partners in Prosperity,’ (2002), the Ministry of Economy (MOE), the Ministry of Environment and Waters (MOEW), and the Ministry of Agriculture and Forests (MOAF) signed a Protocol for Cooperation for the field of ecotourism. In this document, the three ministries provided the following national definition of ecotourism:

“The Ministries endorse the common understanding of ecotourism as travel to relatively undamaged natural areas, aimed at providing the visitors with opportunities to view and enjoy nature and all accompanying cultural attractions, while at the same time encouraging their preservation and allowing the lowest possible impact. Ecotourism is also a form of small and medium enterprise development, an opportunity for developing businesses related to all affiliated services, mainly through small local enterprises, which ensures the social and economic vitality of the local population, and the just allocation of responsibilities and benefits. Ecotourism comprises important elements of nature protection, conservation education, interpretation of the natural and cultural heritage, and it complies with all forms of sustainable tourism.”

In all cases, ecotourism should strive to achieve sustainable development results. It is also important to stress that all tourism activities, be they geared to holidays, business, conferences, congresses, fairs, health, adventure or ecotourism, should endeavor to be sustainable. This means that the planning and development of the tourism infrastructure, and its subsequent operation should focus on environmental, social, cultural and economic sustainability criteria.

The strong orientation of ecotourism toward the principles, guidelines, and certification based on sustainability gives it an unusual position in the tourism field. In the years since the concept was first defined, a consensus has formed in Bulgaria on the basic elements of ecotourism:

- It contributes to biodiversity conservation;
- It sustains the well being of local residents;
- It promotes responsible actions on the part of tourists and the tourism industry;
- It requires the lowest possible consumption of nonrenewable resources;
- It is delivered primarily to small groups by small-scale businesses;



- It stresses local participation, ownership and business opportunities, particularly for the rural population; and
- It includes an interpretative/learning experience.

General International and National Trends of Tourism Development

Ecotourism is part of a growing niche market of the tourism industry. In 1997, the World Tourism Organization (WTO) estimated the entire tourism industry was made up of 595 million international travelers, expending US \$425 billion. Tourism is expected to grow an average of 4.3% per year over the next 20 years with receipts climbing by 6.7% per year. Nature (eco) tourism generates 7% of all international travel expenditures (Lindbergh, 1997). The World Resources Institute (1999) found that tourism overall grows at an annual rate of 4%, while nature (eco) tourism increases 10% to 30% per year.

The Bulgarian ecotourism market is in a period of dynamic growth. There is a real opportunity for Bulgaria to become a regional and European leader in this emerging market. International tourist arrivals to Bulgaria increased in 2002 by 8.6% from 2001 figures, representing 2.992 million international tourists (according to the Ministry of Economy). The income generated from tourism increased by 11.1% over the same time period, amounting to US \$1.334 billion (transportation excluded). In 2002, Bulgarians traveling abroad spent 8.24% more than they did in 2001.

According to preliminary data provided by the Ministry of Economy, the number of tourists who have visiting visited Bulgaria in 2003 was by 18.01% higher than larger than the same number for 2002, or approximately 3.5 million visitors. The largest share of visitors came from Germany. In 2002, 480,460 German tourists visited Bulgaria, up 28.35% from 2001. The largest increase in visitors was from Great Britain, up 60% from the previous year (110,902 British tourists visited Bulgaria in the first eight months of 2002). These tourism market trends bode well for Bulgaria and reflect positively on the development of its ecotourism market segment.

The Challenges of Biodiversity Conservation, Cultural Heritage and Economic Growth

Bulgaria is the first European country to develop (1992-1994) and implement (1995) a National Biological Diversity Conservation Strategy (NBDCS). Since that time, Bulgaria has consistently developed policy and basic legislation necessary to support the implementation of modern nature management practices. Two elements are critical to sustaining these achievements. The first is that protected area management must include benefits for the people living around the protected areas; and the second is that financial mechanisms must be developed to sustain both conservation activities and improvements to rural livelihood. Bulgaria faces with the same challenge. It must provide benefits to the individuals, businesses and government to preserve the Bulgaria's rich, diverse cultural heritage —developing financial mechanisms and incentives.



Bulgaria was one of the first countries in the world to adopt and apply the *Guidelines for Activities Related to Sustainable Tourism and Biological Diversity*. These guidelines are produced by the Convention on Biological Diversity (CBD) and have been used to guide the process of developing and planning the National Ecotourism Strategy.

Over the past 14 years, Bulgaria has been in a period of difficult transition. Changes have led to the significant impoverishment of many people residing in small, rural sites—most in close proximity to natural areas, and cultural and historic monuments. Ecotourism provides an important opportunity for these regions to recover economically. Natural and cultural resources are available for development, with little significant investment. As ecotourism is usually developed by small or family businesses, it can provide incentives for more local residents to stay and work in rural areas, stem emigration, and create many more centers of local economic prosperity.

Many attempts have been made to practice ecological, cultural, and other forms of sustainable tourism in Bulgaria. To date, there has been no systematic approach and strategic consistency to these efforts. A sustainable, ecotourism development strategy will help to guide an important segment of the country's tourism development efforts. The Strategy will further Bulgaria's efforts to provide regional leadership, and to give the country a competitive edge in both the expanding domestic and international tourism markets. Bulgaria is among the first countries in Europe to develop an ecotourism strategy on this scale.

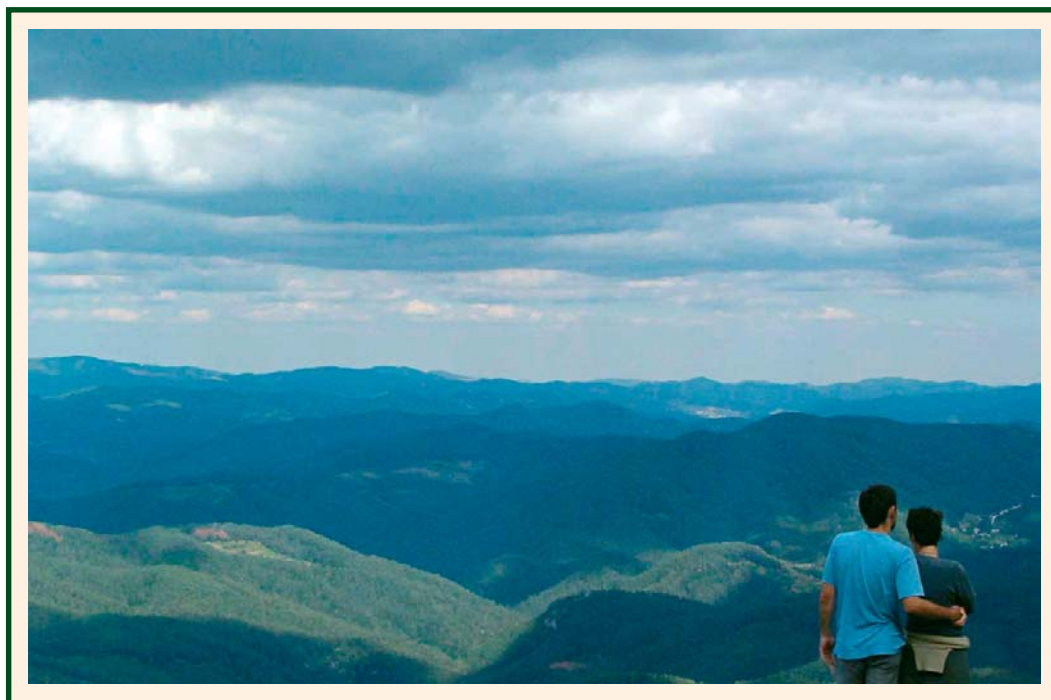




NATIONAL ECOTOURISM STRATEGY (NETS)

NATIONAL ECOTOURISM STRATEGY AND ACTION PLAN





*Rhodopes
landscape*

*RTA "Rhodopes"
Archives*

The National Ecotourism Strategy (NETS) originates from a host of different initiatives. Some of these initiatives were based on private sector efforts to offer alternatives to mass tourism. Bilateral and multilateral donors have supported some of these efforts. Other initiatives include those to engage communities in protected area tourism development activities inside and outside parks. The Ministry of Environment and Waters (MOEW), through the Bulgarian national parks, has taken the lead in linking these communities to ecotourism development efforts in protected areas. "Models" for community-based ecotourism were implemented by the Rila and Central Balkan National Parks, with the support of the United States Agency for International Development (USAID)/Bulgaria-funded Biodiversity Conservation and Economic Growth Project (BCEG) and the Ministry. The national parks' working model includes establishing ecotourism partnerships that are the products of a "participatory planning process." These partnerships work to support the mutual interests of local tourist development and promote local involvement in nature conservation efforts. Two ecotourism associations resulted from partnerships promulgated by the national parks' working model: the Rila Ecotourism Association in Samokov, and Ecotourism Association Central Balkan in Kalofer. Each association is an institutional partner of their associated national parks and leaders of ecotourism initiatives in their communities and surrounding regions.

The preliminary success of these models, as well as the efforts of other protected areas and regional tourism associations, stimulated the creation of a National Working Group in February 2002. This group was charged with analyzing conditions and recommending improvements to the national tourism policy to support ecotourism development. The group includes representatives from MOEW; Ministry of Economy (MOE); Ministry of Agriculture



and Forests (MOAF); national, regional and local tourism associations; conservation NGOs; and the Foundation for Local Government Reform (FLGR).

The MOE challenged the national working group to draft a national ecotourism strategy as a component of the national tourism development strategy. The planning process began in May 2002 with participants from the private sector, civil society, key national-level governmental institutions including the Ministry of Culture, and local authorities. USAID again supported this effort, and provided technical assistance and funding.

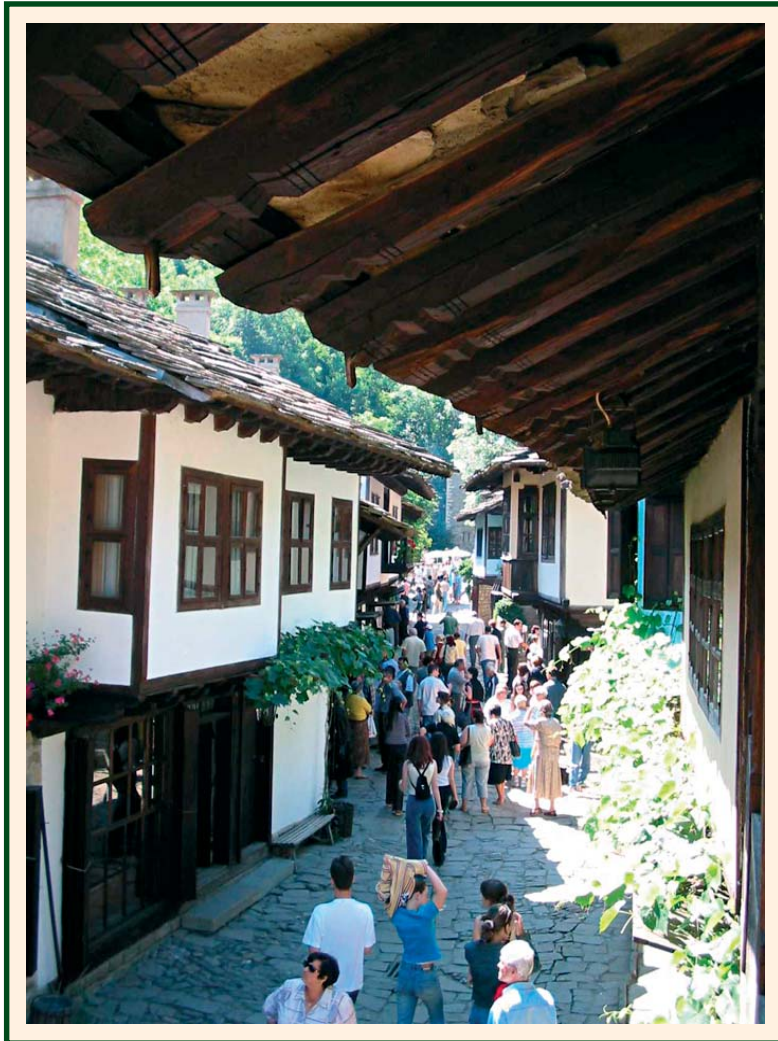
The first draft of NETS was presented to the public at the National Forum for Ecotourism, Mountains, and Protected Areas, in October 2002, in Sofia. The second NETS draft evolved from Forum discussions, a special session of the NEW Group, and contributions from representatives of several international organizations involved in ecotourism, including the United Nations Environment Program (UNEP), the World Travel and Tourism Council (WTTC), the World Tourism Organization (WTO), The International Ecotourism Society (TIES), International Council of Monuments and Sites (ICOMOS), European Council, and Protected Areas Network (PAN) Parks.

This second NETS draft was presented at the National Ecotourism Workshop in February 2003. More than 150 participants attended the workshop, including representatives of seven ministries, the Parliamentary Commission of Environment and Waters, protected area managers, national tourism organizations, national and regional municipality associations, NGOs, regional and local tourism associations, national and international donors, commercial banks, private entrepreneurs, universities, regional governors, and local government mayors. The current NETS reflects comments of these participants and written comments submitted after the workshop. The *Guidelines for Activities Related to Sustainable Tourism and Biological Diversity* guided stakeholders during these processes.

International experts have stated repeatedly that the Bulgarian National Ecotourism Strategy process is an outstanding case of interministerial and intersectoral cooperation. Both NETS and the process used for its development set important precedents in the field of international ecotourism and sustainable tourism development. Prime Minister, Simeon Saxe Coburg-Gotha, emphasized Bulgaria's leadership role in his opening remarks at the National Forum on Ecotourism, Mountains and Protected Areas.

"We are convinced that by committing ourselves to support the development of ecotourism, the Bulgarian government is making another strategic step towards the country's economic prosperity and its accession to the European Union. A well-preserved natural heritage and opportunities for development of nature-based tourism are positive values. Bulgaria can lead the way in making this contribution to the European value system."





*Etara Ethnographic
Open Air Museum*

This section summarizes the present ecotourism sector in Bulgaria. This information has been collected and reviewed by more than 30 experts, from 23 institutions, between October 2002 and June 2003. Contributors reviewed a number of documents, publications, reports and surveys that were connected to ecotourism in the country (see Appendix 1). Gathering information for NETS highlighted significant information gaps related to ecotourism (e.g., the number of ecotourism visitors, or who the ecotourism provid-

*RTA "Stara Planina"
Archives*

ers are in the country). The authors' information-gathering efforts also illustrate that few efforts have yet been made in Bulgaria to understand the international or domestic ecotourism markets. But the studies do illustrate that ecotourism is a growing sector of the national tourism market, and that ecotourism products and clients can be recognized as a legitimate competitive cluster within the national tourism sector.

More detailed summaries of each of the ecotourism sector components in Bulgaria, as of June 2003, have been published on the national ecotourism website: www.ecotourism.bulgariatravel.org. Regional ecotourism strategies further contributed to the national profile for ecotourism, and will supplement the national picture of this growing and competitive subsector.



To develop the structure for this ecotourism strategy, the following information has been collected and summarized under the following headings:

- Resource Diversity
- Policy Framework
- Stakeholders
- Infrastructure
- Market Trends

Resource Diversity

The biodiversity and the protected areas of Bulgaria are crucial to the development of ecotourism. A system of protected areas, covering nearly 5% of the country's territory, has been put in place to protect and preserve the biologically diverse areas of the nation's natural environment. Bulgaria is in the process of creating a National Ecological Network (NEN) to prioritize biodiversity conservation in areas outside the national protected area system—primarily in the nation's agricultural, forested, and riverine/wetland areas. The NEN will form part of the NATURA 2000 European ecological network a portion of Bulgaria's contribution to biodiversity conservation. The NEN will be a key element for sustainable development in the country, and ecotourism will be an important tool for realizing the goals of this national network. The NEN will also provide criteria for land use planning, natural resource use, industrial development, and private sector growth.

The cultural and historical heritage of the country are also central to ecotourism development in Bulgaria. There are more than 40,000 sites cultural and historical sites in the country that have been recognized as nationally and internationally significant. These have been afforded the status of "protected sites." In addition, there are literally hundreds, if not thousands of events, traditions, and ceremonies that are at the heart of Bulgaria's cultural richness and diversity. While there is national context for most of these, Bulgaria's topographical and regional diversity offers intriguing permutations and variations of these practices.

Policy Framework

The national policy framework for the development of ecotourism includes eight national strategies and plans in the fields of biodiversity conservation, forestry, water management, agricultural development, regional development, and business development, as well as 10 national laws. In addition, Bulgaria is signatory to 26 international conventions that contribute to a national framework for ecotourism in the country.

This policy framework is a solid foundation for building a national ecotourism agenda. Even more important, the efforts to build a national ecotourism strategy point to the need for a national sustainable tourism development strategy. This is the larger imperative. Recent successes in the growth of the tourism sector in Bulgaria must be matched by a national strategy that embraces many of the same tenets of ecotourism.



Stakeholders

The main ecotourism stakeholders include:

○ *Governmental Institutions*

Five ministries (Environment and Water, Economy, Agriculture and Forests, Culture, and Regional Development and Public Works) are essential actors in the development of ecotourism and tourism in Bulgaria. A national strategy for this sector should focus on collaboration between its representatives and branch offices at all levels of national, regional and local government.

○ *Nongovernmental Organizations*

- National Tourism Associations: There are three national tourism associations with over 1000 members: the Bulgarian Association of Tour Agents, the Bulgarian Tourism Chamber, and the Bulgarian Hotels and Restaurant Keepers Association. These large associations can form a major building block for ecotourism product development, marketing, and information management.
- National Specialized Tourism Associations: There are three national tourism associations that play a role in the development of the ecotourism subsector in Bulgaria: the Bulgarian Association for Alternative Tourism (BAAT) and the Bulgarian Associations for Rural and Ecological Tourism (BARET), with a total of 150 members combined; and the Bulgarian Tourism Union (BTU), with 162 branches and approximately 6000 total members.
- Registered Regional Tourism Associations: There are five regional tourism associations with a total of 400 members: the Pirin Tourism Forum, the Tourism Association of Rhodopes, the Bourgas Tourism Association, the Regional Tourism Association of Stara Planina; and the Varna Tourism Chamber.
- Local Tourism Associations: There are over 100 local tourism associations (which includes local tourism councils) with more than 1000 members.
- Conservation NGOs: There are more than ten conservation NGOs active in ecotourism.
- NGOs working in support of local government reform: Two groups focus on tourism development as a tool in these reform efforts: the Association of Municipalities in Bulgaria, and the Foundation for Local Government Reform.
- Local and Regional Tourist Information Centers: More than 50 information centers operate within municipalities and protected areas.

○ *Tourism Sector*

Over 90% of the tourism industry in Bulgaria is privatized. There are more than 1000 registered tour operators and more than 500 registered tour agents in the country. The typical local tourist agency is small, with 1 to 15 employees. There are fewer than 10 large tourist agencies operating in the sector—the largest are Balkantourist and Albena. There are no official statistics on the number or types of companies that specialize in ecotourism.



Bulgarian tour operators engaged in ecotourism can be divided into three groups:

1. Tourist companies or agencies that only provide accommodation (overnight stays or overnight stays and breakfast). This is the largest group.
2. Tourist companies or agencies that offer products such as outdoor environmental schools or summer mountain trips. This is the second largest group and includes agencies such as Pirintourist 2000, Radetski Tourist Bureau, and Orbita.
3. Tourist agencies or companies that offer comprehensive, specialized packages for ecotourism. Examples of this group include Pandion, Neophron, Zig-Zag Holidays, Lyub-Travel, Odysseia-INN, Lucky Tours, and Vegena.

International tour operators work almost exclusively with local partners and/or representatives in Bulgaria. International operators can be divided into two groups:

1. Companies engaged in mass tourism that include elements of ecotourism in their holiday packages, or offer it as an option (e.g. Neckermann, TUI).
2. Companies that primarily offer specialty packages, including ecotourism (e.g., Trekking y Aventura/Spain; Teres d'Adventure/France; Walking Softly Adventures; Ramblers Holidays; Exodus; Explore/UK and USA, Wikinger/Germany, SNP/Netherlands, etc.).

Most Bulgarian ecotourism providers are small entrepreneurs with minimum equity and extremely limited resources. Ecotourism providers tend to be family businesses focused on accommodation, with family members as employees. There is a growing tendency among these small businesses to diversify their offerings and provide special programs for hiking, picnics, horseback riding, crafts, nature observation tours, craft production, and bicycling. These offerings are irregularly based on market demand. Experience with ecotourism product development, services and quality remains limited.

There is no regional or national listing of ecotourism establishments. A high percentage of these establishments are not registered, and they have no national association serving their needs. There is little in the way of regional or municipal support for these businesses or their development. A growing number of these facilities, however, are banding together in local and regional ecotourism and tourism associations in order to benefit from collaborative activities such as marketing, sales, reservations, and service packages.

Marketing is largely undertaken on an individual basis. Most marketing is by word-of-mouth, and remains largely domestic in focus.

There are many local tourism databases/inventories (at least 12 regionally focused ecotourism inventories of sites, services, accommodation and crafts) that have been created through donor projects and programs in the country.

○ *Investors*

Ecotourism financing remains a challenge. Most banks view ecotourism projects as small and medium enterprise (SME) loans, which must meet a standard set of loan approval criteria. Thus many banks have advised that rural, community-based and local ecotourism projects use private equity first



and then, after a couple of years with a successful operating history, apply for a loan. There are, however, a growing number of investment banks that are increasingly supporting ecotourism development, focusing at the village/community level. These include Hebrosbank, Bulgarian-American Credit Bank, United Bulgarian Bank, Encouragement Bank, and First Investment Bank.

- *International Donor Projects and Programs*

Over the last 10 years, more than 25 different donors programs and projects in the fields of tourism development, biodiversity and cultural heritage conservation, local government development, NGO sector development, and regional planning have focused on rural and ecotourism development. These efforts have been funded by multilateral funding institutions (World Bank, UNDP, GEF, EU), or through bilateral support programs (USA, Switzerland, UK, Japan, Germany, and Netherlands). There is no systematic record of donor contributions to ecotourism development, and no record of Bulgarian government counterpart contributions.

Infrastructure

Infrastructure cannot be specifically isolated for the purposes of ecotourism. Rather, infrastructure must be viewed as it relates to rural areas that are the focus of ecotourism. Documentation provides general information on transportation networks, power and heating supply, water supply, sewage and waste management, communications, and telecommunication networks. While the nation's tourism infrastructure is generally well developed, it remains largely focused on two tourism focal areas—ski resorts and the Black Sea coast.

The ecotourism infrastructure and supporting facilities are widely diverse throughout the country. Accommodation and services vary widely in quality. Ecotourism development is largely dependent on improvements to infrastructure and access related to remote rural areas, communities living in support zones to protected areas, and municipalities that serve as hubs for ecotourism facilities and activities.

A review of the literature (Appendix 1) indicates a need for significant improvements to the system of mountain chalets used for accommodation, energy production and conservation, and solid waste management. It is also evident that the current national solid waste management system and derelict infrastructure are eyesores and deterrents to ecotourism goals throughout the country.

Market Trends

The domestic and international market trends presented below are based on market surveys conducted in 2001 and 2002.

- *Domestic*

The growing domestic tourism market could become a significant player for national ecotourism development. Over the last few years, evidence indicates a national domestic tourism market that is growing and increasingly focused on ecotourism.



In 2001, more than one million Bulgarians, aged 18 or older, traveled for leisure. They spent a total of 330 million BGN on leisure travel within Bulgaria. Most live in the capital, Sofia, or in large regional towns. Most have a college or post-graduate degree. Many spend their summer holidays in small villages on the Black Sea coast. One-quarter (250,000) of them traveled to the mountains and other resorts.

Of these one million Bulgarians, there is a strong indication that the potential domestic ecotourism market ranges between 140,000 and 180,000 people. Most of these "ecotourists" again come from large cities, primarily from Sofia. In 2001, this group spent at least 28 million BGN on overnight accommodations, and can be broadly associated with ecotourism activities.

○ *International*

Ecotourism is part of the growing international market niche of the tourism sector. In recent years, cultural tourism has developed as one of the most successful tourism sectors worldwide. The number of tourists motivated by nature and cultural heritage is steadily growing. Particularly successful tours include itineraries offering complete packages with diverse types of cultural heritage and natural sites, combined with well-developed tourist, information and transportation infrastructure.

There is no information on international nature and cultural visitors to Bulgaria. There have been no attempts as yet to track the number of these visitors to Bulgaria. Of the estimated 3.53 million visitors to Bulgaria in 2003, it can be safely assumed that less than 5% visit for ecotourism purposes, based on observations and industry sources.





*Kovachevitsa
village,
Rhodopes*

*RTA "Rhodopes"
Archives*

Results of the analysis of Bulgaria's ecotourism industry can be summarized using the following strengths, weaknesses, opportunities and threats (SWOT) framework. A more detailed situation analysis is provided online at www.ecotourism.bulgariatravel.org.

Ecotourism in Bulgaria has the following **strengths** and **weaknesses**:

Strengths

- The country is characterized by rich biodiversity, an invaluable cultural and historical heritage, long-standing traditional practices and beautiful landscapes, along with a favorable climate, diverse water resources, and a strategic location at the crossroads of Europe and Asia.
- State policy provides a comprehensive environmental management and conservation framework. Strategic national programs for territorial planning, economic development, decentralization, and local government reform are now underway.
- Key government institutions are increasingly committed to using ecotourism as a tool for natural and cultural conservation and economic growth. The nation's protected area system and its managers are playing a lead role in ecotourism development. In addition, ministries are aware of the interdisciplinary nature of ecotourism, and have begun to coordinate ecotourism development efforts and financial sup-



port. The Ministry of Culture has extensive experience in protecting the nation's cultural and historical heritage, and is increasingly turning to local government and the citizenry to engage their support in its maintenance and protection.

- Bulgaria's current focus on major infrastructure growth and maintenance has impacts for ecotourism development. Subsequently, there are no new, major infrastructure investments required for ecotourism at macro levels. In addition, the private sector has become a more active investor in this field.
- Private sector investment is increasing throughout the ecotourism sector, as a result of growing returns from tourism and ecotourism. Efforts to market the ecotourism sector locally and internationally have increased; tourism development is becoming more broadly distributed in the country; and ecotourism entrepreneurs and products are becoming more diverse, with generally reasonable prices. Donor programs continue to support small and medium business development in this sector.
- A variety of nongovernmental organizations (NGOs) are using ecotourism as a sustainable development tool. They are promoting links between the public and the private sector to promote ecotourism, particularly in small communities where such relationships are easier to build and maintain.
- The successful privatization of many, existing tourism facilities and the development of new facilities reflects well on tourism financing to date. Opportunities to access funds are growing with the help of the government, donors and the private sector. As the Bulgarian currency and banking system have stabilized, more bank loan programs have materialized to support ecotourism development. Recent loan programs have expanded to include environmental management, including those improvements needed for hotel power supply, waste management, and other support services.
- Positive market trends indicate that tourism is a successful developing sector of the national economy. Bulgaria is increasingly viewed as a destination for vacationers seeking cost-effective vacations. In addition, Bulgaria is slowly becoming known as a destination for niche market visitors. Recent years have evidenced a growing interest in Bulgarian ecotourism products as a specific segment of international and domestic markets.
- Marketing ecotourism in Bulgaria can be accomplished effectively with existing publicity, advertising and marketing efforts/channels. Bulgaria's progressively sophisticated use of these channels can only benefit ecotourism. There is increasing evidence that tourists and suppliers are seeking to diversify tourist packages by including ecotourism components. In addition, there are clearly defined "niche" publicity and marketing channels that can be used to advance ecotourism in the country.

