Executive Summary
In a historic moment, Ukraine takes on the role of the Chair of the UNWTO Commission for Europe. In their communication, they outline the recovery of the global tourism industry, which has reached 84% of pre-pandemic levels by July 2023, and the adverse effects of Russia's ongoing war of aggression against Ukraine, impacting travel costs and patterns.

The Chair commends the recently launched "Tourism Opens Minds" campaign and emphasizes sustainability, education, competitiveness, investments, crisis resilience, cultural exchange, and governance as the key pillars of the future development of the tourism sector.

The Chair calls for support for the Agenda for Europe, a blueprint for the Organization's tailored support for a continued recovery within the region.

Communication of the Chair

Esteemed Secretary-General,
Distinguished Vice-Chairs,
Dear colleagues,

It is both the privilege and historic moment for me to address you all representing Ukraine as the Chair of the Commission for Europe of the UNWTO. My Country has gained this role for the first time since joining the Organization. Therefore, I would want to express my profound gratitude to all member nations for giving us this duty.

As we assemble for the 69th meeting of the Commission for Europe here, in this magnificent city of Samarkand, we are reminded of the unique intensity of culture, customs, and natural beauty this region has to offer. Please allow me also to personally thank Minister Aziz Abdukhakimov for the excellent organization and such a warm welcome to all delegations in Uzbekistan. This meeting provides us with a unique opportunity to unite our efforts in constructive dialogue and shape the future of tourism. I would also like to mention that Samarkand is one of the most beautiful World's Cultural Tourism destinations. I truly fell in love with this city.

It is worth mentioning that international tourism continues to recover from the worst crisis in its history, which was brought along with the pandemic. This is the latest data from UNWTO. The recent edition of the
World Tourism Barometer reports the increasing number of international tourists, which reached 84% of the pre-pandemic level in July. Actually, during the first half of 2023, 700 million tourists embarked on international journeys, marking a 43% increase compared to the same months in 2022.

July 2023 emerged as the most active month, with a recorded 145 million international travellers, approximately 20% of the total for the first seven months. International tourism will most probably recover up to 95% of pre-pandemic levels by the end of the current year. In the first seven months of 2023, all global regions had a strong recovery in tourism, supported by demand from a number of significant source markets.

The Middle East reported the best results from January to July 2023, with arrivals surpassing the pre-pandemic levels by 20%. This region remains the only one globally to have exceeded the levels of 2019. According to available data, Africa has restored 92% of pre-crisis visitors during these seven months, while the Americas have reached 87%. In the Asia-Pacific region, recovery accelerated to 61% of pre-pandemic arrivals after the opening of many destinations and source markets in late 2022 and early this year.

Europe has achieved 91% of pre-pandemic levels due to significant intra-regional demand and travel from the United States.

These figures give us all encouragement that the tourism sector will quickly recover.

Despite these promising prospects, we must, however, recognize that the ongoing conflict in the heart of Europe has a significant impact on the tourism industry. Specifically, persistent inflation and rising oil prices are leading to increased transportation and accommodation costs, affecting tourists’ spending patterns. Travelers are increasingly seeking value for money, opting for destinations closer to home and shorter trips. Recently, during the celebrations dedicated to World Tourism Day in Riyadh, UNWTO Secretary-General H.E. Zurab Pololikashvili presented “Tourism Opens Minds,” a landmark initiative aimed at showcasing the powerful role that tourism plays in connecting cultures and promoting peace and understanding.

I am particularly impressed by the fact that Tourism Opens Minds is designed to ensure economic development for less-visited destinations. Something similar is happening in Ukraine, I will get back to that later.

It is worth mentioning that this initiative aims to make less-known places more accessible to all tourists and ensure a warm welcome from host communities. Its primary goal is to promote lesser-known destinations and actively work on attracting tourists there. It also involves collaboration with governments and the private sector to encourage tourists themselves to be more open in choosing their travel destinations. It is more relevant than ever both for Global and European tourism.

Before I switch to the agenda, I'd like to use this moment and express my deep gratitude to Secretary-General of the UNWTO, Mr. Zurab Pololikashvili, Thank You for Your continuous support of Ukraine during an unfair and unprovoked full-scale invasion by Russia. We are excited to work closely with You, Sir, to advance the
cause of peaceful and sustainable tourism in the Europe and the whole world. Your commitment to peace, prosperity and justice in the global tourism community is quite remarkable.

My gratitude also extends to the Regional Director for Europe, Prof. Alessandra Priante, and all UNWTO Regional Department for Europe, for their constant valuable assistance to the Members and guidance for Ukraine during the transition into the Chairmanship of the Commission for Europe. Your knowledge and effective support are always helpful. Ukraine sends you a strong commitment of readiness for productive cooperation in coming years.

Furthermore, I would like to express Ukraine's heartfelt appreciation to Greece in this period of Chairmanship transition. It is necessary to acknowledge the outstanding work, dedication, and commitment. Learning your experience and achievements is the great navigation throughout the challenges and opportunities that lie ahead for Ukraine.