Weaknesses

- Macro-level deficiencies that affect the subsector include:
 - Unsustainable agricultural and forestry practices,
 - Large-scale emigration from rural areas to cities and towns,



- Loss of traditions and cultural practices,
 - Decrepit and inefficient infrastructure that mar the landscape,
 - Absence of area specific management plans, and
 - Inadequate conservation and cultural planning and management skills. While there are growing attempts to decentralize planning and management, these efforts are still inadequate to advance community roles and benefits from ecotourism.
- Ecotourism resource information has not been systematically organized and managed. Interpretive programs and materials have not yet been successfully integrated into ecotourism product development. In addition, ecotourism is largely unorganized and uncoordinated among protected areas, cultural sites, and local government.
 - There has been no effort as yet to capture profiles of international or domestic tourist expectations, practices, needs, and expenditures—only limited statistics exist in relation to ecotourism and ecotourists. At present, it is impossible to determine what percentage of visitors to Bulgaria use and/or are interested in ecotourism products.
 - Bulgaria still lacks a comprehensive modern policy for tourism development. It has still not set a vision and an agenda for sustainable tourism development in the country. In addition, ecotourism has been poorly integrated into national, regional, and municipal development plans. Rural tourism development remains largely ignored as an economic growth and income generating opportunity for local governments.
 - Institutions that use ecotourism as a tool for rural development, economic growth and conservation tend to be inexperienced. Successful ecotourism projects within these institutions appear to be largely based on the strength of personalities and not on institutional and organizational capacities. Ecotourism support and development are not required in job descriptions, nor is ecotourism recognized as a discipline within these institutions. Cooperation between these agencies is still at a nascent stage. Mechanisms for effective collaboration and cooperation at national and local levels still need support and reinforcement.
 - Bulgaria lacks guidelines on limits of acceptable use/limits of change related to conservation and cultural sites. These limits have yet to be incorporated in adaptive management strategies, and are not coordinated between site managers, local government, and rural communities.
 - Ecotourism training (human resources development) has not yet been effectively incorporated into Bulgaria's educational system and institutions.
 - Ecotourism development does not need large-scale infrastructure development. Yet, guidelines and investment packages that support local infrastructure development need to be established and associated with ecotourism. These guidelines and investment packages are lacking in rural areas and many local municipalities. Efforts include much needed improvements to solid waste management, the removal of decrepit infrastructure, second, third and fourth-class road rehabilitation, and basic visitor infrastructure for protected areas and cultural sites.



- Visitor services and quality assurance are limited and generally underdeveloped.
- Ecotourism information is poorly managed and coordinated. There are no standards for ecotourism information management, and no way to share information quickly and cost-effectively between ecotourism suppliers, providers, and the marketplace.
- Ecotourism financing is severely limited. Private sector banks do not adequately fund rural ecotourism development, as risks tend to be high, and returns fairly limited. Banks lack collateral, and ecotourism businesses are generally operating at a scale that needs creative incentives and subsidies to start up and operate. Equity remains limited, and business skills among rural ecotourism entrepreneurs are poorly developed.
- There are no consistent technical assistance and business support programs for ecotourism. Ecotourism business development is ad hoc and speculative—it is not yet a rural development strategy or a business development tool. Its growth is presently left to chance rather than as a tool of government policy. Incentives for small ecotourism business development are few.
- The role of NGOs in ecotourism in Bulgaria is evolving. A variety of regional programs that support ecotourism development are working effectively, but these efforts are poorly coordinated. Communication between initiatives is poorly developed. Ecotourism objectives tend to be poorly described, and ecotourism activities rarely get incorporated into municipal and district planning. Existing regional tourist associations have developed substantial experience, but they are less effective because of the absence of an inter-regional collaborative network, capacity-building programs, and a national structure representative of their programs and needs. Environmental NGOs operate largely experimental ecotourism programs that are not generally integrated into regional and district institutional frameworks. Many of their programs have not been used effectively by protected area managers and municipalities.
- Bilateral donor support is gradually decreasing, placing greater demands on multilateral donors, the Government of Bulgaria, the private sector, and alternative financing mechanisms to meet the challenges of ecotourism development in the country. The mechanism(s) for coordinating this assistance is not yet developed.
- The domestic ecotourism market is poorly developed. While this market offers some of the best opportunities for local entrepreneurs to develop and test products, collaboration between rural ecotourism providers, Bulgarian tourism operators, and national and regional marketing efforts remain limited. Resources to market and promote domestic tourism are absent, as is information on customers' expectations and needs.
- Weak national marketing and advertising campaigns for ecotourism have missed the opportunity to emphasize ecotourism as part of Bulgaria's national identity as well as a competitive advantage. International markets and international suppliers have not been offered a national image of Bulgaria as an ecotourism destination. Only the most limited attempts have been made by the Bulgarian tourism private sector to diversify their offerings, and there have been few efforts to link



national public and private sector marketing campaigns with the ecotourism theme. There is a general absence of coordination on efforts to diversify the international tourist experience, and marketing efforts have a narrow geographic focus.

- Participation in international trade fairs that focus on ecotourism and associated niche markets remains severely limited.

Opportunities

External Conditions have been analyzed to determine their impact on the nation's strategic goals for ecotourism. There are a number of favorable *conditions/opportunities* inside and outside the country, which can be used to support the development of ecotourism in Bulgaria.

- The overall *socioeconomic and political situation* in Bulgaria favors the development of ecotourism as a specialized subsector and tool for local development.
- The national policy includes *programs for the development of small and medium-size business*. *The role of NGOs* in the country's social, economic and political life has changed radically and NGOs are becoming real development partners with government. The last seven years have witnessed consistent efforts to *decentralize the state's role and responsibilities* and delegate them to local government bodies. This process is reflected in a growing trend to transfer responsibility for overall social and economic development to local levels.
- On the whole, *international trends in ecotourism* reflect a higher level of interest, growth and expenditure than conventional tourism. Internationally, ecotourism is experiencing a consolidation in the marketplace. There are growing numbers of international tourism suppliers and providers who specifically market ecotourism and niche market users. Bulgaria is well poised to capture a significant portion of this market as many operators are looking for new packages and new destinations.
- *Successful privatization* of the tourism industry *combined with successful marketing and package pricing* for Bulgaria has propelled a significant increase in international arrivals to Bulgaria. *International tourists are increasingly viewing Bulgaria as cost-effective destination*. This is the basis for market and product diversification. International tourist arrivals increased in 2002 by 8.6%. In 2003, this number increased by 18%. The income generated from tourism in general increased by 11.1% in 2002, and amounted to US \$1.334 billion, excluding transportation. On a proportional basis, the industry can be assumed to generate in excess of US \$1.5 billion/year.
- *International trends and support for the development of ecotourism and cultural tourism are extremely favorable*. The designation of 2003 as the International Year of Ecotourism, and the added legitimacy of this industry stemming from the Quebec Declaration (2002), gave a powerful impetus to the international development of ecotourism. Cultural tourism is also increasing in importance in the international market. Campaigns to celebrate a "common heritage" for Central and Eastern Europe emphasize the diversity and significance of culture within a common European framework.



- *Bulgaria is a safe and unexplored country.* Bulgaria is regarded as the most politically stable country in the Balkans. In addition, while Bulgaria is close to Western Europe, it is still perceived as a place that remains unexplored and generally unknown. This can be the basis for an effective campaign of national promotion and international discovery.
- *Bulgaria is at the crossroads between Asia and Europe.* In the last few years, there has been an increasing interest in the role Bulgaria plays as a political, economic, cultural and conservation bridge between Turkey, Greece, and Europe.
- *The EU pre-accession process and NATO membership* contribute to Bulgaria's international recognition as the country moves to respond to accession guidelines. Reforms to national policy and legislation are supportive of a national ecotourism strategy and action plan.

Threats

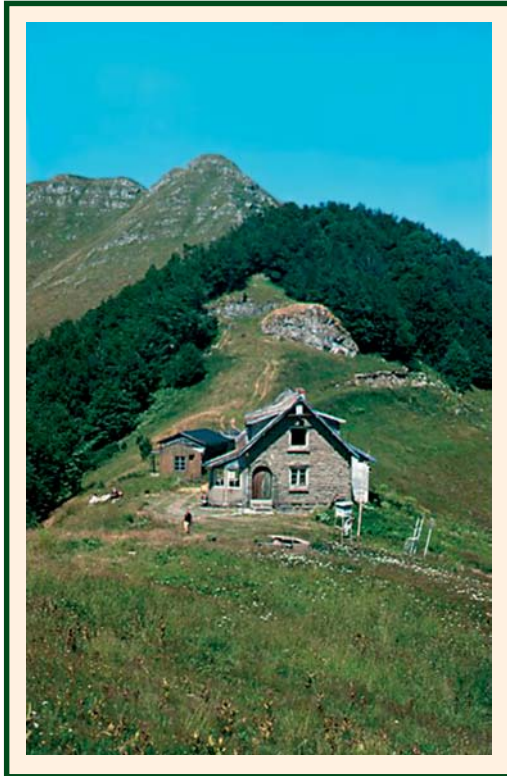
Threats are external factors that can deter ecotourism development in the country. The ecotourism sector cannot affect these factors, or attempt to circumvent them.

- Both Bulgaria and southeastern Europe are in the process of *transition to a market economy*. Investment risks generally remain expensive and high. There are still lengthy administrative procedures for private sector business. An earlier period in Bulgaria witnessed the temporary collapse of the banking system and corruption, and unfamiliarity with the administration of market systems have characterized this transition.
- The global threats to tourism arising from *international terrorism* create an uncertain future for the tourism industry as a whole and for international travel. Additional security precautions and the costs of anti-terrorist measures result in higher airport taxes and higher air travel costs.
- There are significant *competing demands* for government support and financing in Bulgaria—for social welfare and education sectors, and for rural infrastructure upgrades. Competing agendas at the national and local levels for scarce resources could detract from realizing ecotourism goals.
- An *unstable political future for new and emerging republics* in the Balkans can still deter international travel, development and economic growth in the region. It is in Bulgaria's best interests to work with others to build a secure future for the region. Ecotourism development and cross-border cooperation may be one such tool.



Ecotourism – a Sustainable Development Tool and Competitive Advantage for Bulgaria

4.



*Mazalat chalet,
Central Balkan*

Ecotourism is a cornerstone of Bulgaria's national tourism development strategy and a viable tourism sector. More importantly, it is a tool for improving local livelihoods in Bulgaria's rural areas, and it is a sound mechanism for biodiversity conservation inside and outside of the protected area system. Ecotourism is the natural choice for Bulgaria in its desire to develop sustainable livelihoods and land use, and conserve its natural assets. Thus, the National Ecotourism Strategy (NETS) reflects the number and diversity of public and private initiatives throughout the country. The continued engagement and focus on these achievements and the role of local government and local people is crucial for ecotourism development in Bulgaria.

*Central Balkan
National Park
Directorate
Archives*

A Vision for Ecotourism in Bulgaria

4.1.

Ecotourism will be an essential element of Bulgaria's sustainable development agenda. As an important part of sustainable tourism, it is a tool for biodiversity conservation and development of rural, mountain and semi-mountain regions. Ecotourism will become a pillar of national tourism development and a viable element of the national economy. It will be a real alternative for the improvement of livelihoods in rural communities. It will become a major contributor to Bulgaria's competitiveness in world markets. Ecotourism will become an important part of local government planning, revenue generation, and civic pride. In combination with aspects cultural tourism, it will continue to be an important complement to Bulgaria's culture and its preservation.

Ecotourism will be an essential element of Bulgaria's sustainable development agenda. As an important part of sustainable tourism, it is a tool for biodiversity conservation

This strategy recognizes that Bulgaria is at a crossroad in the development of its national tourism identity and position in the world market. Ecotourism will become synonymous with international perceptions of Bulgaria, and will become part of Bulgaria's promotion and image development at home and abroad. Bulgaria will become known for:

- Decentralized, sustainable tourism networks supported by a recognized system of planning, development and investments;
- High operational and maintenance standards of environmental management systems supported by the private and public sectors;
- Its capture of a significant portion of the European travel market dedicated to the principles and practices of ecotourism;
- Regional leadership in cross-border tours and travel based on ecotourism, and related to the natural themes and culture of the Balkans and southeastern Europe; and
- Its successful combination of nature and cultural tourism.



Bulgaria will offer high quality tourism products throughout the year, taking advantage of the diversity, uniqueness, and authenticity of its natural and cultural resources. These products will be targeted to national and international visitors who are responsible, caring and supportive of nature protection, biodiversity conservation and Bulgaria's cultural heritage. Ecotourism for Bulgaria, therefore, is a brand of tourism that:

- Contributes to local economic growth and social development;
- Attracts international tourists at higher expenditure levels, and for longer periods of time throughout the year;
- Contributes to the domestic tourism market throughout the year;
- Diversifies existing tourism products and services by expanding regional and trans-boundary cooperation;
- Develops positive attitudes and knowledge in Bulgarian communities towards biodiversity conservation and cultural preservation and interpretation;
- Perpetuates and develops environmental friendly livelihoods;
- Expands the number of tools and financial mechanisms for preserving natural and cultural resources; and
- Drives infrastructure development in appropriate, environment friendly ways.

Implementation of this NETS in coordination with the Cultural Tourism Development Strategy (CTDS) is expected to lead, over the next 10 years, to the following results. These results can be organized into four major themes that in turn serve as the framework for NETS.

A. Conservation and Preservation of Biological and Cultural Resources

- Viability of the national system of protected areas and cultural sites is strengthened;
- Implementation of the National Ecological Network and Bulgaria's leadership in applying EU standards of NATURA 2000 principles of landscape classification and conservation is adopted as a planning tool; and
- Cultural and historical heritage, the identity and practices of Bulgarian people, and the diverse offerings found in the country's regions are preserved.

B. Regional and Local Development

- A process and procedures for decentralized ecotourism planning and fiscal management with strong local accountability is attained;
- Commitment and support of the local people toward natural and cultural heritage conservation and ecotourism development is improved;
- Regional networks of institutions and organizations that serve as the basis for ecotourism marketing, product development, financial investments, and business development are established and operating;
- Ecotourism, sustainable tourism, and environmental management systems are embraced as part of local government planning and operations;
- Ecotourism and cultural tourism revenue-generating mechanisms are established and evaluated as fair and supportive of natural, cultural and historic resources, as well as of infrastructure and services attached to this sector; and
- Ecotourism contributes to a policy of rural development that both develops the capacity of rural communities, protected areas and cultural sites and makes them equitable partners in realizing this national strategy.



C. Ecotourism Business Development

- Business development mechanisms are developed that support and nurture the needs of local, rural and small ecotourism businesses;
- A network of small business development services is established and evaluated by their clients as supportive, efficient and timely;
- Bulgarian lending institutions complement the implementation of this ecotourism strategy and develop loan programs and services that better support the small business environment in the country; and
- Specialty and niche products, which combine natural, cultural and historic resources, are developed and successfully sold on national and international markets.

D. National Policy, Management and Administration of the Strategy

- Optimized legislative base, regulatory practices, standards, and conditions for offering ecotourism products for Bulgarian and international markets is introduced and functioning;
- Mechanisms for coordinating ecotourism and cultural tourism are developed pairing NETS and CTDS, and their approval is an integral part of the National Tourism Strategy;
- The capacity and capabilities within institutions of higher education and vocational training are better prepared to serve the Bulgarian labor force engaged in ecotourism;
- A system of incentives (matching grants and loan guarantees) are developed and offered in support of regional and local ecotourism networks;
- Ecotourism marketing and promotion strategies and campaigns result in an image of Bulgaria as a cost-effective destination that offers to the European and world market a unique product based upon the unity of natural, cultural and historic heritage;
- A national steering mechanism is developed that serves the demands and needs of regional networks and local constituencies;
- Numbers of opportunities to promote and advertise Bulgaria's comparable advantage in ecotourism are increased for domestic and international markets; and
- Benefits from the development of innovative and sustainable financial mechanisms that support protected areas, cultural sites, and sustainable tourism best practices are realized.

Achieving Bulgaria's Ecotourism Mission

4.3.

Interagency Cooperation

4.3.1.

Since ecotourism and sustainable tourism are not the single domain of any one national agency or organization, the agenda for ecotourism can only be accomplished if coordinated among relevant stakeholders. Ecotourism in Bulgaria requires the coordinated efforts of the Ministry of Economy, the Ministry of Culture, the Ministry of Regional Development and Public Works, the Ministry of Agriculture and Forests, the Ministry of Environment and Waters, and many other institutions and organizations. Small groups of private entrepreneurs, local governments and NGOs should have a role in the dialogue and in national and local coordination efforts, since the backbone of ecotourism originated with them. Special attention



should be paid to interagency coordination to ensure joint action on ecotourism.

The MOE—the national agency responsible for tourism policy, strategic planning and marketing—must include ecotourism as an essential element of its overall approach to the national sustainable tourism agenda. Ecotourism must also become a major feature of the National Tourism Council (NTC). Ecotourism should be the topic of a separate working group within the NTC for an initial five-year period. After this time, its future will be determined depending upon the efficiency of its work, and its constituents' needs.

4.3.2. Competitive Cluster Approach for Strategic Planning

The Competitive Cluster Concept

Some economic sectors and subsectors are closely related. Tourism, for example, relates to agriculture, transportation, education (tourism and foreign language education and training), environmental protection, and cultural heritage preservation. This system of related sectors is referred to as a "cluster". The competitive cluster concept presumes that changes in one of the related sectors can affect the rest in one way or another. Therefore, stimulating one sector will directly stimulate and create incentives for another. One region or the whole country can obtain a competitive advantage in not only one sector but in a whole system of related sectors, and a competitive cluster is formed.

In the present NETS, the concept of competitive cluster is proposed as an approach for developing a group of economic sectors related to ecotourism regionally. Developing activities and services, organized in effective chains of ecotourism supply, provides stimuli to transportation, agriculture, food production, communal services and other sectors of local economy. They will also stimulate activities associated with cultural heritage such as preservation of cultural monuments, development of local industries and production, traditional crafts, training of personnel in this field, and the pedagogy of heritage. Thus, ecotourism could become the engine of economic prosperity for regions in Bulgaria.

The competitive cluster approach is a useful tool for achieving Bulgaria's ecotourism vision. The core element of the cluster is the comparative advantage of Bulgaria's natural and cultural attractions and its biodiversity. The competitive cluster provides opportunities for small and medium enterprises to compete at national and international levels. It can provide them with better access to information and resources and allow for flexibility and rapid adoption of innovations.

The competitive cluster model for ecotourism in Bulgaria is analyzed and developed as a set of strategic relationships that can be addressed by donors, the private sector and government in a specific program of support to ecotourism. At the center of this model are Bulgaria's natural biodiversity and cultural diversity. These are reflected in a network of protected areas, cultural sites, and regional customs. The competitive cluster is the model that guides NETS.

The competitive cluster can be used by existing groups of ecotourism providers, and can serve as a foundation for developing new ecotourism associations at the local or regional levels. The cluster is predicated on the development of partnerships and activities that include networking, training, and exchange of information, and coalitions that seek to improve infrastructure; develop policy and regulations; and work with local, regional and national governmental and legislative authorities. Technical assistance can be more effectively provided for marketing ecotourism products and linkages with reservation systems, advertising, and other national networks can be made.



Ecotourism has been recognized as a national and rural development tool. The framework from the International Year of Ecotourism and the protocols adopted by its international constituents provide a valuable guide. There are four major elements in this framework:

- Ecotourism Planning and National Policy
- Legislation and Regulation of Ecotourism
- Product Development, Marketing, and Promotion
- Monitoring the Costs and Benefits of Ecotourism

Ecotourism Planning and National Policy

Ecotourism must become more than a tool associated with protected area planning and management for this vision to be realized within Bulgaria. It must secure a recognized role within national government policy and planning at five key strategic levels: environmental, economic, regional and local government, agricultural, and cultural. Ecotourism demands integrated, multidisciplinary planning and operations to succeed. Ecotourism will require the coordination and collaboration of ministries at the national level. It will also require a level of coordination and cooperation at the regional and local government level. Strategic cooperation among partners for ensuring unified action between ecotourism, cultural tourism, and the other types of specialized tourism to achieve a synergic tourist effect in areas rich in natural and cultural heritage, is essential.

Clear mechanisms for agency cooperation need to be developed, and this will require capacity building, orientation, and skills training. Ecotourism can only be sustained if accompanied by the development of recognized national planning tools. Implementation of NETS will require the development of networks at local and regional levels, as well as mechanisms for coordinating these networks at the national level. Government policy on public-private partnerships at local and national levels must be examined, and elements that are mutually beneficial reinforced. For ecotourism to succeed it must engage local government and define its role in revenue generation, investment, taxation and infrastructure planning and development. Ecotourism success in Bulgaria must be guided by a national policy of investment and financial support focused on a scale appropriate to local government and rural people. Civic sector participation in the overall management of ecotourism and creating favorable conditions for its development should warrant special attention.

Legislation and Regulation of Ecotourism

Ecotourism must eventually be embraced in national legislation. If it is to succeed as part of national policy, laws and secondary instruments that guide its development and provide incentives for its application throughout the country must support it. Legislation and regulations must be reviewed and changed to support more integrated development of ecotourism within the National Ecological Network and in regional and local development tools. Bulgarian legislation should foster cooperation among sectors of ecotourism, cultural tourism and other types of tourism. The Monuments of Culture Act may be an appropriate vehicle for formalizing cooperative mechanisms. Ratification of the European Landscape Convention will be a valuable tool for improving Bulgaria's ecotourism policies. Ecotourism must complement other rural tourism initiatives. It must be incorporated in the mandate of local government. All aspects of the competitive cluster approach must be examined to alleviate any impediments imposed by legislation and regulation that are presently disincentives to developing sound ecotourism models and competitive clusters.



Product Development, Marketing, and Promotion

Marketing, advertising, and product development are the most important tools for successful ecotourism in Bulgaria. These activities must be implemented jointly with all stakeholders, taking advantage of contemporary media outlets, such as the Internet, to advertise and promote Bulgarian natural and cultural heritage. A certification scheme for Bulgarian ecotourism should be developed and implemented. Certification systems, standards and the extent of their application should be adapted from European and international models to fit the Bulgaria market.

The role of public-private partnerships will also be important. These partnerships need to be developed to complement the national ecotourism strategy and policy. Bulgaria will need to seek partnerships outside of the country with both large-scale tourism markets and niche market operators. Partnerships will require coordination in regional tourism markets, and local and national budgets to market and promote Bulgaria's tourism products. Everything from promotional campaigns and slogans to the packaging and marketing of ecotourism products will succeed only if public-private partnerships are formed.

Monitoring the Costs and Benefits of Ecotourism

Monitoring the implementation of NETS and the economic impact of ecotourism is important for determining if the objectives are being met and how they impact on the natural, cultural and social environment:

- (1) Biodiversity conservation advantages from ecotourism must be monitored and evaluated, both inside and outside the protected area network and specific to the National Ecological Network.
- (2) Rural development and economic growth advantages to rural communities must be monitored and evaluated, focusing particularly on those communities within the National Ecological Network, as these form a strategic network of towns and municipalities whose actions support biodiversity conservation and sustainable development.
- (3) Performance and growth of local government must be monitored in response to its role in developing ecotourism, with a focus on local government capacity, financing, and the ability to integrate ecotourism development in support of biodiversity conservation and rural economic development.
- (4) The contribution of ecotourism to the country's economy, as well as the efficiency of its relations with cultural tourism and the other specialized forms of tourism, aimed at increasing the benefits to local culture, traditions, practices and the preservation of cultural monuments in Bulgaria must be monitored and evaluated.

Relevant stakeholders should be engaged in developing monitoring indicators so the benefits of an applied monitoring and evaluation program have the best effect.

The planning process for ecotourism monitoring becomes just as important as the results, since stakeholders are invested in the program and in how results will be used.

For the purposes of this NETS, Bulgarian ecotourism stems from the Quebec Declaration for Ecotourism and also upon the *Guidelines for Activities Related to Sustainable Tourism and Biological Diversity*.

The *Guidelines'* goal is to ensure positive relations between tourism and biodiversity through the active involvement of the local communities and the private sector. Tourism development must be in compliance with the principles of preservation and sustainable use of biodiversity. In pursuit of this goal, the *Guidelines* recommend increasing the education, public awareness, and building capacity for sustainable tourism development.



Strategic Objectives and Priority Actions

5.



*Mountain Bike Tour
Rila 2003*

Jared Hardner

The NETS will embrace an approach that engages the public and private sectors from the outset. Ecotourism should be regarded as a viable type of tourism, subject to market demand and market forces. Ecotourism will be developed by building the capacity of entrepreneurs and operators working in the field to plan and manage ecotourism-related activities and facilities. Capacity building will also improve the standards of quality and operations of accommodation and other tourism facilities. This same capacity will be used to develop and maintain bookings/reservation systems, ecotourism marketing and promotion activities, and by subscribing to voluntary certification systems. This process will be based on building equity and the generation of profits.

To succeed as part of a sustainable development agenda, ecotourism must also be regarded as a strategic planning and development tool. For the public sector to understand its application and nurture its values, ecotourism also needs to be a spatial planning tool that helps define what can be done, where it can be done, and how it can be achieved. Protected area management authorities, as well as regional and local government, should begin to reap the benefits of ecotourism when they incorporate it into their development plans. Including ecotourism as a “positioning” strategy should help each of the authorities to realize benefits to conservation, local employment, local business, and destination development. Thus, Bulgaria benefits nationally and repositions itself in the regional and world market segments.

Ecotourism planning and development must have a common approach. The approach must provide an equal playing field for all who intend to engage in such enterprises, regardless of whether they are fortunate enough to operate close to a protected area or cultural site, or if they are part of other areas of high biodiversity and cultural value.



Strategic objectives for ecotourism planning and development are grouped into the four major themes of the Mission Statement, with expected results extending over the next 10 years:

- *Biodiversity Conservation and Cultural Heritage Preservation*
- *Ecotourism Business Development*
- *National Policy and Development*
- *Regional and Local Development*

5.1. Biodiversity Conservation and Cultural Heritage Preservation

Biodiversity conservation is already recognized as a legitimate part of the National Plan for Economic Development. Bulgaria's biodiversity conservation strategy is implemented through a number of mechanisms, which forms the foundation for ecotourism development. The draft Cultural Tourism Development Strategy (CTDS) identifies cultural heritage preservation as a tenet of cultural tourism. The collaboration between ecotourism and cultural tourism will stimulate the development of both and contribute to an integrated approach to conserve and preserve biodiversity, augmented by Bulgarian history, traditions, practices, and cultural monuments.

5.1.1. Develop Protected Area Management Plans (PAMPs) and Regional Plans/Strategies for Sustainable Tourism Development Corresponding to Modern Nature Conservation Concepts and Cultural Heritage Conservation Plans (CHCPs), to Create the Necessary Conditions for the Development of Ecotourism and its Links with Cultural Tourism

The terms of reference for the management plans should examine ecotourism and cultural tourism development inside and outside protected areas, and include the following elements:

- An inventory and assessment of appropriate opportunities for development of ecotourism inside and outside a protected area (PA) and Cultural Monument (CM) and within at least a 20 km radius of each area;
- Zones within PAs and CMs, in which ecotourism areas are prioritized based on an assessment of potential human impacts;
- Full participation of local communities, cultural heritage preservation groups, and local/regional government;
- Financial assessment of the initial investment needed for maintaining sites;
- Monitoring plans and periodic reviews of PAs, CMs, and ecotourism development activities; and
- Announcement of new PAs and CMS, and development of appropriate management plans.

5.1.2. Provide Assurances that PAMPs and CHCPs Mitigate Environmental Impacts Associated with Ecotourism, and Operate within the Limits of Acceptable Use and Acceptable Change

Protected areas and natural and cultural landmarks must be protected from negative human impact associated with different forms of tourism, including ecotourism. When measuring impacts and establishing limits of acceptable use and change, protected area and cultural site managers must err on the side of conservation. The failure to do so can result in expensive restoration programs and/or the loss of heritage and biodiversity. Therefore, protected area and site managers will work with others to:



- Develop a national system for the enjoyment and use of resources and sites that respects and sets limits on use and change.
- Develop mechanisms that effectively enforce the management system.
- Identify threats to biodiversity and cultural and historical heritage sites and apply measures for mitigating those threats.
- Identify indicators and monitor changes in biodiversity, and cultural and historical heritage.
- Apply official systems, standards and rules for the conservation of natural resources (species, localities, habitats, landscapes) and cultural and historical heritage sites in the regions of high conservation value, both inside and outside the protected area network.
- Develop and use special training programs on assessing acceptable change, and improving the skills and responsibilities of PA administrators, heritage site managers, representatives of the private sector in the area of ecotourism, associations and local government.

It will be difficult to define limits of acceptable use and acceptable change. Natural areas have extremely different levels of tolerance and resilience. This has been seen time and again throughout Bulgarian history. Cultural sites have even less tolerance. Each site or ecotourism area will need to have its own standards that must be monitored. However, national standards or guidelines should be developed to direct these localized efforts. These should form a part of protected natural areas and cultural site management policy, as well as associated regional development policies.

The role of PAMPs and CHCPs in coordinating activities of institutions should be outlined. It is essential that the limits of acceptable intervention on cultural and historic heritage be defined in the CHCPs, to avoid negative impacts of tourism on the sites. Ecotourism uses natural and cultural/historical areas and should comply with all requirements for preserving the authenticity of cultural and historical values. Local authorities and protected area managers must closely coordinate with relevant central state institutions, including the Ministry of Culture and the National Institute of Monuments of Culture, as well as with local specialized bodies within the system for preservation of cultural heritage.

Ensure that Revenue Generation for Biodiversity and Cultural Conservation is Clearly Provided for in Central Planning Mechanisms, and Includes Voluntary Visitor Contributions, Contracts, Taxes and Concessions

5.1.3.

There are a number of practical mechanisms under development in Bulgaria to support protected area conservation and ecotourism development. Many have the potential to financially benefit protected areas, cultural sites, and ecotourism entrepreneurs. Provisions to develop these mutually beneficial arrangements are still in their infancy and need to be further analyzed and improved. There is a need to:

- Continue to reform national legislation to ensure a direct relationship between the right to carry out ecological and cultural tourism activities and the responsibilities for the conservation and maintenance of resources and sites of natural and cultural importance.
- Develop and legalize beneficial financial mechanisms that promote the primary objectives of sustainable development and nature conservation. Consider protected area and ecotourism financial mechanism models from other countries that employ the use of limited period concessions or commercial contracts.



- Develop model contracts that serve to guide concession relationships, and establish their duration and operating procedures.
- Assign the revenues generated from these contracts to benefit the objectives of nature conservation, cultural preservation and local economic growth.
- Support the establishment of a Protected Areas Fund (PAF) to ensure ongoing financial support for capital improvements and operating projects associated with a system of protected areas in the country. The PAF would support capital investments, park and other protected area development projects, infrastructure, cultural sites, and provide ecotourism development grants to communities that work in close proximity to protected areas.
- Assign central and municipal cultural funds, envisaged in the Law on Protection and Development of Culture, to support initiatives aimed at conserving and using cultural heritage for ecotourism and cultural tourism.

5.1.4. Develop Inventories of Sustainable Agriculture, Cultural, and Historical Resources in Concert with National Ecological Network (NEN) Sites

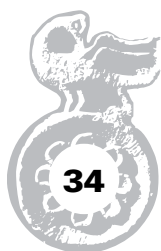
These inventories are a prerequisite for developing a competitive national ecotourism product. To link these three evolving networks the following is appropriate:

- Use the NEN as a guide for identifying and assessing sustainable agricultural resources for a national ecotourism network and implement the priorities set in national and international legislation.
- Develop and build a national network of cultural itineraries and include a database of all major cultural and historical heritage sites, and cultural events as envisaged in the Strategy for Development of Cultural Tourism. Integrate these with a national ecotourism network and the European Network of Cultural Itineraries.
- Develop ecotourism networks in compliance with existing national and international legislation.
- Identify the human capacity and human resource networks that support the NEN.
- Develop and maintain a database to serve as the basis for a Geographic Information System (GIS), linking these elements at national and regional levels.

5.1.5. Support Sustainable Agriculture and Forestry, and Species and Habitat Restoration Activities that can also Serve as Ecotourism Opportunities

A number of agricultural and forestry practices in ecotourism regions need to be sustainably developed. Sustainable practices should be promoted as an incentive for collaboration between the private sector, ecotourism business, and agricultural and forestry businesses on conservation of species and habitats and cultural conservation. Necessary measures include:

- Providing incentives and investment opportunities for those businesses and local communities that develop new conservation areas within priority biodiversity areas outside of the protected area system;
- Providing incentives and investment opportunities for rural communities and businesses that retain and adopt sustainable agriculture practices, organic production systems, and the restoration of native species and cultivars;
- Providing incentives and investments for appropriate environmental management systems;



- Providing subsidies and support for businesses and communities that take responsibility for cultural conservation; and
- Assisting the promotion of best production practices and effective operational models in Bulgaria between local and regional entities.

Develop and Implement Volunteer Programs that Support Biodiversity Conservation, Cultural Preservation, Sustainable Land Use Systems, and Ecotourism Development

5.1.6.

Historically, voluntary efforts have been the basis of nature and culture tourism in Bulgaria. Excellent examples include the establishment of the Bulgarian Tourism Union (BTU) and the *Chitalishte*. Unfortunately, many voluntary efforts that link communities and volunteers to conservation, sustainable agriculture, cultural heritage and ecotourism programs have ceased, or are failing. Some attempts to revive these activities have been made by national and local NGOs and supported by donors. These are largely isolated and independent of central government support and recognition. In addition, there have been few efforts to link these voluntary organizations and their efforts to the private sector, particularly to ecotourism activities. It is necessary to:

- Establish a national volunteer ecotourism network around the themes of biodiversity conservation, culture, and sustainable agriculture. This would promote the regular exchange of information and experiences, and direct and guide volunteer activities in the country.
- Coordinate activities of the national volunteer ecotourism network with networks of volunteer organizations for cultural heritage conservation, in the spirit of the Declaration of the Council of Europe (2001) on the role of volunteer organizations in the area of cultural heritage.
- Promote good practices in Bulgaria, citing how volunteer efforts have benefited the public.
- Develop schemes for theoretical and practical training of volunteers as guides, and interpreters.
- Offer practical field training in ecotourism for students in educational institutions as an alternative or supplementary training to existing field-training programs (in hotels, restaurants, and travel agents service). The activity should be linked with various forms of pedagogy of heritage promoted by the Council of Europe, particularly with European classes in exploring natural and cultural heritage.

Ecotourism Business Development

5.2.

In addition to being a tool for protected area management, biodiversity conservation and cultural sites management, ecotourism is also an income-generating tool. Sustained income generation requires business acumen and skills development. The elements of successful business development should be evaluated and applied to ecotourism development.

Develop Clusters or Networks of Core Ecotourism and Supply Chain Businesses at the International, National, Regional and Local Levels

5.2.1.

Scattered ecotourism initiatives in the country could benefit from the exchange of information and cost savings associated with a national network of ecotourism providers. The scale of such a network is hard to determine at the present time and should evolve from a model that demonstrates the advantages to network subscribers. Ecotourism clusters or networks could start within key regions of the country, growing into a national system. In order to advance this idea, it is important to:



- Establish relationships between national specialized tourism associations, leading travel agencies, and regional and local tourism information centers.
- Integrate and unify available databases in the regions, which have been compiled at different time periods with different standards and criteria, and include them in an integrated national informational network.
- Develop a clear network charter that is supported by periodic meetings, annual exhibits and forums.
- Develop information networks that can demonstrate advantages to their subscribers and result in better business development.
- Identify clusters by products or regions and attract them into a cluster to facilitate contacts and relationships, and to establish joint programs for developing a marketing strategy and a means of funding the product and/or region.
- Involve conventional tourism businesses in ecotourism initiatives.
- Develop outreach programs to international and regional special interest groups: caving, hiking, rock climbing, botany, birding, and craft specialties, among others.
- Develop a series of ecotourism and cultural tourism products and networks centered on a combination of biodiversity conservation, cultural and historic heritage preservation, sustainable agriculture, and cultural heritage found in the NEN and the National Cultural Routes Network.

5.2.2.

Improve the Entrepreneurial Capacity of Businesses and Train Local Communities Providing Ecotourism Services

Most local communities that have potential for offering and benefiting from ecotourism do not have the requisite skills and experience to provide ecotourism products and services to their clients. At a certain stage, small, rural communities are able to realize the advantages of ecotourism as an income-generating and municipal development tool, but they lack the necessary means and skills to realize success. Thus, these communities require small and micro-business development assistance to develop entrepreneurial capacities. Such an approach requires:

- Business orientation seminars – e.g., an introduction to the supply and demand of ecotourism;
- Programs for raising public awareness on ecotourism issues such as the Eco-Host program developed in British Columbia, Canada;
- An awards program for the best national and regional practices and best investment by entrepreneurs in the field of ecotourism;
- Business training provided within the national educational system (vocational schools, colleges and universities) in developing products, marketing, small business operation, business planning and credit applications;
- Nature and cultural heritage interpretation programs and training programs for guides;
- An exchange of visits at national, regional and international levels for sharing experience and studying successful practices in the field;
- Developing specialized ecotourism vocational training programs on current tourism specialties for secondary schools; and
- Developing specialized training courses for entrepreneurs in ecotourism that would become part of training programs provided by academic institutions, business centers and development agencies.



Expand Access to Financing Mechanisms, Equity Investments and Other Funding Resources

5.2.3.

Conditions for investing in, and financing ecotourism in Bulgaria are relatively undeveloped and unfavorable. The scale and costs related to most rural ecotourism products and services are not sufficiently large enough to attract much commercial banking support. The scale and location of many of these business development efforts are varied, and represent no logistical and administrative advantages to a commercial bank if they were interested. However, investments in a great number of small-size projects in key target areas, rather than in large-scale individual projects, are needed to develop rural ecotourism. The following mechanisms are seen as appropriate for advancing ecotourism models that benefit the goals of nature conservation, cultural preservation, small business development, and improvement in rural communities' economic growth:

- Capitalize on the National Trust Eco Fund and PAF to channel donor and government support to this evolving sector. Use state and donor contributions, and private and foreign donors, to “grow” this investment fund for ecotourism financing. Direct as well as matching grants can be provided to key ecotourism investment areas and/or projects. The Bulgarian government must play a decisive role in nurturing this funding mechanism by committing financial resources and attracting other donors.
- Allow the municipally generated funds from the tourism tax to be used as matching funds for ecotourism development. Municipalities who successfully generate funds from this tax should be rewarded with matching grants from donor and government sources. Matching and/or challenge grants can also be tools for attracting private capital, and should operate at a scale that can be absorbed at local community levels.
- Commercial banks should be encouraged to administer and service ecotourism loans at a manageable scale by most rural ecotourism development businesses. Their risk should be lowered with credit guarantees from the government and donor credit authorities. These services can be linked to a tailor-made business consulting and services network developed to serve ecotourism development.
- Leverage large-scale private sector investments. The trend to diversify private sector tourism offerings in the country is growing in response to client demand. Large-scale tourism operators are looking to diversify their products for clients, and ecotourism is increasingly a focus of their interest. In areas rich in natural, cultural and historic heritage, the clients' interests are additionally stimulated. Diversification of Bulgaria's mass tourism product could readily include ecotourism. Correspondingly, a large-scale, private sector, ecotourism investment program should be directed and brokered through local and regional ecotourism associations. Large-scale investment programs in the private sector should include various forms of management through local or regional tourism associations.
- Investigate and develop voluntary private contributions for ecotourism development and nature conservation, cultural tourism development, and cultural and historic heritage preservation, through willing international and national private sector parties. Many private businesses and large hotels are employing a policy of adding a token voluntary contribution for nature conservation and/or ecotourism to a customer's bills. In other instances, corporate policies are evolving where a small contribution is made from each sale or service to an ecotourism development or nature conservation fund. These are most common in international hotel chains and linked to overnight and/or laundry services. These “green” or conservation funds are progressively becoming part of an international corporate policy



- and image, as well as a growing source of revenue to community and conservation activities.
- Apply a “polluter pays” analogy for big investments in mass tourism. In cases of large tourism investments that compromise biodiversity or add an additional burden to the environment, a system obliging the investor to provide an environmental or biodiversity fee that benefits nature conservation and/or ecotourism development should be considered.
 - Solicit governmental and external donors’ support, and of other international financial institutions, to submit special credit lines (terms) for tourism businesses providing favorable interest rates and other attractive terms to Bulgarian banks.
 - The support to SME funding could be enlarged and improved by establishing (an internationally supported) National Warranty Fund (NWF) for SMEs and developing a concept note for Regional Warranty Funds, as well as microfunding schemes, grant schemes for promoting new SMEs, and other similar initiatives at the regional level.

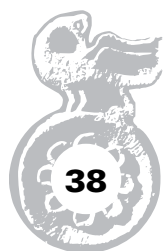
5.2.4. Facilitate the Development of Effective Small and Medium Ecotourism Enterprises

Small and medium enterprises play a key role in sustainable development. SMEs help meet sustainable development objectives by generating and keeping income and economic benefits closer to home. They are more flexible and readily tailored to provide tourists with extra care or customized services. Their operations are often more in tune with community needs, and their offerings more sensitive to local traditions and experience. A more considered small enterprise approach to ecotourism than the one that presently characterizes Bulgarian small tourism enterprises would:

- Introduce integrated consultative and business development “agencies” linked to key ecotourism regions, with assistance from Bulgaria’s Agency for Small and Medium Enterprises and the UNDP Business Incubators and Business Centers Programs. These agencies should be a one-stop shop or “one-counter service” for ecotourism development.
- Use the consultative services provided by various EU programs and projects and other donors.
- Develop projects in cooperation with Bulgaria’s Agency for Small and Medium Enterprises to take advantage of funds allocated for improving small enterprise effectiveness.
- Develop a package of overall incentives and opportunities designed to support the character, scope and scale of ecotourism enterprises, including financial and other incentives for SMEs, such as grace periods for repayment, tax allowances, and subsidized credits

5.2.5. Focus Ecotourism Development on Domestic Markets as an Initial Priority and then Expand to Targeted International Market Segments

In the short term, efforts to market and develop ecotourism products and services should be targeted at the Bulgarian market. Surveys indicate that this market could be substantial, and can be an effective stepping stone to reach international markets. Additional market research should target group-oriented travel and ecotourism-related questions should be included in the Ministry of Economy tourism exit surveys. Ecotourism service providers should be trained and assisted to assess and monitor customer satisfaction, and to further develop and improve their products.



The Bulgarian ecotourism market is relatively diverse. With a growing national income level, associated mostly with the urban areas, there is an expanding market for urban dwellers to enjoy ecotourism products year-round for short periods. There is also a demand for longer, tailored programs during the summer months. More effort is needed to understand the needs and demands of this market segment and how these can be incorporated in the ecotourism products. Focusing on the younger generation in Bulgaria appears to be a timely and workable starting point, since children and youth markets appear to be the most readily adaptable to ecotourism products. This market segment is fairly responsive to ecotourism themes and products. This market is less demanding and quick to grasp new ideas. Partnerships between ecotourism service providers and local sports clubs could provide tailored programs directed at this market segment.

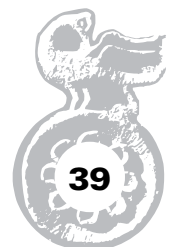
Regional trip circuits within Bulgaria should be developed. As Bulgaria's ecotourism experience grows, transnational eco-itineraries should be developed to link Bulgaria with neighboring countries. National associations (BATA, BAAT, BARET, and BTU), local and regional ecotourism associations, and other interested parties should work with the MOE and the Executive Tourism Agency to develop a national ecotourism marketing strategy. Integrating ecotourism niche markets into the MOE international marketing strategy, using international communications and the Internet, and actively participating in major travel market expositions should expand this cooperative effort. Recognized leaders in the international tourism field might then support familiarity trips to Bulgaria.

Formulate National Guidelines for a Visitors' Ecotourism and Cultural Tourism Interpretation and Education Program

5.2.6.

There are no national guidelines for tourist interpretation and education in Bulgaria's protected area system, surrounding areas or other attractive natural areas that promote the messages of biodiversity conservation, ecotourism, and cultural heritage. At present, each effort is often unique and does not always accomplish its original intent. Many areas fail to offer tourists anything at all, and still other interpretation and informational efforts fail to identify their target groups. In many instances, materials and programs can be too general to be useful, or too technical to be appreciated widely. In order to strengthen this field of interpretation and education, it is necessary to:

- Develop successful interpretation prototypes/examples through specialized capacity-building programs, infrastructure, printed materials, signs, site interpretative materials, pre- and post-visit programs, and similar activities that can be used to guide interpretation and education efforts linked to biodiversity conservation, cultural conservation, and adjacent support/buffer zones.
- Develop the expertise and appropriate support within national and local departments, protected area staff and NGOs to promote these models.
- Develop programs, curricula and specific training courses.
- Integrate the development of infrastructure for ecotourism and cultural tourism with area-specific interpretation and education programs.
- Develop a certified ecotourism guide program that expands the traditional functions of mountain and tour guides, and develops a cadre of skilled interpretation professionals operating at local and national levels.



5.2.7.

Establish a Program for Ecotourism Awareness and Capacity Building for Tourism Businesses and Government Officials

Nature protection, protected areas, cultural site managers, and local government are faced with presenting ecotourism opportunities to representatives of small- and large-scale businesses. In order to afford communities and entrepreneurs a focused orientation to these opportunities, specialized programs need to be developed and implemented. Orientation efforts should concentrate on:

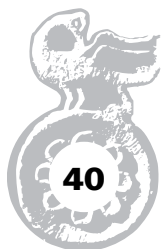
- Using existing models and practitioners, including exchange visits and best practices shared between successful communities and emerging ecotourism communities;
- Coordinating the development of these programs using national- and regional-level interdisciplinary working groups;
- Subsidizing the organization and offering of these orientation programs through a special fund related to regional planning and development;
- Using these programs to assess and promote the preparedness of regional entrepreneurs and local government to respond to ecotourism as business and rural development opportunities;
- Including these projects in the Sixth Frame Program of the EU for Technological Development, Research and Demonstration, to increase public knowledge on ecotourism and bring Bulgarian companies closer to EU requirements, and to support the research needed for developing ecotourism products; and
- Supporting the introduction of international standards for quality management to guarantee product quality. Encourage projects for environmentally sound production (ISO 14000), best production and laboratory practices (GMP and GLP), as well as implementation of international standards for management of quality as per ISO 9001:2000.

5.2.8.

Develop a Private Voluntary System for Ecotourism Product Certification

There are two main reasons for ecotourism destinations and businesses to get involved in certification and environmental management programs. First, marketing green certification has been successful in attracting customers and increasing profits. People are choosing locations and accommodations and other business relationships based on the green certification. Second, an environmental management system (EMS) is an essential part of tourist management in key biodiversity areas. Biodiversity conservation, communities, and the nation benefit from energy savings, effective waste management systems, and more environmental/landscape-friendly infrastructure design. The development of a certification system can help to:

- Develop stronger relations with other European and international certification programs.
- Promote best practices through exchange visits and exchange of information.
- Generate interest in participating in regional and international forums to promote EMS standards.
- Develop a voluntary certification and accreditation scheme in concert with regional development and promotion of private sector ecotourism.
- Identify tangible incentives and benefits stemming from voluntary certification.
- Nurture and support national agencies and associations in their role as advisors and monitors of applied certification standards.



- Utilize external third party bodies to review and validate certification actions.
- Compare achievements with other member countries in the European Charter for Small Enterprises.
- Establish a working group to develop a concept paper on certification of ecotourist products, focusing initially on existing, registered trademarks and emblems of the three national parks in Bulgaria.

National Policy and Management

5.3.

Encourage Policy Coordination and Cooperation between Key Government Institutions to Formulate and Implement NETS

5.3.1.

Establishing ecotourism as a major component of tourism and rural development in Bulgaria, and integrating it with cultural tourism, requires effective coordination among key state institutions and their regional directorates. These include the MOEW, the MOE, the MOAF, the MOC, the Ministry of Regional Development and Public Works, the Ministry of Education, and the Ministry of Labor and Social Policy, or their successors. Preliminary coordination has been established through a Protocol Agreement among three of these ministries, but this coordination needs to be expanded over time. Several mechanisms are important to regular and consistent coordination of ecotourism in the country:

- Develop a national coordination mechanism that focuses on ecotourism development and will contribute to finalizing and implementing NETS.
- Place the National Ecotourism Working Group (NEW Group) within the National Tourism Council (NTC) to ensure ecotourism is appropriately addressed as a national economic development tool.
- Specify the mechanism for coordinating the completion and implementation of NETS at the regional level.
- Identify and incorporate tourism and other and nongovernmental associations and private sector participants to assist in the completion and implementation of NETS.
- Develop terms of reference and operating procedures for the NEW Group.
- Identify a financing mechanism for the national ecotourism coordination mechanism and develop a timeline.
- Define the role ecotourism will play in the national development plan and in regional development plans.

It is important to immediately institutionalize the NEW Group as a permanent unit of government to address the following objectives:

- Coordinate the review, revision and adoption of NETS at the national, regional and local levels.
- Coordinate the implementation of the action plan with those responsible for mobilizing the necessary institutions, funding and resources.

Develop Bulgaria's Image as One of Leadership and as a Model for Ecotourism in the Balkans and in Europe

5.3.2.

Effective marketing and promotion are critical for establishing Bulgaria's ecotourism products on the international map (as well as within Bulgaria). Without a long-term national marketing strategy, it will be difficult to maintain this sector and produce sustainable benefits to nature conservation and the local population. Steps to be taken include:



- Creating a uniform national ecotourism identity with specific Bulgarian dimensions and using this image to make consistent ecotourism information presentations. This effort would help to create a national image and give Bulgaria a European and international ecotourism identity.
- Improving country maps and developing new guide books and multimedia information systems focused on the variety and diversity of Bulgaria's ecotourism attractions.
- Highlighting ecotourism sites, products and their links to Bulgaria's national biodiversity and cultural heritage on MOE, MOEW, and MOC websites and communication networks. Links to other relevant websites in Bulgaria and abroad should be included.

Bulgaria operates from a relative geographic advantage in the Balkan region. As a stable republic with a growing international tourism market share, improved infrastructure and increasingly efficient communication systems, Bulgaria has the opportunity to become a regional leader in the field of ecotourism. The advantages in the Balkans and in Europe are its:

- Geographical position at the crossroads of two continents,
- Distinct bio-ecological zones,
- Unique cultural heritage that is a significant part of the Pan-European heritage, and
- Position as an accession member to the EU with the largest intact ecosystems in Europe.

To develop and support this image, the following elements should be considered:

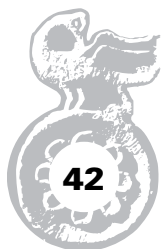
- Large-scale support by the government and private sector for advertising Bulgaria's natural and cultural heritage;
- Support for promotional visits and twinning arrangements with other ecotourism efforts in the region;
- Private sector links with international partners that could be nurtured and supported;
- Subsidies and support for Bulgarian participation and promotion in European ecotourism networks and the European cultural trails network; and
- Involvement on the part of Bulgarian trade and diplomatic offices abroad in the promotion and popularization of tourism and ecotourism in Bulgaria.

5.3.3.

Review and Revise National Legislation and Regulations to Promote Ecotourism Development

A comprehensive review of national legislation needs to be conducted to identify those regulations that run counter to developing and promoting ecotourism. This review is best achieved by a subcomponent of the NEW Group. The review should consider the experiences of other countries as they implemented decentralized governance policies, especially those that support ecotourism development. Emphasis should be placed on the need to ratify the European Landscape Convention.

Legislation needs to be synchronized—a Tourism Act, Local Government and Local Administration Act, Budget Act, Regional Development Act, Regional Regulation Act etc.



Analyze the Influence of the EU Accession Process on Ecotourism Planning, Development and Funding Policies

5.3.4.

European Union regulations are highly committed to environmental and rural development issues. The Bulgarian process of ecotourism development must be critically reviewed as it attempts to establish common ground with European regulations. A legal analysis of ecotourism development in Bulgaria should include an assessment of EU regulations and programs promoting ecotourism. The assessment and its results should be coordinated with the responsibilities and schedule of Bulgaria's Chief Negotiator to the EU and the Ministry of EU Accession.

Adopt a System to Monitor the Implementation of NETS, Including the Successes and Failures of Ecotourism

5.3.5.

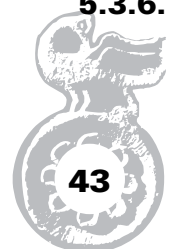
An impact monitoring system needs to be developed to measure the success of NETS and its impacts at local and regional levels. To realize greater efficiency of NETS in Bulgaria, the following key questions should be considered in developing the monitoring system:

- To what degree does ecotourism contribute to the protection and management value of natural areas, cultural sites, cultural communities, and of a specific natural area?
- What are the impacts of ecotourism in natural areas and on sites of cultural importance and significance?
- Are there any initiatives for managing ecotourism impacts in the buffer zones and those zones affected by ecotourism development?
- What is the capacity of local authorities to implement these initiatives?
- What is the impact of tourism on biodiversity and on cultural and historic heritage?
- What is the impact of ecotourism on the government's development of policies to support sustainable development of tourism?
- Is ecotourism contributing to a better understanding of the environment and an improved social situation in the tourism destination/area?
- Is ecotourism contributing to expanding local businesses and opportunities for income?
- Do ecotourism activities and job opportunities reach new segments of local communities?
- Are collective benefits to the local community increasing?
- What are the social and cultural impacts of ecotourism activities?
- Has ecotourism development improved local access to information, increased technical knowledge and stimulated greater involvement of local communities?
- To what degree do cultural and historical heritage contribute to development of ecotourism in integral areas rich in natural and cultural values?
- What is the relationship of ecotourism to cultural tourism and what is the effect of their joint action?

Plan and Build Appropriate Infrastructure to Improve Access to Ecotourism Opportunities

5.3.6.

If Bulgaria is to successfully promote its ecotourism products to domestic and international markets, it must improve its communication and access infrastructure. Such efforts should include:



- A national standard for directional road signs to natural and cultural attractions and their location—this is a requirement for EU accession;
- Attraction of resources through international programs to ensure access to priority tourism destination—building and maintaining third and fourth-class roads within the national road network leading to priority ecotourism sites;
- Infrastructure development in conjunction with parks, cultural sites, and local ecotourism development to include trail development, new tourism infrastructure, signs, shelters, benches, observation points, fireplaces, camping places and barriers;
- Adoption of safety standards and compliance measures; and
- Provision of modern phone and Internet services to key areas and remote communities.

5.3.7.