Esteemed representatives,

At this moment I'd like to outline some of the key directions of European and international tourism industry evolution. I'd also like to draw your attention to a vital initiative that holds the potential to shape the future of tourism in Europe and beyond.

As I mentioned before, the global tourism industry has challenged a significant transformation in recent years. We are facing a swiftly changing world with no exception for tourism sector.

Sustainability and Inclusiveness: beyond being a mere catchphrase, sustainability is now a pressing necessity. Modern travellers are increasingly drawn to destinations that prioritize environmental conservation, responsible resource management, and the well-being of local communities. In my capacity as the Chair of this commission, I pledge unwavering commitment to forging close partnerships with all member countries to champion sustainable tourism practices across Europe. Simultaneously, we must endeavour to make tourism a realm accessible to all, transcending age, ability, or background. In essence, the pillars of sustainable and inclusive tourism encompass peace and security, climate resilience, and other measures to mitigate the impacts of environmental and human-induced hazards on tourism. This endeavour also encompasses fostering resilience, ensuring accessibility for all, and empowering women and youth.

Education and Training: The future of our tourism industry hinges on workforce development, enhancing service quality, nurturing green and digital skills, and facilitating reskilling and upskilling initiatives to attract and retain talent.

Competitiveness: The vitality of our industry is intrinsically linked to product and destination development, coupled with certification and labelling programs that fortify our standing in the global marketplace.
Investments and Innovation: The digital revolution has irrevocably reshaped travellers’ journey and their interactions with destinations. Embracing technology and harnessing the potential of data will be instrumental in propelling the growth of our tourism sector. We must simultaneously confront the challenges presented by the digital divide, ensuring that every nation can partake in the benefits of these advancements. Here, we underscore the significance of digitalization, infrastructure enhancement, and the cultivation of entrepreneurial opportunities.

Tourism Policy and Governance: Effective management of human resources, advocacy for autonomy in decision-making processes, addressing issues surrounding short-term rentals, and advancing standardization are the cornerstones of a resilient and responsive tourism ecosystem.

Crisis Resilience: Recent global events have underscored the paramount importance of crisis management and resilience within the tourism sphere. It is imperative that we develop robust strategies to navigate crises such as pandemics, natural disasters, and geopolitical challenges such as wars, thereby ensuring the safety and security of all travellers.

Cultural Exchange: Tourism wields a profound capacity to nurture cultural exchange and foster mutual understanding among nations. We must steadfastly promote initiatives that celebrate our diverse cultures, heritage, and traditions, actively encouraging dialogue and collaboration.

Most of these key vectors, mentioned previously by former Chair Greece, are yet included in the Agenda for Europe – a document which I believe is familiar to every representative.

I wish to express our appreciation for the Working Group’s dedicated work, which was essential in creating the Agenda for Europe. Our shared commitment to sustainable tourism, innovation, crisis resilience, climate action, workforce development, and inclusivity is reflected in this agenda, which we suggest the UNWTO incorporate in its Programme of Work for 2024–2025. It is a roadmap for the future development of the European Region, and its acceptance and execution can help the tourist sector in the European Region and globally recover and expand.

I call upon the support of all the nations in our region for this important project. Make the Agenda for Europe a reality by joining forces, embracing innovation, and cooperating. Together, we can ensure that tourism remains a positive force that unites people, promotes economic development, and protects the natural and cultural wonders of our continent.

The Executive Council Members will hold conversations in the coming days about the adoption and integration of the Agenda for Europe into the UNWTO Programme of Work 2024–2025. We firmly state that the collaborative efforts of the European nations and the Regional Department for Europe on this front will influence the direction of tourism in Europe and further the UNWTO’s overarching purpose.
Prior to the full-scale Russian invasion, the tourism sector in Ukraine made about 3% of the Country\'s GDP. 2019 (the year before the pandemic) saw tax revenue from the tourism sector of €106,46 million. In 2020, it paid nearly €85,36 million, and in 2021, it paid €81,82 million. In the past year of 2022, representatives of Ukraine\'s tourism industry paid €39,8 million in taxes. In the first 6 months of 2023, representatives of the Ukrainian tourism industry paid €22,23 million in taxes.

Over the course of more than a year of war, 763 cultural heritage sites were damaged or destroyed in Ukraine. These sites also served as tourist locations that thousands of tourists visited every year.

The international organization UNESCO keeps statistics on damaged cultural objects in Ukraine. In early August, they released an updated list confirming the damage to 274 cultural objects since the beginning of the full-scale invasion.

Losses to the environment and ecology of Ukraine have reached €51,35 million according to various estimates, and this figure does not consider the damages caused by the explosion of the Kakhovska Hydroelectric Power Plant, as it is very difficult to assess their long-term impact while parts of the affected territories remain occupied.

A significant part of Ukraine\'s territory remains mined and contaminated with explosive objects, despite the 88,000 hectares that have already been cleared as of the beginning of 2023. We express our gratitude to all international partners who provide expertise and technical support in Ukraine. There is still much work to be done and the support of the world community in crucial. Currently, the main efforts of Ukrainian State Emergency Service are focused on demining the reclaimed territories of Kharkiv, Kherson, Donetsk, Sumy, Chernihiv, and Kyiv regions. The sooner we ensure these territories are secure, the sooner we move people back to their homes and invite international tourists to all corners of our beautiful country.