Apply Information Technologies (IT) and Geographic Information Systems (GIS) to Ecotourism Planning, Development, and Marketing Activities

GIS should be perceived as a technology for input, maintenance and manipulation of diverse georeferenced data, allowing integration of databases and graphical data; performance of spatial analysis and modeling; and visualization at each level of analysis, thus facilitating the decision-making process. Ecotourism, like any other land-based activity, needs to be spatially planned and coordinated. GIS is a valuable tool in guiding informed decision making in ecotourism planning, development and marketing.

Using GIS technology for linking regional planning with ecotourism development will make the process faster, consistent and more effective. Priority directions to apply IT and GIS in ecotourism include developing a tourist resource inventory; identifying suitable ecotourist locations; optimizing tourist flow management; and monitoring and analyzing potential impacts that result from ecotourism development. GIS applications in ecotourism may also build the basis of regional and national reservation networks as well as visualizing and modeling objects and processes for marketing purposes.

GIS is a useful tool both in biodiversity conservation as well as in the inventory and management of cultural monuments and sites. It will be key to the development, maintenance and administration of NEN, and to link ecotourism with the development of the NEN. GIS can also facilitate the development of national cultural itineraries networks and databases of cultural and historical sites of conservation value. Currently an overview of the present situation is needed to review potential impacts of ecotourism and to set up monitoring systems for its impacts on the cultural and natural assets.

A national information system (NIS) should be designed and built to assist planning and implementation of the NETS programs. It should be based on systematic, situational analysis, and linked to other available information systems in this field, including those with Internet-based modules. Prerequisites for this system are to regulate the process of data exchange, define user groups and their rights, and comply with all legal requirements. An information system on a national scale will serve diverse user groups—those who update, maintain, and operate the NIS itself; and those involved in direct application of NIS data, such as those looking for models or information concerning site identification or the distribution and development of tourist trails, etc.

A strategic objective of NETS is to create conditions that will increase the capacity and knowledge of personnel involved in tourism and environmental protection to work with contemporary information technologies and GIS. On this basis, implementing GIS technology at



all levels of planning, management, marketing and monitoring as a universal tool will ensure support to the decision-making process. Spatial planning and the use of IT and GIS will become increasingly important as Bulgaria seeks to develop its rural areas and ecotourism.

Develop Cross-Border and Transboundary Cooperation on Ecotourism and Nature Conservation

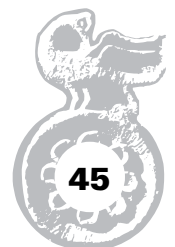
5.3.8.

The scope and advantages of cross-border and transboundary cultural heritage and nature conservation, and cooperation in the field of ecotourism and cultural tourism, are now being explored internationally. Networks can be developed/expanded and used to coordinate national and regional ecotourism policies in areas rich in natural and cultural heritage.

National and regional links (National Network of Cultural Itineraries and Cultural Itineraries of Southeast Europe) to existing European cultural networks include the Silk Route, the Wine Route, and Balkan Architecture Centers. These networks are promoted via guidebooks, maps, and online route planning facilities. In addition, common signs and logos develop a common market presence across the full breath of the network.

Observations and recommendations made by participants at Bulgaria's National Forum on Ecotourism, Mountains and Protected Areas indicate that regional and transborder linkages could be facilitated by:

- Using World Heritage Sites as anchor attractions linked to other protected areas and local communities;
- Linking popular sites to those less visited sites;
- Forming links to outlying sites that are not necessarily protected area sites;
- Coordinating with tour operators and site managers at protected area sites to create trip circuits and tour itineraries;
- Improving the interpretative materials for tourists by linking several sites with stories describing their natural and cultural heritage, enhancing the visitors' experience and quality of the tour;
- Standardizing logos, signs and other information aids in the region;
- Creating networks of tourist and information centers;
- Developing routes based on physical/geographical/cultural authenticity (e.g., Crusaders Route), and presenting them virtually, unifying elements in different countries by themes; and
- Fostering transborder cooperation by developing the Balkan Green Belt, an integrated system of large transboundary protected areas in the Balkan countries. Examples include:
 - Strandja Nature Park with Turkey,
 - Danube river and wetlands with Romania,
 - Future Western Stara Planina Nature Park with the Serbia and Montenegro Alliance,
 - Ossogovo and Belassitsa Nature Parks with Macedonia,
 - Rhodopes and Slavianka with Greece, and
 - The trilateral Belassitsa Mountain area with Greece and Macedonia.



5.4. Regional and Local Development

5.4.1. Adopt a Strategic Regional Network Approach to Ecotourism Development

The success of ecotourism at the regional and local levels largely depends upon applying an approach for using all the existing resources, organizing structures and links between them, and establishing and developing cooperation networks.

A strategic regional approach to ecotourism development is an important means to address the challenges of sustainable development. This approach:

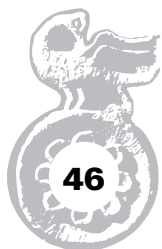
- Nurtures decentralization;
- Supports local government models;
- Links taxation with local accrual of benefits;
- Fosters regional business associations;
- Attracts business investment;
- Supports the association of municipalities aiming at international marketing;
- Encourages association of stakeholders through various nationally funded activities; and
- Guarantees the long-term preservation of the interest of local businesses and public in the sector and the conservation of natural, human and other resources.

Regional networks could become the basis for ecotourism promotion and marketing, using information hubs linked to visitor centers at major tourism destinations and at protected area gateways. Examples of existing regional networks for tourism development in Bulgaria include the regional tourism councils, local ecotourism associations, and information centers. Prospective regional ecotourism destinations should be identified to maximize these networks.

5.4.2. Stimulate and Nurture Existing Local and Regional Ecotourism Models and Best Practices

Tour operator and tourism information center networks should remain one of the main cornerstones for regional ecotourism development. Regional and local ecotourism and tourism associations and committees could nurture these networks, and realize tremendous savings in time and investment. The model projects developed at MOEW and MOAF protected area sites could be used to orient and train other protected area/gateway communities on how best to determine their readiness to receive tourists and to take steps to improve their capacity. The following support should be provided to local and regional tourism or ecotourism associations:

- Requiring and developing orientation and training programs on nature conservation and environmental protection as a precondition for ecotourism development, and on ecotourism themes that can be used as models;
- Setting up product-oriented associations to decrease marketing and advertising costs;
- Multiplying 'best practices' experiences;
- Introducing one-counter services as an instrument for expedient and simplified procedures of public services;
- Attracting/appointing tourism specialists in municipalities ready for extensive tourism/ecotourism development;



- Using university capacity for research and information collection as well as submitting information on academic institutions to national and regional organizations;
- Establishing centers or focal points of business expertise and support, including train-the-trainer programs focused on business planning, risk analysis, financial analysis, and entrepreneurship;
- Expanding destination management capacity, including land use planning and zoning, multistakeholder collaboration, and cooperative marketing;
- Developing regional ecotourism marketing programs;
- Creating Internet and visitor center reservation and booking systems;
- Developing a regional database of ecotourism goods and services;
- Participating in other regional, national, and international marketplaces and fairs to promote products and exchange ideas;
- Expanding relationships with regional government, local government, and protected area managers; and
- Supporting study exchanges focused on successful community ecotourism efforts and best practices.

Support Local Participation in the Planning Process to Identify Community-based Opportunities Associated with Protected Areas, Biodiversity Conservation, and Cultural Attractions

5.4.3.

The success of ecotourism and its ability to serve the income generation needs of rural communities will depend on a decentralized implementation of NETS. It will also depend on more focused, local engagement in protected areas and biodiversity planning, as well as other rural and cultural development efforts. Local participation is best supported by:

- Identifying the most appropriate process to engage local communities in local area planning either for protected areas or for exceptional natural features, or areas within the NEN;
- Ensuring that the collaborative process becomes part of procurement procedures to ensure an open and transparent process;
- Engaging local communities in assessing ecotourism opportunities long before final public hearings on any plans;
- Involving local communities in activities related to conservation; promoting and using cultural heritage sites; developing local culture; and planning for cultural tourism including specific participation by local museums, galleries, day centers, and NGOs;
- Involving local entrepreneurs and interested parties in the collection and analysis of ecotourism planning information; and
- Preparing appropriate (easy-to-use, step-by-step, practice-oriented) manuals, handbooks etc. with the support of local authorities.

Integrate Ecotourism in Regional Development Plans

5.4.4.

Ecotourism objectives should be integrated into regional and local plans for economic development under the procedures of the National Rural Development Plan process. Community collaboration forums and related approaches should be used, encouraging the local community to become the initiator of ecotourism opportunities and development. Tourism, including ecotourism, should be integral parts of these plans and endorsed by the regional and local authorities and the government, thus becoming part of the official policy.



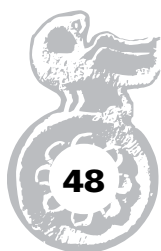
Recommendations:

- The planning documentation should include use of ecotourism resources as part of the costs for conservation and management of the region, marketing and promotion; and on the revenue side—taxes and fees derived from ecotourist enterprises can create new jobs and increase revenue.
- Planning documentation should also be interrelated both with municipal development plans and regional regulation plans at the municipal level, and with planning documentation at regional and national levels.
- Regional regulation plans constitute the basis for management and decision-making processes. The strategy at a certain level (national, regional, local), the local and regional plans and strategies for cultural tourism and other forms of sustainable tourism should be linked to current regulation schemes and plans.
- The following principles should guide planning documentation:
 - including tourism only after the municipality or larger region properly evaluate and commit to its development;
 - assessing costs and benefits derived from tourist and ecotourism development while preparing strategic and program documentation; and integrating principles, recommendations and
 - activities envisaged in NETS in other planning documentation. These would necessitate the consideration of potential conflicts with other objectives and spheres and selection of the best possible alternative; methodical guidelines for working out planning documents should provide for inclusion of *section tourism* in identifying their scope, whereas ecotourism issues will be considered if appropriate, but not in all cases.
- Municipalities geared to extensive tourism development should have tourism specialist/s on staff, whereas ecotourism commissions or subcommissions will be established by municipal councils.

5.4.5.

Replicate the Use of Ecotourism Related Forums, Events and Celebrations Throughout Regions in Bulgaria

Ecotourism forums, fairs and similar events should be regularly used in Bulgaria's regions and local areas. These events should include activities designed to promote more effective communication and coordination with Bulgarian government and donor programs, decentralized governance, municipal capacity building, and infrastructure development.





II.

NATIONAL ECOTOURISM ACTION PLAN (NETAP)

NATIONAL ECOTOURISM STRATEGY AND ACTION PLAN

Photo credits on the previous page

- Horseback riding in Eco-park Varna ♦ Danail Pavlov
 - Traditional table ♦ RTA "Rhodopes" Archives
 - House - Karlanovo village ♦ "Pirin Tourism Forum" Archives
 - Copper with flowers ♦ "Pirin Tourism Forum" Archives
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The Action Planning Process

1.



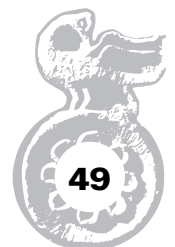
*Action Planning
in Kalofer,
Central Balkan -
South*

*Ecotourism
Association
"Central Balkan -
Kalofer" Archives*

The National Ecotourism Action Plan for Bulgaria (NETAP) is directly derived from the National Ecotourism Strategy for Bulgaria (NETS) and is augmented by Regional Ecotourism Action Plans (REAP) for 12 ecotourism destinations in Bulgaria, as well as contributions from six National Thematic Focus Groups (NTFG).

Ecotourism action plans for 12 potential ecotourism destinations were developed between August and November of 2003. The following organizations participated in the action planning development, which was coordinated by the USAID-funded BGEG II Project:

- Pirin Tourism Forum;
- Rhodopes Regional Tourism Association;
- Bourgas Regional Tourism Association;
- Central Balkan – Kalofer Ecotourism Association;
- Rila Ecotourism Association;
- Stara Planina Regional Tourism Association;
- Varna Tourism Chamber;
- World Bank Danube River Wetlands Project – for the Danube River Basin;
- UNDP Rhodope Project – for the Eastern Rhodope;



- Regional Environmental Center (REC) Western Stara Planina Project – for the Western Stara Planina; and
- Pernik and Kyustendil Regional Administrations – for the Western Border area.

The Foundation for Local Government Reform (FLGR) also participated in the regional planning process.

The planning process included over 400 meetings and workshops, attended by more than 1500 people representing over 800 different institutions and organizations. Approximately 140 municipalities were engaged in the process.

Publicity surrounding the action planning was generated by 18 press conferences and over 120 registered publications and broadcasts in local and regional media.

Action planning activities were funded by USAID and supported by three additional donors: UNDP through its various programs, REC (through the Government of Switzerland via the Stability Pact), and the World Bank/Global Environment Facility (GEF) through its Danube River Wetlands Project.

Regional Ecotourism Destinations and their Action Plans

Ecotourism in Bulgaria is linked with nature conservation. It revolves around protected areas and other natural areas in the country, and is augmented by Bulgaria’s rich cultural and historical heritage. The nation’s protected areas remain central to a national protected area network and are central to a National Ecological Network (NEN) as stipulated in the Biodiversity Act of 2002. The NEN will eventually form a national system of core protected areas, “buffer zones” and other areas key to biodiversity conservation. The number of these areas is unusually high for a country the size of Bulgaria, illustrating the nation’s importance in European landscape and biodiversity conservation. These areas also provide opportunities for nature-based tourism, and are key components of regional ecotourism destinations.

Communities and lifestyles that are supportive of contemporary conservation objectives, that preserve cultural objects and traditions, and contribute to sustainable livelihoods, help to describe regional ecotourism destinations in Bulgaria. This combination of natural and human elements reflects a strong union protective of the nation’s landscape. This union is typically supported by a strong sense of local identity, and nurtures a variety of local customs, cuisine, agricultural practices, architecture and history. Since a strong sense of “home” and local natural resource tenure are prerequisites for investment and environmental protection, the NETAP is an important tool to perpetuate these practices at local levels. Regional ecotourism destinations can form the cornerstones of national ecotourism development, and are a key component of Bulgaria’s future national sustainable tourism agenda. The ability to act locally and think globally is supported through the focused development of these regional ecotourism destinations. Each of these destinations becomes the focus of local sustainable tourism activities, and contributes to a national network of ecotourism products and services that keep biodiversity conservation, sustainable livelihoods and local economic growth at their core. This approach and its products can be the basis of regional “branding” and can be Bulgaria’s comparative advantage.



For the purposes of ecotourism action planning, 12 regional ecotourism planning regions were described, resulting in the development of 12 “regional” ecotourism action plans. Criteria for choosing these regions included capturing the largest regional audiences, identifying key natural and cultural treasures, and encouraging local, decentralized planning. Central to this regional action planning effort were the activities and programs of local tourism associations. These associations are vital to all future regional and national ecotourism planning and development.

In the implementation phase of the Action Plan, these planning regions are now designated regional ecotourism destinations. They can become focal points for ecotourism product development. They can form a cluster of ecotourism development opportunities, actors, and attractions around which action plan implementation can take place. Each regional ecotourism destination is complemented by:

- Protected areas that are the focal point of an ecotourism cluster. Protected areas remain central to the NEN—the NEN also includes areas of biodiversity importance outside the national protected area network;
- Areas of rich biodiversity and special landscapes that fall outside the protected area system;
- Important cultural sites and monuments of national and international importance. Each regional ecotourism destination includes opportunities to strengthen local practices, customs and traditions that (re) build civic pride, and are a source of inspiration for conserving village lifestyles and sites of local cultural importance;
- Agricultural practices and products that are indicative of a strong local character, localized production, and micro-climatic conditions; and
- Presence of ecotourism associations, regional ecotourism products and active, interested stakeholders.

The following ecotourism destinations provided a geographical focus and framework for NETAP:

1. Southwestern Bulgaria
2. Western Rhodopes
3. Eastern Rhodopes
4. Strandja, Eastern Trakia and the Southern Black Sea Coast
5. Eastern Balkan (Stara Planina)
6. Central Balkan National Park South
7. Vitosha – Northern Rila
8. Western Border
9. Western Balkan (Stara Planina)
10. Central Balkan National Park – North
11. Northern Black Sea Coast and Dobrudja
12. Danube River Wetlands Ecotourism Destination

Action planning in these areas contributed significantly to consolidation of regional ecotourism initiatives and increased levels of stakeholder coordination and dialog. Action plan-



ning afforded most of the country the opportunity to link local expectations and opportunities to ecotourism development within regional and national planning contexts.

National Thematic Focus Groups

The planning process was further augmented by the creation of six national-level ecotourism theme groups whose task was to develop concrete actions required in the following macro-level issues for ecotourism in the country. A professional facilitator moderated each focus group session, which in turn was guided by a technical expert for each thematic group.

The six themes included:

- Information Technology (IT) and Geographical Information Systems (GIS)
- Product Development and Marketing
- Funding and Financial Mechanisms
- Enterprise Development
- Institutional Development
- Regional Development

The focus group meetings included a total of 76 participants representing 46 institutions and organizations from the public and private sectors, NGOs and academic institutions.





A girl from Chiprovtsi is weaving a carpet

The formulation and subsequent implementation of NETAP is predicated on some basic assumptions, and coordination and resource realities.

Assumptions

2.1.

Basic assumptions include:

- *Formal Adoption.* NETS and NETAP will be adopted as formal policy tools for guiding ecotourism development in Bulgaria at national, regional and municipal government levels.
- *Political Will.* All the key agencies and organizations identified in NETAP must be engaged in the process as willing partners. To succeed, this segment of the national tourism development agenda will need the commitment and a clear allocation of tasks among local, regional and national government bodies.
- *Resources.* There is sufficient demand, sufficient local initiative and a well-defined competitive advantage for ecotourism in Bulgaria to warrant the allocation of funds for its development. NETAP is the first step in the identification of resources. Government, donors, NGOs and the private sector will need to collaborate in the identification and allocation of resources to make this action plan a success.
- *Ecotourism Specificity of Action.* Ecotourism is a segment of the overall national tourism sector with strong links to other types of tourism. Equally, it is an important segment in rural economic and social development. However, few of the actions defined in NETAP are purely ecotourism specific: e.g., SME development and advisory needs for this segment are essentially the same as for other SME sectors, and include business planning, customer servicing, marketing, etc. Where existing support structures exist, the task is to integrate ecotourism within these. Where they do not, ecotourism can act as a catalyst or pilot for the creation of wider support services.
- *Development Status.* It is clear from the REAPs that the infrastructure, access, capacity and capabilities of ecotourism destination areas vary considerably. Some areas enjoy a well-developed cluster of businesses, associations and agencies within or close to high-volume tourist concentrations. Other destinations are missing a tourism market segment and development. Each regional ecotourism destination will need to revisit their respective REAP and consider their priorities for action in the context of NETAP.

Ognian Enev



Several ministries are directly involved in developing ecotourism in Bulgaria and some have specific responsibilities and roles for its development. Coordination between these ministries is essential. The Protocol for Cooperation in the Area of Ecotourism was signed in October 2002 between the Ministry of Environment and Waters (MOEW), the Ministry of Economy (MOE) and the Ministry of Agriculture and Forests (MOAF). However, the agreement is not a mechanism for practical implementation of this coordination, and there is no special body within the ministries, or on an inter-institutional level that is committed to implementing the NETAP.

The state supports all government institutions (at national, regional and local levels) that manage tourism development (and subsequently ecotourism development) through these three ministries. There is no ecotourism investment fund, and few funds are available for capital investment projects in infrastructure and municipal service improvement. MOEW supports the implementation of ecotourism projects also through its National Environmental Enterprise Fund, but this amount is a relatively small part of its annual 70 million BGN budget.

Other funding sources include international donors active in Bulgaria: USAID, EU PHARE, EU-SAPARD, UNDP, GTZ, SDC, JICA, the governments of Monaco and France, etc. Many of the programs of these international donors are not directly devoted to ecotourism development, but they provide financial and technical assistance for SME development, for nature conservation, or for institutional strengthening or decentralization. Many of these themes can be related to the ecotourism action plans at national and regional levels.

Private banking investment in ecotourism is still limited. There are few examples of loans for ecotourism projects provided by commercial banks. Ecotourism financing faces several challenges. Typically the average ecotourism project is too small to provoke substantial interest on the part of banks. The income generated from such projects is often volatile and seasonal, creating concern about timely repayment of loans. In many cases the entrepreneurs applying for funds for ecotourism projects lack a track record of successful business operations usually required by banks.

Yet, there are a growing number of banks with positive attitudes towards loans for ecotourism at the village/community level. From the bank perspective, ecotourism projects are SME loans and have to meet the standard set of loan approval criteria.

Other investment projects include the renovation of privatized hotels and state buildings that include both improvements and investments in environmental management practices and technologies. Many banks have advised that most rural, community-based and local ecotourism projects should try using private equity first and then, after a couple of years with a successful operating history, approach the banks with their loan application. With the growth in the field of ecotourism in Bulgaria, increasing stability in the banking sector, and a greater number of regional and local banking offices, the efforts to create an enabling environment for ecotourism are making commercial loans increasingly accessible.





Rila Monastery

Prof. Michail Enev

NETAP is intended as an operational document. Its content is wholly and comprehensively compatible with its source documents: the National Ecotourism Strategy (NETS) and the REAPS.

NETS defined groups of recommended actions within four strategic objectives. Most of the specific actions were dependent on other actions. In other words, they were components of “action chains”.

The definition of these dependencies to each action enables them to be sequenced and inter-linked. Specific sets of actions were assembled within 9 action chains:

- Finance/Funding
- Indicators/Monitoring
- Institutional Development
- Information Systems
- Infrastructure
- Marketing
- Product Development
- Quality/Certification
- Training



Prioritization Criteria

A set of criteria was developed to consolidate regional and national ecotourism actions. The purpose of these criteria is to sort out the 120 actions suggested by NETS and the additional ones identified during the regional and national action planning process.

The following criteria were used after the regional planning process and to consolidate national planning into the NETAP:

- The action is consistent with the vision and strategic objectives of NETS.
- Existing institutions who appear willing to undertake responsibility for actions in either a leading or support role have been identified.
- Potential sources of funding and other resources to implement the action plan have been identified.
- The action can catalyze some form of economic growth in rural areas in the next five years.
- The action is consistent with other Bulgarian government policies, strategies or plans.
- The action is realistic and may be potentially funded by donors seeking high impact, replicable rural development and economic growth initiatives.

The 9 action chain categories described earlier were further consolidated using these prioritization criteria. Actions were selected which met Criterion 1, and at least one additional prioritization criterion measure.





*House
in the Architecture
Historical Reserve
Bojentsi village*

*RTA "Stara Planina"
Archives*

The following six themes are used to organize and present NETAP's priorities:

- Information Management
- Ecotourism Enterprise Development
- Product Development and Quality Assurance
- Marketing and Promotion
- Human Resource Development and Training
- Institutional Development

Each one of these ecotourism action themes is a "sub-program" of the national ecotourism action plan. Each theme is complemented by a set of specific, priority actions. Each action is, in essence, a project with objectives, activities, etc. The template presented below is used to organize project identification and project content.



ACTION

Description

A brief explanation of the action and its objective.

Rationale

Why is this action important?

Strategic Objective(s)

The relation of the action to the National Ecotourism Strategy

Anticipated Results

What should happen as a result of this action?

Activities

Illustrative activities to be carried out.

Illustrative Indicators

How will the success and/or impact of this action be measured?

Lead Agency/Partners

What is the lead agency, and which partners should join this action effort?

Duration

How long will/should the action last?

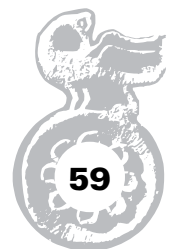
Funding Sources

What are likely sources of funding?



Critical to all ecotourism development activities is the collection and management of product information, statistics, ecotourism promotion images, etc. National and regional product development and marketing planning require extensive information on markets and tourism market trends. A considerable amount of ecotourism information is currently held by ministries, municipalities, NGOs, regional tourism associations, and national and nature park directorates, but it is fragmented, and often in incompatible formats. The creation and maintenance of an accessible, national database of information is fundamental to NETAP. Information access and information sharing must be expedited to propel Bulgaria as a regional leader in ecotourism development. The following actions are proposed to integrate ecotourism information into the eventual development of a national GIS for ecotourism that complements the future national sustainable tourism development agenda:

- Create an Ecotourism “Best Practices” Internet Portal,
- Develop a Digital Library of Ecotourism Media Resources,
- Include Ecotourism Data Collection into Tourism Data Collection,
- Design an Ecotourism Information Management System,
- Populate the Ecotourism Information Management System, and
- Create and Implement a National Signs Standard.



Description

To create an up-to-date, Internet-accessible library of international and national best practices in areas of activity relevant to ecotourism and sustainable tourism. These should include at a minimum:

- Certification systems;
- Best national and regional ecotourism product development practices and operational models, as well as best practices from the international experience;
- Site interpretation; and
- Links to national and international organizations and financing institutions.

Rationale

There are myriad examples of tried and tested, well-documented, readily accessible ecotourism programs and initiatives in the international arena. The wealth of this experience, adapted to Bulgarian needs, will significantly reduce development time and resources, help ensure that Bulgarian practices rapidly become compatible with the best international practices, and increase awareness of the tourism segment’s importance in economic and social development. Many of these need to be translated and made available to a wide audience through regional ecotourism/tourism associations.

Strategic Objective(s)

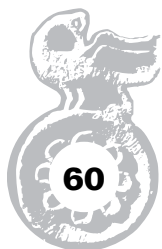
The implementation of the action will address the following objectives of the Strategy: 5.2.2; 5.2.7; 5.3.7

Anticipated Results

- Accelerated NETAP implementation time scale;
- Reduction in financial and resources required for implementation;
- High quality products and systems; and
- A potential vehicle to access international technical assistance for long-term ecotourism program implementation.

Activities

- Create database structure.
- Collect ecotourism-related “best practice” materials.
- Deliver relevant equipment.
- Publish key sections of the database on government websites.
- Develop and provide access to multilingual information sources.



- Regularly update and maintain the database, and to the extent possible, engage the private sector in this process.

Note: These activities could lead to upgrading the MOE ecotourism website to making this database of best practices accessible over the Internet. See Appendix 1 of this Action Plan for a preliminary listing of web-accessible sources. A vast array of digital resources and Internet sites are available and growing rapidly, e.g., www.eco-tour.org is a consumer website and provides information on accommodations, tours (from tour operators) and destinations.

Illustrative Indicators

- Adoption of best practices;
- Adaptation of best practices within Bulgarian tourism sector; and
- Estimates of time and resources saved.

Lead Agency/ Partners

Executive Tourism Agency and the Ministry of Economy, with support and assistance from the Foundation for Local Government Reform; Ministry of Environment and Waters; Ministry of Agriculture and Forests; Ministry of Culture; branch, product, regional and local tourism associations; Bulgarian Tourism Union; and National Sustainable Development Association's "Good Alternatives".

Duration

Create indexed database and begin input of models by end of Year 1; continuously update thereafter. Periodic review of validity of content in Years 2 to 5.

Funding Sources

GoB, SAPARD, international donors



Description

To develop an electronic catalogue (library) containing digital maps, photos, video clips, and other important visual information for tourist sites and itineraries. This digital library should, in addition, meet the needs for advertising materials among agencies and organizations involved in national tourism promotion, and international presentations.

Rationale

National ecotourism promotion efforts are made more successful when materials are available for agencies engaged in tourism promotion, marketing, and product development. This is a requirement for both international and national ecotourism product development and promotion. An electronic “library” will be used to support public awareness efforts of the national and regional ecotourism associations.