Nevertheless, tourism in Ukraine disappeared only in regions invaded by enemy troops and decreased in those where there remains high threat from mines and shelling. The geography and concentration of tourists have changed, but the need for tourism travel, leisure and recreation purposes never disappeared. The Ukrainian tourism industry continues to operate.

According to a survey commissioned by the SATD, over 45% of surveyed Ukrainians have travelled within the country for tourism purposes since the full-scale invasion. The attitude towards travel due to the full-scale war has not changed at all for 23% of Ukrainians. 21% mentioned that while traveling, they support the country\'s economy. The same percentage stated that they avoid any travel due to possible danger.

In general, 2023 can be considered as the year of domestic, local tourism for Ukraine. This year most Ukrainians in search of a reboot allowed themselves to restore their mental and physical health in the central and western regions of the country.
The tourist tax in Ukraine for the first six months of the current year increased by almost a quarter compared to the same period in 2021. This shows that domestic tourists remain active despite all the troubles caused by the war.

Local communities felt the demand, and I am pleased to observe the developing infrastructure in many underrated places. Regions seek for their uniqueness, work on branding, and engage in international projects. This is where SATD comes to the rescue – we help local communities rediscover their tourist magnets and plan their economy and infrastructure wisely. This is where we find parallels with the Secretary General’s “Tourism Opens Minds” initiative, which I mentioned earlier.

I would also like to mention Ukraine's Presidential initiative – “The Crimean Platform”. And I'll start with a small introduction about Crimea Peninsula and its bitter fate after 2014. This beautiful land, surrounded by 517 kilometres of pristine beaches, has been turned into a Russian military base. Thousands of hectares of unique preserved lands now serve as training grounds. The infrastructure stagnates, and nature is increasingly polluted.

At the third summit of the International Crimean Platform, which took place in Kyiv in August 2023, we discussed the development and restoration strategy for the peninsula, including tourism sector in collaboration with international partners.

Undoubtedly, it is emotionally challenging for all of us to dream of the peninsula returning to us as we once knew it. It will be different. But we will make proper efforts as we clearly see opportunities for revitalization and development to restore infrastructure and, most important, attract future investors. After its liberation, Crimea must transform into a popular tourist destination, with a focus on creating a peaceful recreation, entertainment, cultural and historical infrastructure integrated into the unique ecosystem of the Black Sea.

All free nations of the free world are welcome to join our efforts in revitalizing Ukraine’s tourism industry and Crimea in particular.

And this is where I am resuming.

Tourism is always associated with peace and prosperity. We believe that the tourism industry should become one of the key directions of the post-war recovery of Ukraine's economy. An industry that can quickly launch the development of regions and fill local budgets. To ensure this, it is necessary to unite the government, community, business, and international partners around the industry.

SATD prepares Ukraine's industry to ensure proper and profitable operation of it after Victory Day when the tourist flows will pour into Ukraine. In my opinion, the basis for the development of post-war tourism in Ukraine are proper functioning of the statistical systems with reliable sources of these statistics, effective management which includes reworked legislation, creation of DMOs in every region, ensuring the safety of travellers, and their financial security as well and international cooperation which we hope to achieve through
such international organizations as the UNWTO and through mutually beneficial bilateral cooperation with foreign countries. What is clear is that we are open to cooperation, and we will welcome your proposals to begin or to continue our cooperation in the field of tourism development. I also want to thank every country in the European region that responded to our requests regarding the exchange of experience. Information that you provided to the SATD during the last year formed the basis of new regulatory and legal acts that bring us ever closer to achieving our strategic goals, such as joining the EU.

We really hope that international commitment and unity for Ukraine will grow even more.

And we kindly invite you all to visit Ukraine after our Victory. We will do everything to show you our gratitude and respect.

Thank you!
Conclusions and recommendations CEU/CR/2 (LXIX)¹

The Commission for Europe,

Having heard the Communication of the Chair delivered by Ms. Mariana Oleskiv, Chair of the State Agency for Tourism Development of Ukraine,

1. Shows appreciation to the Chair of the Commission for Europe for her welcome remarks and communication of the chair;
2. Commends the Government of Ukraine for their leadership and commitment to the work of the Organization and in particular the Commission for Europe;
3. Acknowledges the outstanding work carried out by Greece, former Chair of this commission, and their contribution to the seamless transition of the chairmanship to Ukraine;
4. Appreciates Ukraine’s leadership in the preparation of the draft document “Agenda for Europe: Tourism leading the change”;
5. Notes with regret the effects that the full-scale Russian invasion of Ukraine has on tourism and the cultural heritage sites across the country and its wider region;
6. Maintains a firm stance in support of Ukraine and its people as they confront Russia’s ongoing war of aggression.

¹ This is a draft of the conclusions and recommendations for the corresponding agenda item. For the final text adopted by the Commission, please refer to the Conclusions and recommendations document issued at the end of the session.