**Strategic
Objective(s)**

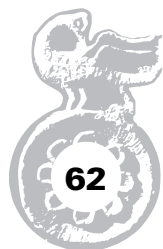
The implementation of the action will address the following objectives of the Strategy: 5.2.1; 5.2.7; 5.3.2

**Anticipated
Results**

Ecotourism products support national marketing efforts, and library information is used in support of international, national and regional public awareness programs.

Activities

- Create appropriate database structure; specify guidelines on content and format of differing data types including photographs, product profiles, consistent use of national and regional sign symbols etc.
- Collect materials.
- Analyze database coverage, and commission new materials as necessary.
- Develop guidelines for wide data access, sharing and use.
- Publish on government websites.
- Regularly update digital library. *Note:* The Digital Library of Ecotourism Media resources should be designed and collected so it can be easily integrated and managed as part of the overall Ecotourism Information Management System as per Action 4 below. This includes guiding the selection of compatible data formats, digital data quality requirements, requirements of the geographical coordinate systems used, etc.



Illustrative Indicators

Number of entries in the library; improved national promotional materials; digital library regularly maintained and updated, national and regional ecotourism stakeholders evaluate the library as accessible and easily used.

Lead Agency/ Partners

Executive Tourism Agency; Ministry of Economy; Ministry of Environment and Waters; Ministry of Agriculture and Forests; Ministry of Culture; local, regional, product and branch tourism organizations; Ministry of Regional Development and Public Works; Ministry of Education; and Bulgarian Tourism Union.

Duration

1 year

Funding Sources

GoB and NGOs who can contribute materials developed through implementing projects.



Description

To include data collection on ecotourism in national tourism data collection systems and surveys, so that visitor profiles, demographics, activities and expenditure patterns can be analyzed. This effort forms part of a market intelligence system that will enable the impact of developments and trends in national and regional ecotourism to be monitored in parallel with those for the tourism sector. These include:

- Volume,
- Country/region of origin,
- Demographics,
- Duration of stay,
- Location,
- Gross and average expenditure,
- Season,
- Special interests,
- Satisfaction levels,
- Training programs, and Investment opportunities.

Rationale

Statistics are important tools in the development of the ecotourism market at regional and national levels. They are also an important source of information when ecotourism is part of economic development and planning. Information collected as part of these exercises will help to:

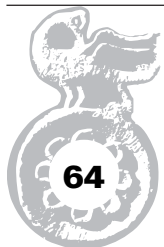
- Monitor the impact of NETS and review strategic direction;
- Identify the relative impacts of product development, marketing campaigns and cluster development;
- Identify Bulgaria's performance in relation to global and regional trends in ecotourism; and
- Justify the prominence given to the ecotourism segment within the overall national marketing profile and its share of national resources.

**Strategic
Objective(s)**

The implementation of the action will address the following objectives of the Strategy: 5.2.1; 5.3.1; 5.3.5; 5.4.1

**Anticipated
Results**

- Better knowledge of ecotourism market segments and of the needs and expectations of the potential consumers of ecotourism products and services;
- Efficient monitoring and direction of development priorities;



- Continuing review of market penetration; and
- Identification of new product development opportunities.

Activities

- Identify existing surveys conducted regionally and nationally.
- Develop new data collections tools at appropriate levels.
- Formulate questions relevant to the ecotourism sector.
- Specify format of required analyses.
- Integrate these within survey methodologies and analytical systems.
- Disseminate analyses within government websites and annual ecotourism statistical report.

Note: Data collected when implementing Action 3 should be designed and collected in a compatible format with, and managed as part of, the overall Ecotourism Information Management System as per Action 4 bellow. This includes compatible data formats, digital data quality requirements, etc. The data collected in Action 3 will serve the development of the database of existing products in Action 5.

Illustrative Indicators

Survey of users on relevance of statistics and analyses.

Lead Agency/ Partners

Ministry of Economy; national, regional and local tourism associations; Ministry of Environment and Waters; Ministry of Agriculture and Forests; Ministry of Culture; and Bulgarian Tourism Union.

Duration

Specify requirements in Year 1; integrate into collection process in Year 2; and publish analyses in Year 3 and every year thereafter.

Funding Sources

GoB; as well as all sources funding ecotourism projects



Description

Design a user-driven, meta-database to ensure that information and materials on ecotourism products, development, and marketing activities conform to nationally compatible formats covering:

- Sites (natural and cultural),
- Trails,
- Accommodation facilities, shelters, dining and recreation facilities,
- Transportation,
- Tourist businesses,28. Niche products,
- Itineraries,
- Virtual tourist routes,
- Craft products,
- Goods and services, and
- Events and festivals.

Rationale

Many key activities in product development, the production of marketing materials, tourism information and interpretation require access to large volumes of information, statistics and images. The development of a national digital information management system over time will require that all relevant materials are collected in compatible formats, and operated and maintained in a common information management framework. The system should describe data sets, data entry and access protocols, digital formats, website and printed applications, etc. The system should be GIS compatible, and accessible and compatible with other tourism information management systems.

Strategic Objective(s)

The implementation of the action will address the following objectives of the Strategy: 5.2.1; 5.2.4; 5.3.7; 5.3.2

Anticipated Results

- Cost and time-effective assembly of materials;
- Better quality of final outputs; and
- Effective incorporation of ecotourism sector into general tourism marketing and informational products and services.



Activities

- Further identify and collect existing information sources within ministries, NGOs, national parks, etc.
- Structure database in conformity with national GIS.
- Specify guidelines on content and format of differing data types including photographs, product profiles, including consistent use of national sign symbols and regional product logos.
- Disseminate guidelines to all data sources and potential users.
- Provide appropriate training in operations and maintenance.
- Implement pilot project for at least one regional ecotourism information management system.

Note: Actions 2, 3, 4 and 5 are interrelated and rate special attention. They should be coordinated and organized to be mutually reinforcing.

Illustrative Indicators

User acceptability of guidelines via consultation and feedback.

Lead Agency/ Partners

Ministry of Economy; Ministry of Environment and Waters; Ministry of Agriculture and Forests; national, regional and local tourism associations and information centers; and Ministry of Culture.

Duration

Year 3

Funding Sources

GoB, international donors, and NGOs.



Description

Based upon the completion of the design of the Ecotourism Information Management System, this activity will populate the database using existing information. Wide access of the data will aid product marketing. Data will be sorted initially by type and location to enable production of a variety of reports in digital formats (e.g., craft products and outlets close to a protected site) with an emphasis on web-based applications.

Rationale

Information and images are fundamental requirements of a number of activities (e.g., brochure/website design, tourist information materials, and itinerary development). A vast amount of information is currently held in ministries, municipalities, NGOs, regional tourism associations, national parks, etc., but is contained within a fragmented series of databases, and in non-digital or inappropriate formats. This information needs to be consolidated. Activities 1, 2, and 3 will help to populate this system. Currently users are not aware of existing data or how to access it.

Strategic Objective(s)

The implementation of the action will address the following objectives of the Strategy: 5.2.1; 5.2.2; 5.2.6; 5.3.7

Anticipated Results

- Cost and time savings in information collection and collation;
- Efficient identification of “economic growth clusters” for product development and marketing purposes;
- Improved communications (e.g., mailing lists); and
- Higher quality and consistency of marketing materials.

Activities

- Further identify and collect existing information sources within ministries, NGOs, protected area administrations, etc.
- Format in accord with parameters established by Ecotourism Information Management System.
- Further identify and develop a national network of information management “nodes” for system operations and maintenance.
- Make system available on-line via government and other approved websites.
- Train appropriate local, regional and national bodies to update information on-line via standard templates, and support with an incentives system for future information delivery and use.



Illustrative Indicators

- Frequency and volume of information downloads and online updates;
- User satisfaction via online surveys; and
- Number of information management nodes established and consistency with which information is updated and managed effectively.

**Lead Agency/
Partners**

Executive Tourism Agency, Ministry of Economy, Ministry of Environment and Waters, Ministry of Agriculture and Forests, tourism associations

Duration

Identify sources in Year 1; populate database by Year 2; have system on-line and operating by Year 3.

Funding Sources

GoB, International Donors, tourism associations, private sector



Description

The creation and implementation of national standards for ecotourism signs to attractions and sites based on internationally recognized symbols and color. Standardize the symbols and keys used for national, regional and local tourist maps and marketing materials.

Rationale

The implementation of coherent, recognizable signs is an important tool in the development of domestic and international independent travel. Clear advance signs to attractions and instantly recognizable symbols of the different types of attractions to a variety of travelers and languages are critical to the growth of this tourism segment. Incorporation of the symbols into tourist marketing material, maps and guides will facilitate the development of tourist routes and itineraries and increase market awareness of products and product clusters.

**Strategic
Objective(s)**

The implementation of the action will address the following objectives of the Strategy: 5.2.1; 5.2.6; 5.2.7; 5.3.6

**Anticipated
Results**

- Increased visitation and consequent visitor expenditure;
- Increased numbers of self-driven, self-guided visitors;
- Profiles of individual attractions strengthened by enabling them to promote themselves as part of a cluster group; and
- Visitor satisfaction surveys regarding signs improve.

Activities

- Identify European (e.g., Scottish Natural Heritage site signs) and Bulgarian (e.g., Bulgarian Tourism Union) signs, review and adapt to Bulgaria.
- Prepare guidelines and standards for sign production.
- Review guidelines and standards with tourism associations, site managers of attractions, protected area administrations, etc.
- Provide guidelines to allow sign standards to be incorporate in regional and municipal development plans and their implementation.
- Implement sign standards nationwide.



Illustrative Indicators

- Increased visitation;
- Increased number of signed routes;
- Increased visitor satisfaction;
- Adoption by tour operators in product packages; and
- Adoption by municipalities in development activities.

Lead Agency/ Partners

NEW Group; Ministry of Economy; Ministry of Environment and Waters; Ministry of Agriculture and Forests; protected area administrations; tourism associations; Ministry of Culture; Bulgarian Tourism Union; Road Agency; and Ministry of Youth and Sports

Duration

Define and promote in Year 1; national parks adopt and implement in Year 2; target municipalities participate by Year 3; expand system to each ecotourism destination region by Year 5.

Funding Sources

GoB, all funding sources

Ecotourism Enterprise Development

4.2.

Diversification of products and services will generate and/or increase visitor expenditures and contribute to the regional and national economies. Small and medium enterprises (SMEs) will be the major vehicle for developing and providing direct ecotourism visitor services, appropriate facilities, and indirect support services. However, at least for the foreseeable future, SME's scope and size will remain relatively small. SMEs must be well managed to maximize their contribution to the economy. Business training will help provide a high-quality product, particularly visitor-servicing training. Sufficient resources will be needed to fund this training, which will require access to bank and equity finance. New small business startups are essential to fill gaps in services and facilities, and to provide a mechanism for economic growth in less developed areas. Initial startup costs and development of a customer base over time places significant constraints on new businesses, necessitating fiscal and financial incentives. Stakeholders have identified the following as small enterprise priority actions:

- Develop and Operate Ecotourism Business Growth Centers;
- Provide Ecotourism Business Advisory Services;
- Create Ecotourism Financial Incentive Mechanisms;
- Assist Small Ecotourism Enterprise (Accommodation) Development; and
- Develop and Support Capital Markets and Mechanisms for Ecotourism.



Description

Develop and operate ecotourism enterprise growth centers (ecotourism business clusters) within selected, existing municipal business advisory centers. These business clusters may form associations and become an instrument for economic development that supports micro, small and medium-sized tourism businesses in regions where there is a high potential for nature-based tourism activities and a relatively underdeveloped private sector.

Rationale

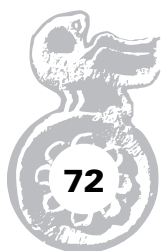
A growth center provides a microenvironment for enterprises whose activities accelerate the process of economic development and increase the likelihood of business growth by: 1. Conserving entrepreneurs' most scarce and precious resources—time and money—through *cost sharing*, *time saving* and *capital conserving* access to affordable space, services and equipment. The provision of these services must be flexible and timely and offered in ways tailored to entrepreneurs' actual requirements; 2. Helping entrepreneurs overcome barriers and constraints to enterprise growth that arises from the macroeconomic environment, such as regulatory barriers, lack of information and problems of access to capital; and 3. Accelerating rate at which entrepreneurs learn core elements of business planning. Centers provide information interchanges, mentors, technical and management assistance, workshops and ready access to training/learning resources. They serve as focal points for business design, management, and networking and encourage the development of business people in groups that are cooperative and supportive of common goals.

Strategic Objective(s)

The implementation of the action will address the following objectives of the Strategy: 5.2

Anticipated Results

- A network of competitive ecotourism enterprises in a region operating in support of biological and cultural diversity;
- A model for growth centers in ecotourism, potentially replicable throughout Bulgaria;
- A mechanism for supporting protected areas and other attractive natural areas in various regional destinations;
- Greater harmony between the financial sector and entrepreneurs in ecotourism, creating possibilities for other interested entrepreneurs; and
- A sustainable nucleus of complementary enterprises, united by standards and concerns for local environmental and social issues.



Activities

- Develop a network of ecotourism enterprises with complementary products and services. The group of potential participants in an ecotourism enterprise growth center (ecotourism business clusters) could include protected areas, local outfitters and tourism operators, lodging in local communities, construction/conversion of hotels/inns into environmentally managed “ecolodges”, rental agencies for bicycles, horses, special vehicles, souvenir shops and artisan products, associations of specialized guides, artisans, etc.
- Assist enterprises in conducting prefeasibility analyses of ecotourism business concepts and products.
- Share SME standards and performance requirements for specific types of ecotourism businesses.
- Provide business incubation or acceleration support through access to venture capital, commercial banks, or special funds.

Illustrative Indicators

- SMEs new venture startups or accelerated business development;
- Investment capital; and
- Profitability, return of investments (ROI), and employment.

Lead Agency/ Partners

Small and Medium Enterprise Agency; National Association of the Municipalities in the Republic of Bulgaria; Foundation for Local Government Reform; National Business Development Network Association; Ministry of Labor and Social Policy; Ministry of Economy; Executive Tourism Agency; tourism associations; regional municipal associations; and local authorities.

Duration

5 years

Funding Sources

UNDP/Ministry of Labor and Social Policy– JOBS Program, other bilateral and multilateral donors, and the GoB



Description

Provide one-stop shops for ecotourism businesses within existing chain of municipal business advisory centers (Action 7) offering resources and advice on business planning, training courses, certification schemes, incentive schemes, sources of finance and investment and market statistics. The one-stop shops should be established and marketed only once demand and a credible range of ecotourism support services and resource materials are in place and Center staff are trained in their application.

Rationale

To satisfy the demand among ecotourism SMEs for comprehensive, accessible advice on business support services and how to access them.

**Strategic
Objective(s)**

The implementation of the action will address the following objectives of the Strategy: 5.2.1; 5.2.3; 5.2.4

**Anticipated
Results**

- Better quality of business plans,
- Increased business startup and survival rates,
- Increased investment in the ecotourism sector, and
- Increased business confidence.

Activities

- Confirm operational parameters and location of one-stop shop target centers initially within priority regional ecotourism business clusters.
- Physically establish one-stop shop with sufficient space, dedicated staff and equipment, in each priority target center.
- Train staff in support of ecotourism development activities.
- Develop operational network of these centers through regular information-sharing and cross-visits.
- Identify and publicize best practices.



Illustrative Indicators

Number of ecotourism SME enquiries; frequency and consistency of use of support services; and training courses offered and evaluated as successful and useful after the course, and six months later.

Lead Agency/ Partners

Small and Medium Enterprise Agency; National Association of Municipalities in the Republic of Bulgaria; Foundation for Local Government Reform; NEW Group; National Business Development Network Association; and tourism associations.

Duration

Implement in 3-4 target areas in Year 3. Expand into other areas as demand grows.

Funding Sources

Donors



Description

Create a package of financial incentives for new business startups and SME growth including grant schemes, fiscal incentives, equipment leasing and credit guarantees. The package will be targeted at ecotourism businesses in underdeveloped areas with identifiable ecotourism development potential.

Rationale

The startup costs and initial investment requirements for new and developing ecotourism businesses place severe cash flow strain on most rural ecotourism business developers, leaving them vulnerable in the initial years of operation as they develop a customer base in underdeveloped areas where lack of supply and facilities has historically constrained demand. This in turn increases their perceived risk to banks and institutional investors who generally have little experience in the ecotourism sector. To stimulate business development in these areas, mechanisms are necessary to reduce startup/initial investment costs, defer these over longer periods, and provide credit guarantees.

Strategic Objective(s)

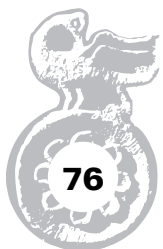
The implementation of the action will address the following objectives of the Strategy: 5.2

Anticipated Results

- Increased business startups and survival rates;
- Increased investment into the ecotourism sector;
- Increased local employment; and
- Increased tax revenues in the medium to long term.

Activities

- Institute National Warranty Fund (NWF) for ecotourism SMEs and identify appropriate delivery mechanisms.
- Provide access to funds regionally.
- Identify mechanisms that allow municipalities to generate funds for SME ecotourism business support.
- Identify financial support mechanisms that may include tax credits and deferrals, and other incentives.
- Identify and support specialized equipment leasing schemes.
- Assemble incentives as ecotourism business development packages and extend through the ecotourism business growth centers and associated advisory services.



Illustrative Indicators

- Amount of investment generated;
- Number of new startups;
- 3-year survival rates; and
- Local employment in ecotourism businesses.

Lead Agency/ Partners

Ministry of Economy; Ministry of Environment and Waters; Ministry of Agriculture and Forests; National Business Development Network Association; national, regional and local tourism associations; local governments; National Association of Municipalities in the Republic of Bulgaria; and NEW Group.

Duration

Identify mechanisms in Year 1; create NWF in Year 2, regional funds in Year 4; make fiscal support package available in Year 3; have full incentive package in place by Year 4.

Funding Sources

GoB, donors



Assist Small Ecotourism Enterprise (Accommodation) Development

Description

Develop and operate a program to connect small hotels and other accommodation facilities and shelters with ecotourism sites, attractions, events, festivals, tours and related activities of interest to national and international visitors.

Rationale

This action would benchmark and adapt the Small Tourism Enterprises Program (STEP) to Bulgaria's small business enterprises. The Organization of American States (OAS) Inter-Sectoral Unit for Tourism and USAID partnered in recent years to expand the OAS Small Hotels Project to encompass sites and attractions. The result was STEP, which is a program that can be adapted to other regions of the world.

Strategic Objective(s)

The implementation of the action will address the following objectives of the Strategy: 5.2.1; 5.2.2; 5.2.4

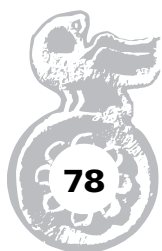
Anticipated Results

- Product development and training programs for participating small hotels and other accommodation facilities and shelters (and ultimately other small tourism enterprises) developed;
- Marketing of the brands and standards including management of the "Ecotourism - Naturally Bulgaria" web portal and all marketing arrangements related to the small hotel brands; and
- Development of tourism packages and organized marketing.

Activities

Developing the tools and structures for implementation of:

- Needs assessment for small tourism enterprises (sites, attractions, community tourism);
- Operational guidelines for small hotels;
- A coaching system and STEP walk-in centers (one-stop shop) to support product development;
- Occupational standards for small hotels;
- A comprehensive environmental management program (i.e., waste, energy, water, etc);
- Volunteer programs and partnerships—e.g., university student volunteers to assist small hotels and other accommodation facilities and shelters through providing methodological guidance; and



- A national web portal including reservation systems capability, built around “Ecotourism - Naturally Bulgaria” as the overall brand for the small hotels sector.

Illustrative Indicators

Hotels enrolled in services; website “hits” and reservations made on portal website; visitor satisfaction survey results; occupancy rates; average daily rates; and jobs created.

Lead Agency/ Partners

Bulgarian Association of Hotel and Restaurant Keepers; tourism associations; Ministry of Environment and Waters; Executive Tourism Agency; Ministry of Economy; local municipalities; private sector partners; and Bulgarian Tourism Union.

Duration

5 years

Funding Sources

Donors, interested associations, private business



Develop and Support Capital Markets and Mechanisms for Ecotourism

Description

Develop and support mechanisms that allow private investors and municipal government to engage in public-private ecotourism SMEs, to create less expensive, larger scale and more flexible funding of ecotourism projects. This effort will also examine mechanisms to attract a broader spectrum of local and international, individual and institutional investors.

Rationale

The sustainability of the ecotourism sector will depend, in part, on its cost-effectiveness and competitiveness as compared to other aspects of the tourism sector. This activity will investigate opportunities to attract funds through the public issue of shares and bonds. These opportunities will be evaluated for their positive impact on business project costs and how they are able to broaden the scope of project cost-effectiveness. The establishment of public holding companies that include SME consortia with an integrated management structure may help to consolidate and increase the cost-effectiveness of ecotourism providers on the one hand. On the other hand, it may assist these same businesses to gain credible access to a broader range of individual and institutional and/or local and international investors. Links with capital markets may give municipalities the opportunity to use available resources to support ecotourism businesses. The use of municipal bonds and joint enterprises are expected to act as a tool that avoids limitations of fiscal centralization. Various warranty schemes may also help turn municipal assets into a home for ecotourism development in local regions. Finally, there is a clear need for ecotourism to be considered as a viable investment area among venture capital markets.

Strategic Objective(s)

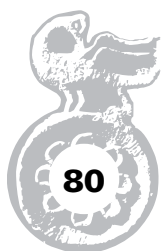
The implementation of the action will address the following objectives of the Strategy: 5.2.3; 5.2.4

Anticipated Results

Increase of cost-effectiveness and competitive business projects by involving improved management structures and effective funding of business projects in this subsector.

Activities

- Establish a working group of venture capital, municipal financing, and banking experts with local government experts and ecotourism practitioners. Define clear roles and responsibilities of relevant members and institutions.
- Prepare a program and instruction materials showing the advantages and mechanisms for setting up public holding companies and issuing public shares and bonds.
- Explore existing opportunities of SMEs and municipalities for their involvement in the process.
- Define the necessary steps to establish a pilot effort.
- Provide technical assistance in the elaboration of documentation and issuing of shares and bonds.



- Investigate and organize alternative means of attracting venture capital investments while simultaneously reducing costs and risks for ecotourism entrepreneurs.

Illustrative Indicators

- Generation of investments through these instruments;
- Establishment of publicly held corporations;
- Issuance of public shares and bonds—private, municipal and corporate; and
- Establishment of a “cost-effective” venture capital clearinghouse.

Lead Agency/ Partners

NEW Group; business associations; chambers of commerce; and investors’ associations.

Duration

Year 3- Year 5

Funding Sources

Donors, interested public-private investment associations, private business development

Product Development and Quality Assurance

4.3.

Product development and quality assurance lie at NETS’ core, centered on the country’s rich natural and cultural heritage. Bulgaria’s protected areas and heritage sites are possibly its greatest competitive strength. If these resources are not protected and managed well, Bulgaria will lose this advantage. Marketing and promotion cannot succeed without a competitive and continuously evolving product base, and rigorous quality assurance. A successful product development strategy can be achieved by:

- defining product development initiatives needed to penetrate new markets and to define Bulgaria’s ecotourism unique brand and identity;
- assuring a quality experience for all visitors;
- using ecotourism to promote the preservation of Bulgaria’s rich heritage;
- determining how to prioritize and fund product improvements;
- engaging local/rural communities in product development efforts; and
- partnering with other ecotourism development efforts in the southeastern Europe.

The following action plans are presented under this action theme:

- Create “Ecotourism - Naturally Bulgaria” Awards;
- Develop a Tourism Information Network;
- Promote Community Events and Traditional Celebrations;
- Pilot an Ecolodge Network;
- Plan and Develop a Protected Area Eco-Chalet System (Eco-Chalet Network);
- Support Ecotourism Products and Services Quality Assurance Certification; and
- Create an Ecotourism Volunteer Program.



Description

Create an annual award for quality ecotourism product development. The award would adopt the “Ecotourism - Naturally Bulgaria” theme, and is open to private business initiatives, national parks, other protected areas, NGOs, specific attractions and communities that have demonstrated innovations, environmental sensitivity, community benefit and market success.

Rationale

The award would promote and encourage best practices in ecotourism within the sector and raise regional and national public awareness through media reporting.

Strategic Objective(s)

The implementation of the action will address the following objectives of the Strategy: 5.2.2; 5.2.5; 5.2.7; 5.3.2

Anticipated Results

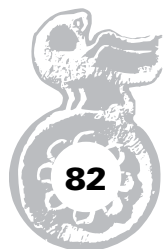
- Effective stimulation of ecotourism within the tourism sector through a competitive award based on quality improvement; and
- Direct benefits to winners through increased exposure, regional and national recognition, and support to reach international markets.

Activities

- Formulate award scheme including identification of awards, award categories, selection criteria and application mechanism.
- Compose and establish a national awarding body and regional counterparts.
- Promote the award scheme to all ecotourism segment participants, with an emphasis on the private sector.
- Identify national and regional sponsorship.
- Initiate and maintain an annual award program.

Illustrative Indicators

Number of nominees by category and location.



**Lead Agency/
Partners**

NEW Group; tourism associations; Ministry of Economy; Ministry of Environment and Waters; Ministry of Agriculture and Forests; Ministry of Culture; Bulgarian Tourism Union; Ministry of Youth and Sports; and Ministry of Regional Development and Public Works.

Duration

Formulate in Year 1; Establish awarding body and promote in Year 2; issue first annual awards in Year 3.

**Funding
Sources**

GoB, NGOs, business associations matched with national and international private sponsors



Description

Develop the existing network of tourist centers to stimulate visitor interest and awareness of the surrounding ecotourism opportunities, natural and cultural sites, and related products; and to provide visitors with essential information on local transportation, services, accommodation etc. Tourist Information Centers (TICs) should be developed as a priority in key destinations, represented by staff and volunteers trained in visitor relations and with a comprehensive knowledge of the local product. Where TICs currently exist, they will be upgraded in line with common national guidelines developed from best practice models. This will include, at a minimum, all materials using national sign symbols and national/regional branding logos. Information systems should be networked to enable visitors to obtain broader information about all other destinations. Dedicated TICs in major population centers should be augmented by tourist information materials and systems associated with major visitor centers (protected areas and cultural sites). Simple Tourist Information Points (TIPs) should augment this network at smaller sites and in small communities.

Rationale

The development of the domestic and international independent travel segments and the potential to draw visitors from existing resorts depends on staff capacity to inform visitors about local products as they move from one center to another. Small businesses do not have the capacity or resources to market themselves independently in the wider marketplace and require a mechanism for low cost access to it. It is possible and preferable to use existing facilities and infrastructure and to link TICs with protected area information and visitors centers.

Strategic Objective(s)

The implementation of the action will address the following objectives of the Strategy: 5.2.1; 5.2.5

Anticipated Results

- Increased visitor numbers and expenditure in rural areas;
- Longer stay times;
- Dispersal of visitors from major centers and routes;
- Increased visitor awareness and satisfaction;
- Reduction in SME marketing costs; and
- Consistency of product image.



Activities

- Identify existing TICs.
- Assemble interpretative media.
- Develop regional TIC themes and design.
- Design and install interpretative systems.
- Develop and deploy promotional materials.
- Upgrade existing TICs and develop new ones as appropriate.
- Conduct staff training.
- Create outreach information packages for visitor centers and simplified material for unmanned TIPs; promote adoption of these by protected area administrations, attractions, sites and communities.
- Network these centers through the use of appropriate technology.

Illustrative Indicators

- Number of TICs/TIPs enhanced and created;
- Visitor use;
- Staff engaged and performing functions; and
- TICs and TIPs operating and sustainable.

Lead Agency/ Partners

Regional, local, product and branch tourism associations; National Association of Municipalities in the Republic of Bulgaria; Executive Tourism Agency; Ministry of Economy; protected area administrations; cultural site managers; municipal authorities; and other ministries that have information centers throughout the country—Ministry of Agriculture and Forests, Ministry of Environment and Culture, Ministry of Youth and Sports, Ministry of Culture, and Bulgarian Tourism Union.

Duration

Identify sites and plan in Years 1 and 2; upgrade existing centers in Years 3 and 4; attract tourists and develop TIPs in Years 4 and 5.

Funding Sources

Local authorities and local entrepreneurs, GoB, donors, business associations



Description

Include and package calendars of local events, activities, festivals and fairs to enhance local product development and promotion.

Rationale

Rural Bulgaria is rich in local community events and traditional celebrations. Their inclusion as tourist products will:

- Enhance the overall product and local branding;
- Create a vital, dynamic, living dimension to the physical product;
- Enrich the visitor experience by enabling the visitor to participate in local community life;
- Involve communities directly in the delivery of the tourism product;
- Generate expenditure within the community; and
- Create linkages between ecotourism and cultural tourism sectors.

**Strategic
Objective(s)**

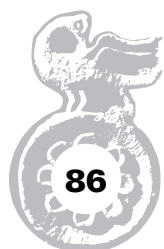
The implementation of the action will address the following objectives of the Strategy: 5.2.5; 5.2.6

**Anticipated
Results**

- Increased visitation and stay time;
- Increased visitor expenditure and disperse economic benefits into communities; and
- Increased visitor satisfaction.

Activities

- Prepare calendars of scheduled, regular events at local level, within each regional ecotourism destination
- Distribute events calendars within ecotourism business growth centers, and at regional levels.
- Incorporate calendars into marketing and tourist information materials.
- Plan and implement an event management training program using international best practice.



Illustrative Indicators

Visitor expenditure; local beds/occupancy; packages developed; new events catalyzed.

**Lead Agency/
Partners**

NEW Group; Ministry of Culture; Ministry of Economy; Executive Tourism Agency; tourism associations; tour operators; and local NGOs.

Duration

Continuing

Funding Sources

Donors, mobilization of local resources



Description

A pilot network of at least five ecolodges will provide visitor access to areas of exceptional flora and fauna, cultural sites and archeological resources. Each ecolodge would be unique, but incorporate the latest concepts of sustainable design, appropriate construction materials, waste management, energy efficiency, site selection, landscaping, services, and community connections. They should provide for relatively small groups, specialty package tours or for individual trip itineraries.

Rationale

There is great interest in developing ecolodges in the country, but no models have yet been developed. This pilot network could be expanded to other locations in Bulgaria and in the region.

Strategic Objective(s)

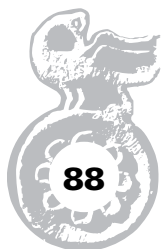
The implementation of the action will address the following objectives of the Strategy: 5.2.

Anticipated Results

Sustainable design principles would be demonstrated in each model ecolodge, positively influencing future designs for both small and large hotel properties.

Activities

- Conduct an ecolodge design and operations course(s) for architects and developers.
- Develop a plan for selecting ecolodge sites in collaboration with each major tourism association, Bulgarian Hotel and Restaurant-Keeper Association, and other representative hotelkeeper associations.
- Develop an Internet communications system to assure an effective reservation system, improve logistics; in addition, this system will be available to guests.
- Provide training in lodge management skills as well as visitor relations, house-keeping and food services.
- Use international benchmarks for appropriate technology in water conservation, waste disposal; and energy consumption, for each ecolodge.



Illustrative Indicators

- Participation in the course(s);
- Ecolodges constructed, community participation and benefit;
- Occupancy rates; and
- Profitability measures and investment levels.

**Lead Agency/
Partners**

Tourism associations; business associations; Bulgarian Hotel- and Restaurant-Keeper Association; Ministry of Environment and Waters; and Ministry of Economy.

Duration

5 years

Funding Sources

Private sector investment, donors



Description

Plan and develop a system of chalets located in protected areas and other natural areas (without construction of new ones), linked through a central reservations systems and branded marketing program.

Rationale

There is a relatively well-developed system of accommodation facilities in many of the mountains and protected areas. A strategic review of these existing resources should be conducted. Beginning with the national parks and the nature parks, which have approved management plans, a step-by-step process is needed to renovate, reorganize, or remove these existing facilities. Then the possibility of linking these chalets to international accommodation chains for ecotourism travel (both nationally and internationally) should be explored.

**Strategic
Objective(s)**

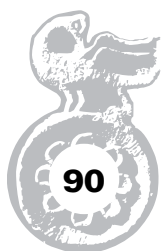
The implementation of the action will address the following objectives of the Strategy: 5.3.6

**Anticipated
Results**

- Existing network of chalets revitalized and attracting a specific market niche;
- Increase in the number of visits and overnight stays; and
- Increase of the average length of stay in the chalets.

Activities

- Review status of the existing facilities.
- Identify and review existing chalets in national and nature parks, and subsequently in other natural areas open to ecotourism.
- Clarify property tenure and operations issues.
- Identify project packages for chalet reconstruction and potential market segments.
- Identify available funding or investment interests (at national and international levels).
- Implement chalet packages; (reconstruction, removal, etc.).
- Market opportunities and activities associated with new chalet program.



Illustrative Indicators

- Number of modernized facilities;
- Number of visitors and overnight stays; and
- Income generated

**Lead Agency/
Partners**

Bulgarian Tourism Union, Ministry of Environment and Waters/Ministry of Agriculture and Forests, and Ministry of Youth and Sports.

Duration

5 years

Funding Sources

Donors, private investors, public-private ventures



Support Ecotourism Products and Services Quality Assurance Certification

Description

Raise the perceived and actual quality of the national ecotourism product by giving ecotourism businesses and visitor accommodation facilities and shelters the opportunity to gain internationally recognized certification in quality of service, environmental sensitivity and public safety/accessibility, adapted to Bulgarian needs. Initially, the priorities will be the:37. Adoption and extension of the PAN Parks quality certification scheme and other appropriate certification systems; and38. Adoption and extension of services, accommodation, health and safety, environmental quality, certification systems adapted to meet Bulgaria's needs.

Rationale

Ecotourism certification will provide a focus and template for businesses and facilities to strengthen their products, enhancing their competitiveness in the domestic and international markets. At national and regional levels, clusters of certified products will strengthen the competitiveness of and add value to the overall product by generating greater confidence in the Bulgarian product among visitors and tour operators. The certification process will also provide an additional focus for the development of ecotourism business growth centers/cluster groups around recognized quality standards.

Strategic Objective(s)

The implementation of the action will address the following objectives of the Strategy: 5.2.8

Anticipated Results

- Increased quality of ecotourism products and services;
- Increased visitor numbers, overnight stays and expenditure; and
- Increased income from accommodation services and visitor centers.

Activities

- Introduce the EU Commission Decree for ecological criteria related to the award of community ecolabels to tourist accommodation services.
- Promote the PAN Park scheme to national and nature parks, as well as other appropriate quality certification systems.
- Identify and adapt international quality assurance certification programs to Bulgaria.
- Prepare guidance and application materials.
- Promote and monitor certification regionally.



Illustrative Indicators

- Number of enquiries;
- Number of applicants;
- Number of certificates awarded; and
- Achieved benefits via periodic surveys of certified businesses.

**Lead Agency/
Partners**

NEW Group; branch, product, regional and local tourism associations; protected area administrations; Ministry of Environment and Waters; Ministry of Agriculture and Forests; and Ministry of Economy.

Duration

Develop and implement in Years 1 and 2; continue extension thereafter.

Funding Sources

Tourism business associations, Ministry of Environment and Waters, donors



Create an Ecotourism Volunteer Program

Description

Enlist the support of the general public in work programs through the creation of a range of projects managed by major ecotourism and cultural operations' stakeholders. The program would include:

- Development of a volunteer work program for sites/projects requiring interpretation;
- Volunteer groups to undertake environmental works such as site clearance and maintenance, trail construction and maintenance, wildlife surveys, etc.; and
- Environmental and cultural program "working holiday packages" for domestic and international tourism markets.

Rationale

The use of volunteers obviously reduces the cost of staffing in facilities and at sites and enhances the level of visitor service provided. Experience in other countries, (e.g., Scottish National Trust), shows that many volunteers bring previous work and professional experience thus strengthening the management and operational teams in protected areas and cultural sites. Local volunteers also increase local awareness of the ecotourism product and generating a sense of community "ownership". Volunteer programs to undertake environmental and cultural site operations is a growing niche market and can generate direct tourism income as well as subsidizing the cost of environmental and cultural operations and works. National and international experience continues to demonstrate that many volunteers have skills and experience that allow them to make contributions to project development and maintenance, education, interpretation, and operations.

Strategic Objective(s)

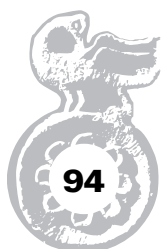
The implementation of the action will address the following objectives of the Strategy: 5.1.6

Anticipated Results

- Development of niche market;
- Increased public awareness of and engagement in ecotourism; and
- Enhanced visitor services

Activities

- Protected area staff, public cultural and nature sites, and facility managers, identify activities in which volunteer labor would be beneficial.
- Identify international best practices in volunteer management and training.
- Identify international niche markets for nature and cultural volunteer programs.
- Adapt international best practices to Bulgarian requirements.
- Train project and site supervisory staff from key sites and projects in volunteer management and training.



- Promote the concept of working holidays to local ecotourism businesses and develop packages. Include working holidays in tourism association marketing plans.
- Conduct several familiarization “volunteer programs” for key markets.

Illustrative Indicators

- Number of volunteer programs;
- Number of volunteers; and
- Estimated cost savings

Lead Agency/ Partners

Tourism associations, protected area administration, NEW Group, universities

Duration

Years 2 to 5

Funding Sources

Protected area and cultural site managers, their parent institutions, international volunteer programs, and donors

Marketing and Promotion

4.4.

It is important to determine how Bulgaria can position itself, particularly in its tourism markets, in a way that highlights its strength—emphasizing its natural and cultural assets. Many stakeholders argue that Bulgaria will gain much by combining its efforts with other countries in the region that have valuable natural and cultural resources, to become a major ecotourism center in southeastern Europe. This will put Bulgaria at the forefront of a broader and more diverse product, offering a broader mix of markets and market niches from which to draw. In the long run, investing in this role now will provide Bulgaria the foundation from which a vibrant regional ecotourism market can be developed and sustained.

“Positioning” is the process of crafting a message for the market. The more difficult task, given limited budgets and a crowded marketplace, is finding cost-effective ways to communicate that message. The following actions are designed to market and promote plans that demonstrate that each incremental dollar of funding yields considerable tourism revenue for the country.

The following action plans are presented under this action theme:

- Assist Regional Ecotourism Product Development;
- Develop “Ecotourism - Naturally Bulgaria” Niche Marketing Strategy;
- Establish Bulgaria Transnational Tour Operator Sustainability Initiative;
- Assist Domestic Ecotourism Products and Services Market Development; and
- Promote Ecotourism Market Diversification.



Description

Prepare regional ecotourism marketing plans containing, at a minimum, the following information and analyses as the basis for regional branding, identification of target markets, integration with national tourism marketing campaigns, and that serve as a guide for product development activities:

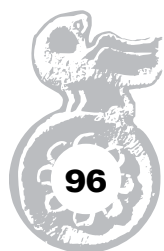
- Existing products identified by local clusters, major attractions and routes;
- Identification of regional branding opportunities based on natural and cultural heritage assets e.g., bird watching, WHO sites, network of mountain bike trails, etc.;
- Definition of regional brand compatible with national “Ecotourism - Naturally Bulgaria” theme;
- Current performance including visitor numbers by type and activity, overnight stays, and expenditure;
- Analysis of recent regional market trends;
- Analysis of the existing and potential tourism product demand in the region (internal and international);
- Identification of potential to generate growth within existing markets;
- Identification of target markets based on current product in domestic and international niche markets;
- Identification of opportunities to penetrate tourist concentrations in major tourist centers and resorts;
- Identification of necessary marketing materials, media and financial resources necessary; and
- An action plan to promote regional ecotourism destinations in target markets including national and international exhibitions and to national government institutions as component of national product

Rationale

To be successful and cost-effective, direct marketing activities must be targeted on areas of realizable potential and based on a realistic assessment of the product’s appeal and capacity. The ecotourism component (when developing national tourism marketing campaigns) is based on the aggregation of regional marketing plans and distinct brands, embraced within an overall theme. Detailed regional ecotourism marketing plans are, therefore, a fundamental requirement to raise Bulgaria’s profile internationally and generate visitors within the country’s ecotourism destination areas.

Strategic Objective(s)

The implementation of the action will address the following objectives of the Strategy: 5.2.1; 5.2.5; 5.2.7; 5.1.4



Anticipated Results

- Creation of national product comprising a range of defined regional brands; and
- Direct and collaborative penetration of target market.

Activities

- Define current product and market profiles for key regional ecotourism destinations.
- Identify the existing and potential demands of ecotourism products on the domestic and international as well as the visitors profiles.
- Define ecotourism product development relevant to the demand and the visitors profile and related to the main ecotourism destinations, centers and resorts.
- Define growth opportunities based on current, niche, domestic and major center/resort targets.
- Define regional ecotourism destination brands.
- Define materials and budgets necessary to realize destination marketing goals.
- Integrate results into national marketing plan via NEW Group.
- Update periodically in light of new products and opportunities.

Illustrative Indicators

Active participation in planned activities by all stakeholders.

Lead Agency/ Partners

Branch, product, regional and local tourism associations; private companies; and sustainable development associations.

Duration

2-year marketing cycle/elaborate over 5 years

Funding Sources

Donors, private businesses in Bulgaria and in the region



Develop “Ecotourism - Naturally Bulgaria” Niche Marketing Strategy

Description

Identify and use niche marketing strategies to target and communicate with the international, special interest travel segment, including: adventure travel, scientific, academic, volunteer and educational travel, health and fitness, and sports.

Rationale

Tourism development in Bulgaria has many, diverse, existing markets that can be capitalized on. To draw attention to this competitive advantage, branding the nation’s products and drawing attention to its ability to meet niche market demands should be a priority.

Strategic Objective(s)

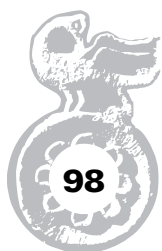
The implementation of the action will address the following objectives of the Strategy: 5.2; 5.3.2

Anticipated Results

An increasingly higher percentage of advertising and promotion resources will be devoted to niche marketing efforts as contrasted with general interest marketing. Effective strategies for identifying and communicating with the special interest travel markets will be tested and used.

Activities

- Participate in:
 - (a) specialized fairs focused on ecotourism and sustainable tourism themes;
 - (b) traditional national tourism fairs, which are developing workshops, conferences and other events focused sustainable tourism.
- Organize familiarization trips or travel workshops and invite wholesale tour operators to develop new packages based on equity and partnership in Bulgaria’s product centers.
- Use Internet marketing and individual websites to provide information. This includes on-line brochures, booking and reservation services and customized services tailored to individual or group needs. Pursue links with websites and organizations that match services for tour operators with sustainable product providers in collaborative relationships.
- Launch “Ecotourism-Naturally Bulgaria” as a major brand for this tourism segment in all Bulgarian advertising, promotion and public relations programs.
- Publish annual catalogues of “Naturally Bulgaria” products.



Illustrative Indicators

- Environmental sustainability standards reflected in marketing and promotion efforts;
- Use of “Ecotourism - Naturally Bulgaria” as a national tourism segment brand; and
- Number of exhibitors, presentations and visitors at niche fairs and exhibitions.

Lead Agency/ Partners

National Tourism Agency; tourism associations; private businesses; VISIT; and all state agencies, which organize presentations of the country abroad.

Duration

5 years

Funding Sources

GoB, private sector, NGOs, donors



Establish Bulgaria Transnational Tour Operator Sustainability Initiative

Rationale

Establish opportunities for international cooperation to allow Bulgarian tour operators to compare and test their existing packages and develop new partnerships with tour operators from major European and North American market generating countries who seek multiple destinations in Southeast Europe.

Strategic Objective(s)

The implementation of the action will address the following objectives of the Strategy: 5.2.1; 5.2.4; 5.3.8; 5.3.2

Anticipated Results

Enhanced reputation of Bulgaria and other countries in the region for providing quality tours and cross-border facilitation for organized tours.

Activities

- Involve local communities, private sector enterprises, NGOs, local municipalities and protected areas, national governments and international agencies in developing partnerships designed to expand or improve transborder trip circuits and tour packages.
- Involve responsible tour operators from originating countries through organizations such as the Association of Independent Tour Operators (www.aito.co.uk); Forum Anders Reisen (www.forum-anders-reisen.de), and the UNEP Tour Operators Initiative (TOI). Implement quality assurance processes using their operating guidelines and code of ethics for travelers, databases, and common promotion events.
- Offer a regional training program on sustainable tour operations and supply chain management in cooperation with the UNEP TOI and the World Heritage Center of UNESCO. Participants would include protected area site managers, local governmental and tourism organizations, hotelkeepers, ground transport operators, and TOI members—a network of tour operators dedicated to improving the sustainability of the tourism industry. In terms of proposing actions for network design, participants would discuss the concepts of creating a Protected Area and Tourism Advisory Group, developing interpretive programs, and introducing training and exchange programs for protected area guides. With regards to network implementation, participants discuss twinning strategies to promote less-visited sites; a passport program to encourage visits to multiple sites, shared marketing activities, and plans for visitor centers.
- Create an Internet-accessed database for tour operators and potential visitors seeking information on major protected areas in southeastern Europe - World Heritage Sites, national parks, cultural sites and monuments.



Illustrative Indicators

An international network on fair trade in tourism has been developed by Tourism Concern www.tourismconcern.org.uk. This organization promotes indicators focused on mutual beneficial and equitable partnership with local communities and service providers, fair wages and working conditions, and locally owned and operated businesses. These indicators would apply to this action plan.

Lead Agency/ Partners

NEW Group; REC; BATA; and BAAT

Duration

5 years

Funding Sources

Donors, private businesses



Assist Domestic Ecotourism Products and Services Market Development

Description

Increase the number of Bulgarians taking holidays, short breaks and day trips to ecotourism areas by focusing initially on the development of short break packages for visitors from major urban centers. Programs should also encourage links between regional providers and child/youth associations.

Rationale

The domestic ecotourism market in all countries is significant in that it can access the product easily, make multiple annual trips, and has much broader seasonality patterns than international tourism. This market segment can provide better opportunities for year-round business and can respond quickly to new products and events. Developing an associated transportation infrastructure can create an opportunity to generate substantial growth within the sector. The continuing development of the Bulgarian ecotourism product to international standards will provide the domestic market with a quality, low cost alternative to foreign holidays. The secondary focus on youth organizations recognizes both that young people have a greater awareness of and interest in environmental issues and also represents a market for activities such as outdoor centers, adventure camps, etc. Their accommodation and service requirements are less sophisticated than for adult markets, thus providing a market for less developed products.

Strategic Objective(s)

The implementation of the action will address the following objectives of the Strategy: 5.2.5; 5.2.7

Anticipated Results

- Increase in domestic day trips and overnight stays;
- Extension of operational season; and
- Entry-level market for less developed products.

Activities

- Develop short break packages between urban tourists, businesses, protected areas, and site managers in regional and local ecotourism business growth centers/clusters, in cooperation with tour operators.
- Develop child/youth outdoor educational programs, initially by national parks and protected areas, in association with schools and youth organizations.
- Generate a public marketing campaign to inform national audiences and key national target groups of opportunities for ecotourism holidays/leisure travel.



Illustrative Indicators

- Domestic visitor expenditure;
- Number of trips and duration; and
- Number of youth-oriented outdoor centers.

**Lead Agency/
Partners**

NEW Group, tourism associations, tour operators and tourism agencies, and tourism information centers.

Duration

Develop packages and education programs in Year 2 based on existing product resources; final assembly of ecotourism campaign and marketing in Year 3.

Funding Sources

Private investment, donors



Description

Create day trip and short break holidays for tourists from major resort complexes.

Rationale

The tourist concentrations in Black Sea and ski resorts comprise a significant and readily accessible existing market. Tour operator companies in resort complexes are well developed (e.g., trained staff, trip organization, marketing and links with international tour operators). Partnership arrangements with these tour operators will enable rural ecotourism clusters to generate increased business levels rapidly with relatively minor requirements to develop local marketing and organizational capacity. In addition, these partnerships will allow resorts to offer a wider range of activities and broaden their market appeal and opportunity to market additional events, cultural opportunities and social responsibility. Major tourism companies are also potential sources of investment in product and facility development where current provision falls short of visitor expectations.

Strategic Objective(s)

The implementation of the action will address the following objectives of the Strategy: 5.2.1; 5.2.2

Anticipated Results

- Increased local visitation and visitor expenditure;
- Extension of resort operational seasons, and increased/longer periods of employment; and
- Increased resort occupancy.

Activities

- Identify ecotourism product clusters with relatively easy access to mass tourism centers.
- Initiate contact with resort management companies and major providers within them.
- Jointly identify potential demand and visitor profiles.
- Develop ecotourism product packages matching demand and visitor profiles.
- Extend successful packages and approaches to less developed ecotourism clusters.
- Advise local businesses on acceptable contractual arrangements.

Illustrative Indicators

- Local visitor numbers and expenditure;
- Number of packages; and
- Numbers and percentage of resort tourists buying packages.



**Lead Agency/
Partners**

Tourism associations, protected area administrations, private business, and tourism information centers.

Duration

Develop contacts, maintain dialogue and conduct demand and profile studies in Year 1; first packages operational in Year 2; Direct resort investments in Year 3 onwards; and packages extended into other ecotourism destination areas in Years 4 and 5.

**Funding
Sources**

Private investment, mobilizing local resources

Human Resource Development and Training**4.5.**

There are a number of other critical components that help to define a world class, ecotourism product besides the tourist attractions and activities, the most important of which is the quality and levels of service. A comprehensive ecotourism human resource development and training strategy needs to focus on:

- (a) raising service levels to meet current visitor demands and, eventually, to support development of higher spending market segments;
- (b) involving the private sector in curriculum design and provision of practical training opportunities;
- (c) promoting greater awareness of the importance of tourism, and support within the broader community for sustainable tourism growth;
- (d) improving the image of tourism as a career path for graduates;
- (e) expanding the capacity of colleges and universities to include sustainable tourism in their curriculum, and to improve the overall quality of their degree programs; and
- (f) upgrading knowledge and competencies in managing local and regional tourism organizations.

The following action plans are presented under this theme:

- Develop a SME Ecotourism Development Training Program;
- Create an Ecotourism Destination Management Training Certificate;
- Adapt SuperHost Customer Service Program to Bulgaria;
- Create an Ecotourism Guide Certificate;
- Develop a Tourism Interpretation Design and Implementation Training Program; and
- Establish a University-Level Ecotourism and Sustainability Initiative.



Description

Develop a comprehensive national package of training courses deliverable locally covering:

- Market analysis and forecasting,
- Product development,
- Marketing,
- Small business management,
- Business planning,
- Funding sources and criteria for funding,
- Credit applications,
- Compliance with accreditation requirements,
- Customer servicing,
- Monitoring,
- Health and safety, and
- IT technologies. Successful programs for SME capacity building and startups are well established in a number of countries. The selection of transferable models and their adaptation to Bulgarian needs will accelerate the development and implementation of this program in the country.

Rationale

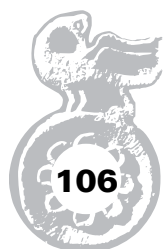
To overcome endemic gaps in ecotourism service skills within the ecotourism SME segment and in rural businesses overall. To meet and satisfy the demand for such courses.

**Strategic
Objective(s)**

The implementation of the action will address the following objectives of the Strategy: 5.2.2

**Anticipated
Results**

- Better quality of business plans;
- Increased investment in the sector;
- Higher growth rates and profitability.



Activities

- Select appropriate models of best practices in tourism/ecotourism SME training.
- Develop integrated, modular SME development course.
- Generate course materials.
- Train trainers.
- Promote program via tourism agencies, associations and business advisory centers.
- Deliver program in major regional and municipal business advisory centers.
- Develop manual of good practices for beginners in the business.

Illustrative Indicators

- Number of courses delivered;
- Attendance at courses; and
- SME satisfaction via course appraisal questionnaires.

Lead Agency/ Partners

NEW Group, National Tourism Training Council, universities and colleges, tourism associations, private businesses, Ministry of Economy, Ministry of Education and Science, and National Business Development Network Association.

Duration

Develop course modules in Year 1; train trainers and begin delivery in Year 2

Funding Sources

Donors, EU-Sixth Framework Training Program



Create an Ecotourism Destination Management Training Certificate

Description

Develop and conduct a training program for staff of tourism associations, local authorities, government authorities, Bulgarian Tourism Union. Develop operating ecotourism programs at the local or regional destination levels.

Rationale

Rural tourism leaders need a sound understanding of ecotourism from the realistic perspective of demand and supply, including analysis, product development, and marketing tools used in destination management.

Strategic Objective(s)

The implementation of the action will address the following objectives of the Strategy: 5.2.1; 5.2.2; 5.4

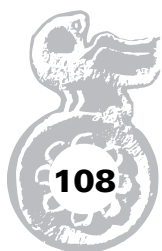
Anticipated Results

This training program is designed to be the first stage in a learning process leading to the acquisition of destination management skills and competencies (territorial organization, planning and management), such as:

- Understanding the functions and disciplines that are the foundation of a destination management organization (DMO);
- Acquisition of personal skills and insights to implement strategies through people;
- Capacity to be innovative, entrepreneurial, action orientated and confident in making decisions; and
- Ability to develop teams where success will depend on creating implementation actions that are quality focused.

Activities

- Design training program using tested training courses, and translate into the Bulgarian language.
- Develop certificate training delivery system using a blend of courses delivered at convenient locations with mediated leaning using a distance education platform.
- Pilot test certificate program using Bulgarian and international expert trainers.
- A train-the-trainer program will be conducted with a cross-section of trainees from the national, regional and local levels who will be enrolled in the first Ecotourism Certificate Program. Trainers will be selected from existing university and training institutions, etc., in Bulgaria. The program will cover the theoretical concepts of defining competency, identifying effective assessment tools and meth-



ods, gathering evidence, learning to make assessment decisions, training-the train-er activities, etc.

- Evaluate and make improvements to the program using the pilot results.
- Develop institutional arrangements with a university or training institution to manage the training program.

Illustrative Indicators

Test scores, completion rates, documented performance on the job.

Lead Agency/ Partners

National Tourism Training Agency/George Washington University, and other Bulgarian and foreign universities and colleges; Ministry of Education and Science; Ministry of Economy; tourism associations; and Foundation for Local Government Reform.

Duration

3 years

Funding Sources

Donor, tuition and fees, SAPARD, EU



Adapt SuperHost Customer Service Program to Bulgaria

Description

Adapt SuperHost for use in Bulgaria. (SuperHost is a customer service-training program for employees in small tourism enterprises, emphasizing the value of face-to-face interactions between employees and guests.)

Rationale

SuperHost was first introduced in 1985 to prepare British Columbia's (BC) tourism workforce to host the world at Expo '86. Since then, over 300,000 British Columbians have participated in SuperHost training programs and helped to establish BC's international reputation for service. The program's excellence is recognized internationally. American Express selected SuperHost as its customer service training program for 10 Asian countries. Tourism agencies in England, Wales, Scotland, New Zealand, Australia, Alaska, Ontario, New Brunswick, Nova Scotia, Prince Edward Island and Newfoundland also have the license rights for SuperHost.

Strategic Objective(s)

The implementation of the action will address the following objectives of the Strategy: 5.2.2

Anticipated Results

Super Host can lead to dramatic improvement in the quality of services accompanied by increased recognition of the important role that employees in the (eco) tourism sector play in providing friendly, informative, and courteous interactions with visitors.

Activities

- Conduct SuperHost workshops customized to meet Bulgaria's needs, and to include:
 - *Fundamentals*: This workshop addresses the fundamentals of excellent customer service with a focus on the practical application of tools and techniques;
 - *European Service Expectations*: Europeans are Bulgaria's largest market, and this workshop provides participants with a better understanding of the needs, preferences and expectations of this valuable market segment;
 - *Customers with Disabilities*: Designed to increase participants' awareness about this growing market segment, this workshop assists participants to provide superior service while respecting every visitor's unique requirements; and
 - *Service Across Cultures*: Participants gain an improved understanding of the diverse cultures that comprise Bulgaria's international tourism.



- Deliver workshops that use a 'hands-on' approach to exploring tips and techniques for excellent service. Interactive learner centered techniques are utilized, including role-playing and group work. The trainer's role is to work as a 'guide on the side' with the group to deliver an energizing and enjoyable workshop.
- Create and support a Community Delivery Network, targeting small (micro and very small) tourism businesses in rural areas. Participating organizations have strong ties to the local business community, ensuring that the program reaches this market effectively.
- Develop an Operations Guide for participating organizations. This includes ongoing certification requirements for trainers, periodical monitoring of workshop delivery to ensure the quality and consistency of program delivery.
- Replicate certificate programs in secondary and post-secondary education institutions; SuperHost is delivered by teachers in secondary school and career preparation (vocational) programs.

Illustrative Indicators

- Participants and employers feedback on SuperHost training, including referrals and recommendations of the SuperHost workshop to co-workers;
- Acquisition of a new customer service technique(s) that are used on return to their place of work;
- Supervisor reports on improvement in morale and service levels after the workshop(s); and
- Visitor satisfaction surveys.

Lead Agency/ Partners

Ministry of Education and Science, Ministry of Economy, tourism associations, and National Business Development Network Association.

Duration

5 years

Funding Sources

Donors-CIDA and American Express, other donors and private sector agencies



Description

Create an ecotourism guide program according to the specific requirements of the Tourism Act, for professional guides including:

- Environmental knowledge and awareness
- Outdoor skills,
- Interpretation of ecotourism themes,
- Foreign languages,
- Volunteer training, and
- Visitor safety. This qualification will also provide a career development opportunity for specialized guides and protected area rangers.

Rationale

Ecotourism lends itself to interpretation via human guides, especially where extensive interpretative signs would be intrusive and impractical. In addition, the ecotourism market includes a segment of highly knowledgeable, specialist tourists for whom more basic, general interpretation would be insufficient for their needs.

Strategic Objective(s)

The implementation of the action will address the following objectives of the Strategy: 5.2.2

Anticipated Results

- Development of recognized national, formal certificate course;
- Cadre of trained ecotourism guides; and
- Value-added visitor experience.

Activities

- Identify “best practice” models, existing schools and training centers.
- Adapt certificate courses to national needs.
- Identify awarding institutions.
- Develop course and materials.
- Conduct certificate courses and publicize certificate holders and program throughout the region.



Illustrative Indicators

- Number of trainees and trained employed guides; and
- Number of certificates awarded.

Lead Agency/ Partners

National Sports Academy, Bulgarian Tourism Union, Ministry of Youth and Sports, Ministry of Economy, Ministry of Education and Science, BAAT, NEW Group, National Tourism Training Council, and professional training centers

Duration

Years 3 to 5

Funding Sources

Donors, interested tourism associations, private business



Develop Tourism Interpretation Design and Implementation Training Program

Description

Introduce courses that develop the role of interpreters and interpretation in natural and cultural heritage sites as a major component of ecotourism development in the country. The course will be designed for ecotourism operators, protected area managers, education officers within protected areas, ecotourism and tourism planners and policymakers, and tourism decision makers. The courses will address:

- The role of interpretation in natural and cultural heritage sites;
- The relevance of interpretation approaches to different visitor niches;
- The theoretical underpinnings of ecotourism interpretation;
- Current tourism management issues that surround interpretation at natural and cultural sites;
- Interpretation planning, design and evaluation of interpretation programs;
- Strategic planning, target audiences definition, and site assessment;
- Content issues and communication techniques;
- Understanding interpretation and value adding of the tourist product;
- Including the marketing of ecotourism products; and
- The role of interpretation centers in the contexts of ecotourism and product development. A number of well-designed interpretation courses covering these topics already exist, and could be adapted to Bulgaria.

Rationale

Ecotourism interpretation tends to be factual and dry in Bulgaria. This academic approach reduces interest to the general and younger visitors. The course will enable entrepreneurs and ecotourism management staff to understand the importance of storytelling techniques and assist in the creation of more compelling, dynamic visitor center interpretation.

Strategic Objective(s)

The implementation of the action will address the following objectives of the Strategy: 5.2.6

Anticipated Results

- Increased visitation;
- Increased visitor awareness;
- More cost effective interpretation design; and
- Reduced visitor impact and higher visitor satisfaction.



Activities

- Review and assess specific interpretation needs for each protected area and site, and for other tourist destination natural areas.
- Develop regional ecotourism destination interpretation “schemes” for sites, events.
- Identify and support development of training institution/program for interpretative training.
- Develop training curricula and certification program with a focus on train-the-trainers program.
- Market courses and implement training program.
- Replicate program for Bulgarian and regional interpreters.

Illustrative Indicators

- Number of attendees;
- Number of certificates; and
- Number of sites serviced by interpreters.

Lead Agency/ Partners

Protected area administrations, private business (tourism companies and professional training centers), tourism associations, educational institutions, NNPS, Ministry of Culture, Ministry of Education and Science, and Ministry of Economy.

Duration

Years 2 to 5

Funding Sources

Donors, PAF



Establish University-Level Ecotourism and Sustainability Initiative

Description

Supplement the curricula of universities and colleges offering education in tourism and hospitality with ecotourism topics. Support research focused on ecotourism and sustainable tourism principles and practices.

Rationale

Although some Bulgarian universities have started to focus on ecotourism and sustainable tourism themes, “lessons learned” from other universities worldwide should be applied in Bulgaria. The World Tourism Organization’s (WTO) Human Resource Department and Education Council can provide immediate and appropriate assistance through the Ministry of Economy or other institutions or organizations.

Strategic Objective(s)

The implementation of the action will address the following objectives of the Strategy: 5.2.2; 5.3.7

Anticipated Results

- Curriculum improvements;
- Better-prepared graduates;
- Applied research initiatives associated with universities are linked to assistance for local communities engaged in the assessment of the impacts of ecotourism; and
- Bulgarian universities collaborate with major international universities in ecotourism and sustainable tourism.

Activities

- Offer a “TEDQUAL” seminar for Bulgarian universities in collaboration with the WTO.
- Plan and conduct a series of a curriculum enhancement workshops focused on integrating sustainability principles and practices into exiting tourism and hospitality curricula using WTO and Business Enterprise for Sustainable Tourism (BEST) curriculum modules.
- Assist Bulgarian universities in obtaining “TEDQUAL” certification from WTO including capacity-building activities, joining WTO’s Education Council, and facilitating the TEDQUAL audit process.
- Involve Bulgarian universities in other training programs described in other ecotourism/sustainable tourism human resource development and training action plans, with a particular focus on European models and practices.



Illustrative Indicators

- Enhanced curricula and courses offered reflecting ecotourism, and sustainability concepts;
- Student enrollment and placement;
- TEDQUAL-certified institutions; and
- Applied research projects related to ecotourism impacts.

Lead Agency/ Partners

National Tourism Training Council, Ministry of Education and Science, and Ministry of Economy.

Duration

5 years

Funding Sources

WTO for TEDQUAL Seminars, CIDA, key international universities, Leonardus Program

Institutional Development

4.6.

The implementation of NETS requires an organizational framework, nationally linking all stakeholders from microbusinesses in remote areas to government ministries. Some elements of this framework exist but require strengthening and extension; specifically this includes both regional and local tourism associations. Other elements are missing, including a national, formally recognized advisory and coordinating body. (This is addressed through the new operational mechanism within the government, and is known as the National Ecotourism Working (NEW) Group.) In addition, some existing organizations require capacity building to fulfill their required functions, which could be addressed by the development and/or support of local business advisory centers, who would deliver business advice and training.

The following action plans are presented under this theme:

- Build National Ecotourism Working (NEW) Group Capacity;
- Create an Ecotourism Advisory Services Network;
- Strengthen and Replicate Ecotourism Development Programs in Protected Areas, Other Attractive Natural Areas and Municipalities;
- Incorporate Ecotourism Strategies in Regional and Municipal Development Plans;
- Establish a Federation of Regional Tourism Associations (RTAs);
- Enhance Regional and Local Tourism Associations; and
- Define Limits of Acceptable Change (LAC) for Cultural and Natural Sites



Description

Build the capacity of the NEW Group as a formally recognized institution to perform the following functions:

- Secure the final steps in the review and approval of the National Ecotourism Strategy and Action Plan (NETSAP).
- Coordinate the implementation of NETSAP during the next five years.
- Conduct annual review and assessment of the implementation of NETSAP and update its content.
- Support information exchange within the framework of ecotourism networks.
- Ensure the presence of Bulgaria in international ecotourism networks.

Rationale

The national importance of ecotourism as a segment of the national sustainable tourism strategy, as well as in national rural development strategies, needs to be represented directly and institutionally within the national policy development framework.

**Strategic
Objective(s)**

The implementation of the action will address the following objectives of the Strategy: 5.3.1

**Anticipated
Results**

National Tourism Council/Ministry of Economy approval of the structure, mandate, budget and functions of the NEW Group. Similar formalization of its relationship to the National Tourism Agency.

Activities

- Existing NETS working groups formulate proposal for approval by the National Tourism Council (NTC).
- Finalize NEW Group memorandum and articles.
- Appoint members and “operationalize” roles and responsibilities.



Illustrative Indicators

Establishment of NEW Group: approved functions and budgets, projects that are supervised, monitored and reported within the Group's mandate.

Lead Agency/ Partners

NTC, NEW Group

Duration

Finalize and appoint members beginning Year 1; ongoing capacity-building activities in Years 2-5.

Funding Sources

GoB, donors, interested associations



Description

Create a network of national and international specialist advisors to assist the NETSAP stakeholders to undertake their allotted actions. The NEW Group will conduct a technical needs assessment as a priority and amalgamate these as the basis for a technical assistance program that can be supported by donor agencies.

Rationale

It is important for lead agencies and partner organizations to identify and secure special and/or specific technical expertise in the implementation of this Action Plan. Strategic injections of expert technical assistance should address gaps in knowledge, skills, and experience.

Strategic Objective(s)

The implementation of the action will address the following objectives of the Strategy: 5.2.6; 5.4

Anticipated Results

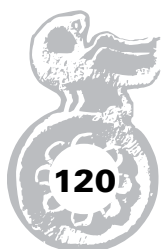
Creation of technical assistance support team.

Activities

- Conduct or secure assistance to conduct needs assessment.
- Generate terms of reference to address gaps arising between the NETSAP and the expertise needed to complete it over the next five years.
- Amalgamate needs assessment and terms of reference into technical assistance project proposal.
- Apply for funding assistance to donor programs;
- Identify and form ecotourism advisory services and attach Bulgarian counterparts to each assignment.
- Provide an annual report on technical assistance schedule and outputs.

Illustrative Indicators

- Resource identified and being used on a consistent basis;
- Funding secured;
- Operational costs of maintaining the network are self-sustaining after the end of Year 5.



**Lead Agency/
Partners**

Tourism associations, NEW Group

Duration

Year 1

**Funding
Sources**

SAPARD-TA; other donors



Strengthen and Replicate Ecotourism Development Program in Protected Areas, Other Attractive Natural Areas, and Municipalities

Description

Strengthen and replicate community-based ecotourism developed in partnership with protected areas, other natural areas, cultural sites, and municipalities in target destinations.

Rationale

This program meets three concurrent goals using sustainable principles and practices:

- (1) biodiversity and cultural conservation—protecting natural and cultural resources;
- (2) poverty reduction through micro and small enterprise development, job creation, and social equity measures; and
- (3) business viability through better access to capital, returns on investment, and profitability.

Strategic Objective(s)

The implementation of the action will address the following objectives of the Strategy: 5.4.1; 5.4.2; 5.4.3; 5.4.4

Anticipated Results

Ecotourism destination management capacity linked to protected area sites will be expanded at the community level. This approach will foster ownership among direct stakeholders, and also throughout the community in general.

Activities

- Assist communities in the development of a vision and strategic plan for developing tourism and ecotourism in their area.
- Use benchmarks from Bulgaria and internationally (e.g., product clubs) focused on successful ecotourism practices and link to protected areas with surrounding communities.
- Develop “competitive clusters” linking ecotourism to protected areas. The protected area ecotourism cluster links market demand to core services focused on meeting the needs of specific market segments (ecotourism clients). Businesses, infrastructure representatives, training resource groups, and support services will form an Ecotourism Initiative Group (EIG). In addition, EIGs will include local municipality representatives, NGOs, and protected area representatives.
- Entrepreneurs from the EIGs will participate in product development and business planning activities, informed by the results of ongoing market intelligence on national and international ecotourism markets.



- Local EIGs will:
 - (a) create, together with tour operators, new tourism products and support the development of established and emerging regional, national and transnational ecotourism circuits;
 - (b) encourage community control of projects and development—communities will be directly engaged in the approval process and allocation of benefits;
 - (c) encourage tourism development as a way of conserving and protecting the environment;
 - (d) target specialty markets versus mass markets, involving environmentally sensitive consumers in a process of learning and interaction with communities;
 - (e) embrace new information technologies to improve marketing and communications; and
 - (f) develop and monitor a set of impact and success indicators, using manual and data collection tools developed and piloted by the University of Sofia.
- Develop local visitor and interpretation infrastructure in protected areas and other natural areas as partnership projects between protected area management and local communities.

Illustrative Indicators

- Equity for expansion and operations;
- New tour packages created;
- Registered tourism establishments;
- Available rooms and overnight stays;
- Tourist visitation over all four seasons;
- Formation of village visitor centers and collaborative activities with other functions;
- Formalization (registration) of ecotourism association or sustainable tourism associations;
- Conduct of “special events” involving local stakeholders and visitors;
- Development of new products and attractions; and
- Use of quality assurance programs and branding concepts.

Lead Agency/ Partners

Protected areas administration, tourism associations, Ministry of Labor and Social Policy, Ministry of Regional Development and Public Works, Foundation for Local Government Reform, and PLEDGE program.

Duration

5 years

Funding Sources

PHARE, World Bank/GEF, UNDP/GEF



Incorporate Ecotourism Strategies in Regional and Municipal Development Plans

Description

Ensure that local and regional administration policies reflect the needs and priorities of the ecotourism sector. This includes:

- Infrastructure development;
- Local decrees and other regulation development within the competences of the municipalities and municipal councils and regional administrations, encouragement of ecotourism development;
- Planning and zoning regulations, including Limits of Acceptable Change;
- Local business incentives;
- Business advisory services; and
- Environmental protection enforcement. To move this concept of integrated planning forward, regional and local tourism associations will include, within their membership, senior representation from local governments as stakeholders in their own right.

Rationale

Local government policies and practices affect ecotourism development activities at all levels. Rather than tackle ecotourism development issues on a piecemeal basis, it is more cost and time-effective to identify them collectively as part of the regional and municipal development process. It is also a more effective way of securing the allocation of local resources towards the achievement of ecotourism objectives.

Strategic Objective(s)

The implementation of the action will address the following objectives of the Strategy: 5.4

Anticipated Results

- Integrated development process;
- Removal of barriers to ecotourism development;
- Acceleration of ecotourism development process;
- Enhancement of the overall product;
- Infrastructure improvement more closely linked with ecotourism needs and objectives; and
- Local revenue generation and expenditures more closely linked with ecotourism enterprise development.



Activities

- NEW Group develops guidelines and services to assist all regional and participating municipal administrations to engage in strategic ecotourism planning with local and regional ecotourism associations, and other partners, when the initiative is undertaken.
- Regional and local tourism associations identify areas in which local government policies and practices impinge or accelerate their activities.
- Identify issues and prepare solutions within ecotourism development plans.
- Present ecotourism development plans to local and regional administrations as part of the regular development planning cycle.

Illustrative Indicators

Number of municipalities and regions with identifiable ecotourism development components within their development plans.

Lead Agency/ Partners

National Association of Municipalities in the Republic of Bulgaria, Foundation for Local Government Reform, Ministry of Regional Development and Public Works, tourism associations, and National Sustainable Development Association's "Good Alternatives".

Duration

Years 2 to 5

Funding Sources

Local governments, FLGR, GoB



Establish a Federation of Regional Tourism Associations (RTAs)

Description

Establish a formal Federation of RTAs to:

- Act as a coordinating body between regions/ecotourism destinations;
- Facilitate interregional contacts and cross-regional cluster development;
- Represent RTA interests in the NEW Group and other government bodies;
- Facilitate and advise on the formation of new RTAs in regions where they do not exist;
- Advise NTC and ministries on tourism/ecotourism issues common to regions; and
- Liaise with the NEW Group on national and regional annual ecotourism fairs and conferences.

Rationale

Many common ecotourism development problems and needs affect all, or groups of, regions in Bulgaria. Collective lobbying for the resolution of these will be more effective than separate efforts. The establishment of new RTAs can be most effectively facilitated using the collective, detailed experience of existing ones. This collaborative, peer group approach will also further strengthen interregional links.

Strategic Objective(s)

The implementation of the action will address the following objectives of the Strategy: 5.4

Anticipated Results

- Establishment of a Federation of RTAs formally represented in the NEW Group; and
- Extension of RTA network to cover whole nation.

Activities

Existing RTAs to establish a joint federation with memorandum and articles reflecting the above functions.



Illustrative Indicators

- Number of operational RTAs; and
- Number of RTA members.

**Lead Agency/
Partners**

RTAs

Duration

Year 1

Funding Sources

Donors



Description

Create a national network of regional and local bodies representing stakeholders at all levels as a means of:

- Stimulating ecotourism cluster development;
- Identifying common ecotourism issues and solutions e.g., infrastructure;
- Developing local marketing and product development plans;
- Stimulating Business to Business (B2B) and interregional activities;
- Providing a vehicle for cross-sector development, e.g., cultural tourism and ecotourism;
- Exchanging experiences and best practices;
- Influencing local government policies and ensuring tourism development plans are integrated into regional and municipal plans; and
- Providing a vehicle for community consultation, conflict mediation, and lobbying. Each tourism association will have an “Ecotourism Working Group” with key representation from municipal or regional governments.

Rationale

All stakeholders in the NETS process have identified the need for communications and co-ordination networks as a necessary foundation for local marketing, product development, resource allocation, lobbying, and policy development. These are not specific to ecotourism, but to tourism in general. Local tourism associations will probably be dominated however, by ecotourism themes because of their applicability to rural and local municipal conditions.

Strategic Objective(s)

The implementation of the action will address the following objectives of the Strategy: 5.4; 5.2

Anticipated Results

Integrated national network of tourist associations with ecotourism working groups.

Activities

- Identify key local stakeholders and existing local associations through RTAs.
- RTAs conduct public awareness and orientation seminars for local associations and interested parties.
- Federation of RTAs form working groups with key local associations to develop guidelines for the formation of new, local tourism associations.



- RTAs provide peer support and advisory services to local associations through formation and planning.
- The federation will develop and maintain network maintenance tools (e.g., newsletters, periodical conferences, etc.), and the network will provide technical assistance.

Illustrative Indicators

- Number of new associations;
- National coverage;
- Number of active members; and
- Technical assistance provided through associations.

Lead Agency/ Partners

NEW Group, RTAs

Duration

Years 1 to 5

Funding Sources

Donors



Define Limits of Acceptable Change (LAC) for Cultural and Natural Sites

Description

Define and apply guidelines to establish the scale and type of development acceptable in individual environmentally sensitive areas. A growing body of information is being developed in protected areas on LACs/limits of acceptable use. These should be adapted and applied on national and local levels for all protected areas, key sites and areas surrounding protected areas, cultural monuments and other nondesignated sensitive sites. These limits should be incorporated into municipal development plans.

Rationale

It is fundamental to the development of a sustainable (eco) tourism product that physical development and related visitor impact is controlled and directed both to preserve the quality and character of the areas and avoid over-training infrastructure. The concomitant identification of areas suitable for more intensive tourism development will aid the development of ecotourism cluster groups and destinations.

Strategic Objective(s)

The implementation of the action will address the following objectives of the Strategy: 5.1; 5.2.9

Anticipated Results

- Conservation and preservation of sensitive areas and sites;
- Creation of localized cluster groups and tourist destinations;
- Local groups actively participating in the enforcement of limits.

Activities

- Identify and adapt international and national experience with LAC/limits of acceptable use guidelines.
- Consult with local and regional ecotourism stakeholders to identify priority areas for their application.
- Produce, distribute and orient planners to national guidelines on limits.
- Integrate LAC guidelines into municipal development plans in identified areas.

Illustrative Indicators

- Reduction in development pressure in sensitive areas; and
- Adoption and enforcement by municipalities and protected areas.

Lead Agency/Partners

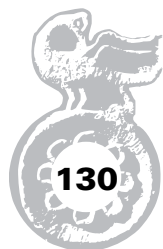
Ministry of Environment and Waters and Ministry of Culture.

Duration

Adoption of guidelines in Year 1; consultation and priority identification in Year 2; and adoption by municipalities by Year 4.

Funding Sources

GoB, PAF, National Enterprise Fund



No	Action	Leading Agency/ Partner	Required Funds in 1000 BGN					Potential Sources of Financing	
			TOTAL	2004	2005	2006	2007		2008
Information Management									
1.	Create an Ecotourism “Best Practices” Internet Portal	Executive Tourism Agency and the Ministry of Economy, with support and assistance from the Foundation for Local Government Reform; Ministry of Environment and Waters; Ministry of Agriculture and Forests; Ministry of Culture; Branch, product, regional and local tourism associations; Bulgarian Tourism Union; National Sustainable Development Association’s “Good Alternatives”	790.00	100.00	600.00	30.00	30.00	30.00	GoB, SAPARD, international donors
2.	Develop a Digital Library of Ecotourism Media Resources	Executive Tourism Agency; Ministry of Economy; Ministry of Environment and Waters; Ministry of Agriculture and Forests; Ministry of Culture; local, regional, product and branch tourism organizations; Ministry of Regional Development and Public Works; Ministry of Education; Bulgarian Tourism Union	300.00		300.00				GoB, NGOs through materials obtained through implementing projects





No	Action	Leading Agency/ Partner	Required Funds in 1000 BGN						Potential Sources of Financing
			TOTAL	2004	2005	2006	2007	2008	
3.	Include Ecotourism Data Collection in Tourism Data Collection	Ministry of Economy; National, regional and local tourism associations; Ministry of Environment and Waters, Ministry of Agriculture and Forests, Ministry of Culture, Bulgarian Tourism Union, etc.	300.00	50.00	200.00	50.00	30.00	30.00	GoB, all sources funding ecotourism projects
4.	Design an Ecotourism Information Management System	Ministry of Economy; Ministry of Environment and Waters; Ministry of Agriculture and Forests; national, regional and local tourism associations and information centers; Ministry of Culture	600.00	50.00	350.00	200.00			GoB, international donors, NGO sector
5.	Populate the Ecotourism Information Management System	Executive Tourism Agency, Ministry of Economy, Ministry of Environment and Waters, Ministry of Agriculture and Forests, tourism associations	45.00	10.00	15.00	20.00			GoB, international donors, tourism associations, private sector
6.	Create and Implement a National Signs Standard	NEW Group; Ministry of Economy; Ministry of Environment and Waters; Ministry of Agriculture and Forests; protected area administrations; tourism associations; Ministry of Culture; Bulgarian Tourism Union; Road Agency; and Ministry of Youth and Sports	190.00	30.00	80.00	80.00			GoB, all funding sources
Total for Information Management			2225.00						

No	Action	Leading Agency/ Partner	Required Funds in 1000 BGN						Potential Sources of Financing
			TOTAL	2004	2005	2006	2007	2008	
Ecotourism Enterprise Development									
7.	Develop and Operate Ecotourism Business Growth Centers	Small and Medium Enterprise Agency; National Association of the Municipalities in the Republic of Bulgaria; Foundation for Local Government Reform; National Business Development Network Association; Ministry of Labor and Social Policy; Ministry of Economy; Executive Tourism Agency; tourism associations; regional municipal associations; local authorities	550.00	50.00	150.00	150.00	150.00	50.00	UNDP/Ministry of Labor and Social Policy– JOBS Program and other donors, GoB
8.	Provide Ecotourism Business Advisory Services	Small and Medium Enterprise Agency; National Association of Municipalities in the Republic of Bulgaria; Foundation for Local Government Reform; NEW Group; National Business Development Network Association; tourism associations	200.00		50.00	50.00	50.00	50.00	Donors
9.	Create Ecotourism Financial Incentive Mechanisms	Ministry of Economy; Ministry of Environment and Waters; Ministry of Agriculture and Forests; National Business Development Network Association; national, regional and local tourism associations; local governments; National Association of Municipalities in the Republic of Bulgaria; NEW Group	6450.00	1250.00	1300.00	1350.00	1300.00	1250.00	GoB, Donors





No	Action	Leading Agency/ Partner	Required Funds in 1000 BGN						Potential Sources of Financing
			TOTAL	2004	2005	2006	2007	2008	
10.	Assist Small Ecotourism Enterprise (Accommodation) Development	Bulgarian Association of Hotel and Restaurant Keepers; tourism associations; Ministry of Environment and Waters; Executive Tourism Agency; Ministry of Economy; local municipalities; private sector partners; Bulgarian Tourism Union	1050.00	100.00	200.00	250.00	250.00	250.00	Donors, interested associations, private business
11.	Develop and Support Capital Markets and Mechanisms for Ecotourism	NEW Group; business associations; chambers of commerce; investors' associations	300.00	100.00	100.00	100.00			Donors, interested associations, private business
Total for Ecotourism Enterprise Development			8550.00						
Product Development and Quality Assurance									
12.	Create "Ecotourism - Naturally Bulgaria" Awards	NEW Group; tourism associations; Ministry of Economy; Ministry of Environment and Waters; Ministry of Agriculture and Forests; Ministry of Culture; Bulgarian Tourism Union; Ministry of Youth and Sports; and Ministry of Regional Development and Public Works	150.00	50.00	50.00	50.00			GoB, NGOs, business associations, matched with private sponsors
13.	Develop a Tourism Information Network (TIN)	Regional, local, product and branch tourism associations; National Association of Municipalities in the Republic of Bulgaria; Executive Tourism Agency; Ministry of Economy; protected area administrations; cultural site managers; municipal authorities; and other ministries that have information centers throughout the country—Ministry of Agriculture and Forests, Ministry of Environment and Culture, Ministry of Youth and Sports, Ministry of Culture, and Bulgarian Tourism Union	600.00	50.00	200.00	150.00	150.00	50.00	Local authorities and local entrepreneurs, GoB, donors, business associations

No	Action	Leading Agency/ Partner	Required Funds in 1000 BGN					Potential Sources of Financing	
			TOTAL	2004	2005	2006	2007		2008
14.	Promote Community Events and Traditional Celebrations	NEW Group, Ministry of Culture, Ministry of Economy, Executive Tourism Agency, tourism associations, tour operators, local NGOs	250.00	50.00	50.00	50.00	50.00	50.00	Donors, mobilization of local resources
15.	Pilot an Ecodge Network	Tourism associations; business associations; Bulgarian Hotel- and Restaurant-Keeper Association; Ministry of Environment and Waters; Ministry of Economy	450.00	50.00	100.00	100.00	100.00	100.00	Private sector investment, donors
16.	Plan and Develop a Protected Area Eco-Chalet System	Bulgarian Tourism Union, Ministry of Environment and Waters/Ministry of Agriculture and Forests, Ministry of Youth and Sports	1350.00	50.00	100.00	200.00	500.00	500.00	Donors, private investments
17.	Support Ecotourism Products and Services Quality Assurance Certification	NEW Group; branch, product, regional and local tourism associations; protected area administrations; Ministry of Environment and Waters; Ministry of Agriculture and Forests; and Ministry of Economy	180.00	30.00	150.00				Tourism and business associations, Ministry of Environment and Waters, donors
18.	Create an Ecotourism Volunteer Program	Tourism associations, protected area administration, NEW Group, universities	210.00		20.00	50.00	80.00	60.00	Protected area and cultural site managers, their parent institutions, international volunteer programs, donors
Total for Product Development and Quality Assurance			3190.00						



No	Action	Leading Agency/ Partner	Required Funds in 1000 BGN						Potential Sources of Financing	
			TOTAL	2004	2005	2006	2007	2008		
Marketing and Promotion										
19.	Assist Regional Ecotourism Product Development	Branch, product, regional and local tourism associations; private companies; sustainable development associations	250.00	50.00	200.00					Donors, private business in Bulgaria and in the region
20.	Develop "Ecotourism - Naturally Bulgaria" Niche Marketing Strategy	National Tourism Agency; tourism associations; private businesses; VISIT; all state agencies, which organize presentations of the country abroad	1250.00	100.00	250.00	300.00	300.00	300.00		GoB, private sector, NGOs, donors
21.	Establish Bulgaria Transnational Tour Operator Sustainability Initiative	NEW Group; REC; BATA; BAAT	1200.00	100.00	200.00	300.00	300.00	300.00		Donors, private business
22.	Assist Domestic Ecotourism Products and Services Market Development	NEW Group, tourism associations, tour operators and tourism agencies, tourism information centers	500.00		250.00	250.00				Private investment, donors
23.	Promote Ecotourism Market Diversification	Tourism associations, protected area administrations, private business, tourism information centers	470.00	20.00	80.00	120.00	150.00	100.00		Private investment, mobilizing local resources
Total for Marketing and Promotion			3670.00							

No	Action	Leading Agency/ Partner	Required Funds in 1000 BGN						Potential Sources of Financing
			TOTAL	2004	2005	2006	2007	2008	
Human Resource Development and Training									
24.	Develop SME Ecotourism Development Training Program	NEW Group, National Tourism Training Council, universities and colleges, tourism associations, private businesses, Ministry of Economy, Ministry of Education and Science, National Business Development Network Association	800.00	200.00	600.00				Donors, EU-Sixth Framework Training Program
25.	Create an Ecotourism Destination Management Training Certificate	National Tourism Training Agency/ George Washington University, and other Bulgarian and foreign universities and colleges; Ministry of Education and Science; Ministry of Economy; tourism associations; Foundation for Local Government Reform	600.00		100.00	200.00	300.00		Donor, tuition and fees, SAPARD, EU
26.	Adapt SuperHost Customer Service Program to Bulgaria	Ministry of Education and Science, Ministry of Economy, tourism associations, National Business Development Network Association	800.00	50.00	150.00	200.00	200.00	200.00	Donors-CIDA and American Express, other donors and private sector agencies
27.	Create an Ecotourism Guide Certificate	National Sports Academy, Bulgarian Tourism Union, Ministry of Youth and Sports, Ministry of Economy, Ministry of Education and Science, BAAT, NEW Group, National Tourism Training Council, professional training centers	250.00			50.00	100.00	100.00	Donors, interested tourism associations, private business



No	Action	Leading Agency/ Partner	Required Funds in 1000 BGN					Potential Sources of Financing	
			TOTAL	2004	2005	2006	2007		2008
28.	Develop a Tourism Interpretation Design and Implementation Training Program	Protected area administrations, private business (tourism companies and professional training centers), tourism associations, educational institutions, NNPS, Ministry of Culture, Ministry of Education and Science, Ministry of Economy	470.00		70.00	100.00	150.00	150.00	Donors, PAF
29.	Establish University-Level Ecotourism and Sustainability Initiative	National Tourism Training Council, Ministry of Education and Science, Ministry of Economy	900.00	100.00	200.00	200.00	200.00	200.00	WTO-TEDQUAL seminars, CIDA, key international universities, Leonardus Program
Total for Human Resource Development and Training			3820.00						
Institutional Development									
30.	Build National Ecotourism Working (NEW) Group Capacity	National Tourism Council, NEW Group	230.00	30.00	50.00	50.00	50.00	50.00	GoB, donors, interested associations
31.	Create an Ecotourism Advisory Services Network	Tourism associations, NEW Group	50.00	50.00					SAPARD-TA; other donors

No	Action	Leading Agency/ Partner	Required Funds in 1000 BGN					Potential Sources of Financing	
			TOTAL	2004	2005	2006	2007		2008
32.	Strengthen and Replicate Ecotourism Development Program in Protected Areas, Other Attractive Natural Areas, and Municipalities	Protected areas administration, tourism associations, Ministry of Labor and Social Policy, Ministry of Regional Development and Public Works, Foundation for Local Government Reform, and PLEDGE program	2000.00	200.00	500.00	500.00	500.00	300.00	PHARE, World Bank/GEF, UNDP/GEF
33.	Incorporate Ecotourism Strategies in Regional and Municipal Development Plans	National Association of Municipalities in the Republic of Bulgaria, Foundation for Local Government Reform, Ministry of Regional Development and Public Works, tourism associations, and National Sustainable Development Association's "Good Alternatives"	180.00		30.00	50.00	50.00	50.00	Local governments, FLGR, GoB
34.	Establish a Federation of Regional Tourism Associations (RTAs)	RTAs	30.00	30.00					Donors
35.	Enhance Regional and Local Tourism Associations	NEW Group, RTAs	350.00	50.00	100.00	100.00	100.00		Donors
36.	Define Limits of Acceptable Change (LAC) for Cultural and Natural Sites	Ministry of Environment and Waters, Ministry of Culture	300.00	50.00	100.00	100.00	50.00		GoB, PAF, National Enterprise Fund
		Total for Institutional Development	3140.00						
		TOTAL	24595.00						





No	Action	Duration				
		2004	2005	2006	2007	2008
Information Management						
1.	Create an Ecotourism “Best Practices” Internet Portal	■	■	■	■	■
2.	Develop a Digital Library of Ecotourism Media Resources		■			
3.	Include Ecotourism Data Collection in Tourism Data Collection	■	■	■		
4.	Design an Ecotourism Information Management System	■	■	■		
5.	Populate the Ecotourism Information Management System	■	■	■		
6.	Create and Implement a National Signs Standard	■	■	■		
Ecotourism Enterprise Development						
7.	Develop and Operate Ecotourism Business Growth Centers	■	■	■	■	■
8.	Provide Ecotourism Business Advisory Services		■	■	■	■
9.	Create Ecotourism Financial Incentive Mechanisms	■	■	■	■	■
10.	Assist Small Ecotourism Enterprise (Accommodation) Development	■	■	■	■	■
11.	Develop and Support Capital Markets and Mechanisms for Ecotourism	■	■	■		

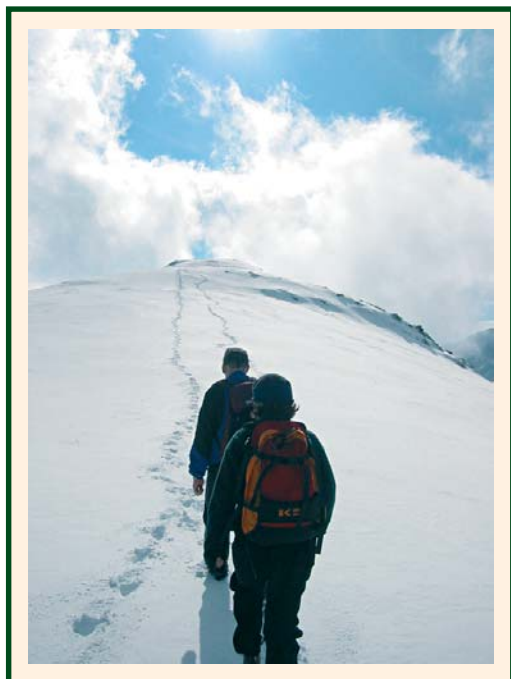
No	Action	Duration				
		2004	2005	2006	2007	2008 г.
<i>Product Development and Quality Assurance</i>						
12.	Create "Ecotourism - Naturally Bulgaria" Awards					
13.	Develop a Tourism Information Network (TIN)					
14.	Promote Community Events and Traditional Celebrations					
15.	Pilot an Ecolodge Network					
16.	Plan and Develop a Protected Area Eco-Chalet System					
17.	Support Ecotourism Products and Services Quality Assurance Certification					
18.	Create an Ecotourism Volunteer Program					
<i>Marketing and Promotion</i>						
19.	Assist Regional Ecotourism Product Development					
20.	Develop "Ecotourism - Naturally Bulgaria" Niche Marketing Strategy					
21.	Establish Bulgaria Transnational Tour Operator Sustainability Initiative					
22.	Assist Domestic Ecotourism Products and Services Market Development					
23.	Promote Ecotourism Market Diversification					



No	Action	Duration				
		2004	2005	2006	2007	2008
Human Resource Development and Training						
24.	Develop SME Ecotourism Development Training Program					
25.	Create a Ecotourism Destination Management Training Certificate					
26.	Adapt SuperHost Customer Service Program to Bulgaria					
27.	Create a Ecotourism Guide Certificate					
28.	Develop a Tourism Interpretation Design and Implementation Training Program					
29.	Establish a University-Level Ecotourism and Sustainability Initiative					
Institutional Development						
30.	Build National Ecotourism Working (NEW) Group Capacity					
31.	Create an Ecotourism Advisory Services Network					
32.	Strengthen and Replicate Ecotourism Development Program in Protected Areas, Other Attractive Natural Areas, and Municipalities					
33.	Incorporate Ecotourism Strategies in Regional and Municipal Development Plans					
34.	Establish a Federation of Regional Tourism Associations (RTAs)					
35.	Enhance Regional and Local Tourism Associations					
36.	Define Limits of Acceptable Change (LAC) for Cultural and Natural Sites					

Implementation of the National Ecotourism Action Plan (NETAP)

7.



The NETAP is a five-year plan. The sections, which follow, outline institutional arrangements, performance indicators and implementation guidelines.

*Central Balkan
Snowshoeing
Tour 2004*

Institutionalizing Ecotourism

7.1.

Implementation of the NETAP will be institutionalized in the National Ecotourism Working (NEW) Group within the National Tourism Council. The NEW Group is a logical outcome of the Protocol for Cooperation in the field of Ecotourism signed between the Ministry of Environment and Waters, the Ministry of Economy, and the Ministry of Agriculture and Forests on October 4, 2002. It is in accordance with Article 5, Item 2 of the Regulation on the Structure and Activity of the National Tourism Council, and is designed as a national-level ecotourism coordination

Jared Hardner

mechanism. The NEW Group will be formed as a unit of the National Tourism Council.

The NETAP will be implemented within an organizational framework capitalizing on the existence of national and regional tourism bodies. Each of the actions specified within this action plan will be implemented by a lead agency operating in collaboration with supporting agencies or organizations. The NETAP relies, for the most part, on using existing agencies.

NEW Group membership will be selected from key ministries identified in NETS and NETAP. It will also include national (eco) tourism business associations, national and regional tourism associations, select NGOs, and national associations working in the fields of the local government reform and the local self-governance.

The NEW Group will develop and implement a NETAP monitoring system.

Performance Indicators

7.2.

Monitoring is essential to measure the success and impact of the NETAP. The NETAP monitoring system will focus on the following indicators to measure impact and success of ecotourism at the local and regional levels:

- Contribution to the protection of natural areas and cultural resources;
- Reduction of negative biodiversity impacts;
- The ability to which the Action Plan has enhanced the sustainability of destinations in terms of environmental, economic and social measures;
- Influence on government policies which support sustainable forms of tourism;
- Contribution to expanding business enterprises and revenue generation;



- Evidence of tangible benefits provided to local people;
- Evidence of community involvement in tourism planning and decision making;
- The type and degree of social and cultural impacts;
- The ability of local residents to access to tourist resources and facilities as desired;
- Increased technical knowledge and skill levels of SME operators and employees;
- Expanded awareness of tourism and its role in community development among local government, communities, regional administrations, and protected area and cultural sites staff;
- Visitor satisfaction and indicators of positive interactions with local people; and
- The type and amounts of visitor contributions to ecotourism destinations, e.g., funds, volunteer services, goods, and other forms of assistance.

7.3. NETAP Implementation Guidelines

NETAP implementation will require institutionalization at national, regional and local levels. Ecotourism development will necessitate cooperation between these institutions. In addition, mechanisms will be needed to develop strategic partnerships between the national government, local authorities, and the private sector represented by businesses and NGOs. The following tenets have been identified in the course of developing this Action Plan, and are offered here as guidelines to facilitate its execution:

- 1. Roles of local authorities:** Their involvement and leadership are key factors to the development and promotion of the ecotourism segment of tourism development. To facilitate the development of this role, a partnership between the Ministry of Regional Development and Public Works and the national associations that maintain contacts with the local authorities would be beneficial. An ecotourism partnership between the Ministry, the National Association of Bulgarian Municipalities, and the Foundation for Local Government Reform, would help to integrate ecotourism into the local and regional development plans and strategies.
- 2. Regional ecotourism destinations:** For ecotourism to evolve successfully in Bulgaria, local brands, trip circuits and tour packages must be developed and keep evolving. The 12 regional ecotourism destinations defined within NETAP afford ecotourism developers the opportunity to craft destination management programs at manageable levels. Each region possesses unique combinations of natural and cultural heritage, land use traditions, cuisine, and crafts. Regional ecotourism destinations are designed to offer a realistic scale for local participation and feedback. Since ecotourism projects are already being developed within these destinations, they serve as a natural departure to continue action plan implementation that is realistic and affordable for planners and implementing partners.
- 3. Financial Mechanisms and Development Assistance:** NETAP's success will, in part, depend on the availability of funds. Existing funding mechanisms that include the EU-supported grants under the pre-accession funds and programs of SAPARD, PHARE and ISPA must be tailored more closely with the Action Plan. In addition to annual government and municipal budgets, there are other funding sources that could be tapped, including the National Environment Protection Activities Management Enterprise (the successor of the National Environment Protection Fund), and the new Protected Areas Fund and the National Trust Eco-Fund.



Additional funding opportunities are limited, and will require specific appeals for donor assistance. Efforts to construct cooperative funding strategies with the private sector remain largely unexplored and will require active investigation and networking. Equity investments and financial facilities are essential for the development of ecotourism-related businesses in areas surrounding protected areas. Strategic planning, financial analysis, and business plan development are also needed to create a project pipeline necessary to create entrepreneurial-driven, sustainable ecotourism. These tools must be accompanied by increased access to rural financing—both from government and the private banking sector. Despite the best intentions, funds that remain centralized and administered by central authorities and private financing are not sufficient to develop private business in most rural areas. New models for rural, ecotourism financing are required to meet the challenges of this segment within the sustainable tourism sector. This includes “cultivating” and maintaining direct contacts with potential project investors, including micro-credit facilities, foundations, multilateral financial institutions (e.g., International Finance Corporation, bilateral aid agencies) and commercial banks. Ecotourism financing is sufficiently important that it warrants special attention within the NEW Group.

- 4. International cooperation and partnerships:** Bulgaria remains largely isolated from international efforts in ecotourism. This NETAP requires these partnerships and networks to be mobilized and engaged without delay. This effort includes UN agencies (WTO, UNCTAD, ILO, UNDP, UNEP, UNESCO), key sustainable tourism universities, ecotourism NGOs, trade associations (ETC, WTTC, IHRA) and other sources.
- 5. National and transnational linkages and market access:** Government assistance is needed for ecotourism to become a real tool for rural economic growth and development. Intergovernmental agreements can be used to market products in Europe and internationally. Helping to develop market access and competitiveness for small tourism operators and tourism-dependent enterprises, such as food supply networks can augment tourism “products,” leading to higher income and employment in the tourism sector for lower income segments of rural populations.
- 6. National Forums on Ecotourism - Toward a Sustainable Tourism Strategy to Enhance Bulgaria’s Competitiveness:** Annual ecotourism/sustainable tourism forums are important tools for information sharing. They become annual focal points for lessons learned, the formal exchange of results and materials, as well as venues for public information and marketing. These forums should be maintained and organized until they no longer serve their clientele. Every effort should be made to maintain these forums by self-financing and sponsorship.
- 7. Development of a National Sustainable Tourism Strategy and Action Plan:** NETS and NETAP have demonstrated the efficacy of decentralized, participatory planning process and the engagement of a wide spectrum of tourism stakeholders. While this process could still be improved, it has set a precedent for a key segment of the sustainable tourism development agenda that should be captured in a national strategy and action plan. A national sustainable tourism strategy and action plan is fundamental to a successful, competitive Bulgaria in today’s demanding tourism markets.
- 8. Capitalize on existing business development facilities and services (national and international) prior to establishment of new ones:** Ongoing technical assistance is needed to assist competitive ecotourism “cluster” development through targeted assistance to: (a) business development and incubation (from



concept to financing); (b) the use of existing business development tools, including those available on Internet and by other electronic means; and (c) development of viable business projects that can be submitted to prequalified investors.

- 9. National ecotourism monitoring contributes to NETAP flexibility:** The University of Sophia has begun developing an ecotourism indicator monitoring system with the collection of baseline data and recommended monitoring procedures tailored to rural communities. Although the development of a monitoring system might be the least exciting element to tourism development, it is extremely important to the efficacy of this Action Plan. Follow-up data collection and analysis activities should be conducted periodically to assess the impact (both positive and negative) of tourism on the natural, social and economic environments within destinations, and by their accumulated impacts at the national level.

Periodic reviews of the Action Plan are extremely important to its success. These reviews should be conducted annually to reflect the dynamics of international markets, as well as changing national situations.

- 10. Celebrating and publicizing success:** Periodic reviews result in new lessons and the identification of problems, but also allow the marking of success. Periodic monitoring and evaluation of ecotourism development must be accompanied by the celebration of successes. Bulgaria is a pioneer in its efforts to alter its image on the international tourism markets, and a leader in south-eastern Europe for nature conservation in the wild. These benchmarks should be widely publicized and shared in regional and international circles.





APPENDICES

Photo credits on the previous page

Kukeri Festival in Pernik

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List of Background Materials Produced During the NETSAP Development Process

- A Guidebook for Monitoring Ecotourism Impacts on Protected Areas and Surrounding Communities. Guidebook and Data Collection Tools, December 2002, Maria Vodenska, ARD-BCEG Project Consultant
- Concept for Community-Based Ecotourism Around Protected Areas in Bulgaria, June 2001, Professor Donald E. Hawkins, International Ecotourism Specialist, Kamelia Georgieva, ARD-BCEG Project Eco-Enterprise Specialist
- Destination Management Business Concept for the Central Balkan Ecotourism Association – Kalofer, December 2002, Nikolay Ivanov, ARD-BCEG Project Consultant
- Destination Management Business Concept for the Ecotourism Association Rila, December 2002, Nikolay Ivanov, ARD-BCEG Project Consultant
- Report on Institutional Development of the Ecotourism Initiative Groups in the Pilot Regions of the BCEG Project, February 2003, Nelly Georgieva, ARD-BCEG Project Consultant
- Development of Competitive Ecotourism Products for Rila and Central Balkan Pilot Sites – Manual for Entrepreneurs and Small Business Operators, June 2001, Donald Hawkins and Kristin Lamoureux, Department of Tourism and Hospitality Management, School of Business and Public Management, The George Washington University, Washington, DC
- Bulgarian Ecotourism Development Outlook. Survey of the Domestic Market, December 2002, Plamen Vulchev, ARD-BCEG Project Consultant
- Ecotourism & Gateway Communities. Rila and Central Balkan National Parks, June 2001, GWU Technical Team, Washington, DC
- Ecotourism Impact / Success Indicators. Baseline Data 2002. Kalofer Pilot Region of Central Balkan National Park, June 2003, Dr. Nikolina Popova, ARD-BCEG Project consultant
- Ecotourism Impact / Success Indicators. Baseline Data 2002. Samokov Pilot Region of Rila National Park, July 2003, Dr. Nikolina Popova, ARD-BCEG Project consultant
- National Eco-tourism Meeting, Sofia, 11-12 February, 2003, REPORT, February 2003, Kamelia Georgieva, ARD-BCEG Project
- The First National Forum Ecotourism, Mountains and Protected Areas: Partners in Prosperity, October 2-5, Sofia Bulgaria, Report, October 2002, Kamelia Georgieva, ARD-BCEG Project
- Ecotourism and Bulgaria – an Overview, June 2003
- Situation Analysis – Ecotourism and Bulgaria, June 2003
- Nongovernmental Organizations and Institutions Involved in Ecotourism
- Tourism Information and Education Centers in Bulgaria
- Branch and Product Associations in Bulgaria
- Regional Tourism Associations in Bulgaria
- National and Regional Municipal Associations
- The Links of Ecotourism with Mass Tourism Market
- Ecotourism Digital Library Resources and Websites
- Proposed Bulgaria Ecotourism Destination Management Program



Action Plans for the 12 ecotourism destinations in Bulgaria

1. *Southwestern Bulgaria*
2. *Western Rhodopes*
3. *Eastern Rhodopes*
4. *Strandja, Eastern Trakia and the Southern Black Sea Coast*
5. *Eastern Balkan (Stara Planina)*
6. *Central Balkan National Park South*
7. *Vitosha – Northern Rila*
8. *Western Border*
9. *Western Balkan (Stara Planina)*
10. *Central Balkan National Park – North*
11. *Northern Black Sea Coast and Dobrudja*
12. *Danube River Wetlands*



Bulgarian Institutions Participating in the NETSAP Development Process

1. AGENCY FOR SMALL AND MEDIUM-SIZED ENTERPRISES
2. ALBENA LTD.
3. ASSOCIATION OF BULGARIAN BLACK SEA MUNICIPALITIES - VARNA
4. BAAT – BULGARIAN ASSOCIATION FOR ALTERNATIVE TOURISM
5. BALKAN ASSIST ASSOCIATION
6. BALKANTOURIST LTD.
7. BALKANTRAVEL LTD.
8. BATA – BULGARIAN ASSOCIATION OF THE TOURIST AGENCIES
9. BOTANY INSTITUTE BAS
10. BOURGAS REGIONAL TOURISM ASSOCIATION
11. BULGARIAN ASSOCIATION FOR RURAL AND ECOLOGICAL TOURISM
12. BULGARIAN HOTELS AND RESTAURANTS ASSOCIATION
13. BULGARIAN NATIONAL COMMITTEE OF ICOMOS
14. BULGARIAN SOCIETY FOR PROTECTION OF BIRDS
15. BULGARIAN TOURISM CHAMBER
16. BULGARIAN TOURIST UNION
17. BULGARIAN-AMERICAN CREDIT BANK
18. CENTRAL BALKAN – KALOFER ECOTOURISM ASSOCIATION
19. CENTRAL BALKAN NATIONAL PARK DIRECTORATE
20. COMMUNITY CENTER OBEDINENIE, KARDJALI
21. DOBRICH REGIONAL ADMINISTRATION
22. ECONOMY POLICY INSTITUTE
23. FLAG / DELAWARE UNIVERSITY
24. FOUNDATION FOR LOCAL GOVERNMENTAL REFORM
25. GEOGRAPHY INSTITUTE - BAS
26. GEOHIDE LTD.
27. INVESTORS ASSOCIATION
28. JOBS PROGRAM OF UNDP
29. KIUSTENDIL REGIONAL ADMINISTRATION
30. KORMORAN LTD.
31. LE BALKAN FOUNDATION - BULGARIA
32. LOCAL GOVERNMENT INITIATIVE PROGRAM OF USAID
33. MINISTRY OF AGRICULTURE AND FORESTS
34. MINISTRY OF CULTURE
35. MINISTRY OF ECONOMY
36. MINISTRY OF ENVIRONMENT AND WATER
37. MINISTRY OF FINANCE
38. MINISTRY OF REGIONAL DEVELOPMENT AND PUBLIC WORKS
39. MOUNTAIN RESQUE SERVICE
40. MUNICIPALITIES REGIONAL ASSOCIATION MARITSA - HASKOVO



41. NATIONAL ASSOCIATION OF MUNICIPALITIES IN THE REPUBLIC OF BULGARIA
42. NATIONAL ASSOCIATION OF SMALL AND MEDIUM BUSINESS
43. NATIONAL CRAFTS CHAMBER
44. PANDION - D LTD.
45. PARK AND LANDSCAPE SPECIALISTS IN BULGARIA UNION
46. PEOPLE AND MOUNTAIN ASSOCIATION
47. PERNIK REGIONAL ADMINISTRATION
48. PERSINA NATURE PARK DIRECTORATE
49. PIRIN NATIONAL PARK DIRECTORATE
50. PIRIN TOURIST FORUM
51. PROGIS LTD.
52. REGIONAL ASSOCIATION FOR TOURISM DEVELOPMENT
"NORTH WESTERN BALKAN"
53. REGIONAL ASSOCIATION OF MUNICIPALITIES - TRAKIA
54. RHODOPE MUNICIPALITIES ASSOCIATION – SMOLYAN
55. RHODOPE PROJECT OF GEF/UNDP
56. RILA ECOTOURISM ASSOCIATION
57. RILA MONASTERY NATURE PARK DIRECTORATE
58. RILA NATIONAL PARK DIRECTORATE
59. ROUSSE LOM NATURE PARK DIRECTORATE
60. RTA RHODOPE
61. SHUMENSKO PLATO NATURE PARK DIRECTORATE
62. SINITE KAMANI NATURE PARK DIRECTORATE
63. SMOLYAN REGIONAL ADMINISTRATION
64. SOFIA UNIVERSITY ST. KLIMENT OHRIDSKI
65. SREBARNA NATURE RESERVE
66. STARA PLANINA REGIONAL TOURIST ASSOCIATION
67. STRANDJA NATURE PARK DIRECTORATE
68. TOURISM COUNCIL - SOFIA
69. UNIVERSITY FOR NATIONAL AND WORLD ECONOMY
70. VARNA FREE UNIVERSITY CHERNORIZETS HRABAR
71. VARNA TOURISM CHAMBER
72. VEGENA LTD.
73. VITOSHA NATURE PARK DIRECTORATE
74. VRACHANSKI BALKAN NATURE PARK DIRECTORATE
75. WESTERN STARA PLANINA PROJECT, REGIONAL ENVIRONMENTAL
CENTER FOR CENTRAL & EASTERN EUROPE
76. WETLANDS RESTORATION AND POLLUTION REDUCTION PROJECT
(GEFTF 050706 BUL MOEW / WORLD BANK)
77. ZLATNI PIASATSI NATURE PARK DIRECTORATE

