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EU-Colombia Cooperation on Regional
Policy Capacity Building for Urban Cross-Border
Cooperation Actors

FINAL REPORT by TARGET EURO srl

December 2015



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Acronyms

ACODRES	: <i>Asociación Colombiana de la Industria Gastronómica</i>
AMC (MAC)	: Metropolitan Area of Cúcuta
ANATO	: <i>Asociación Colombiana de Agencias de Viaje y Turismo</i>
COTELCO	: <i>Asociación Hotelera y Turística de Colombia</i>
DANE	: <i>Departamento Administrativo Nacional de Estadística</i>
GDP	: Gross Domestic Product
LATAM	: Latin America
PFP	: <i>Plan Frontera por la Prosperidad</i>
PIDM	: Plan Integral de Desarrollo Metropolitano
TAs	: Travel Agencies
TM	: Technical Masterplan
ToR	: Terms of Reference
TSD	: Technical Support Document
TT.OO	: Tour Operators
UNWTO	: United Nations World Tourism Organization
WTTC	: World Tourism and Travel Council



Abstract

The present document is the Final Report for the project **EU-COLOMBIA COOPERATION ON REGIONAL POLICY: CAPACITY BUILDING FOR URBAN CROSS-BORDER COOPERATION ACTORS - Detailed Action Plan to Support Sustainable Tourism in the Metropolitan Area of Cúcuta**. The objective of this project and therefore this report is the definition of a tourism development strategy for the Metropolitan Area of Cúcuta with the purpose to: i) to build sustainable tourism projects, taking into account the historical, landscape and social characteristics of the region; ii) to build an institutional support model to facilitate initiatives and micro-projects and to guide decision making, monitoring and evaluation of tourism projects; iii) to support activities leading to a comprehensive environmental management system. Target Euro has activated a participatory approach with all local stakeholders and has organised its activity into 2 phases:

1. *Analysis of the situation*: Tourism demand, Tourism supply, Existing tourism products, Existing tourism infrastructure, Organisation of the tourism industry in the project area, Main Constraints and SWOT matrix.
2. *Tourism Development Strategy and Action Plan*: Definition of the objectives and tourism development strategies, Definition of the Action Plan.

Summary

Target Euro has been retained by the European Commission for Regional Development to provide consulting services for the project EU-COLOMBIA COOPERATION ON REGIONAL POLICY: CAPACITY BUILDING FOR URBAN CROSS-BORDER COOPERATION ACTORS in Cúcuta.

The general objectives of this project are:

- Supporting the key public and private stakeholders in the Metropolitan Area of Cúcuta to identify the main challenges and solutions to support the development and promotion of tourism in the territory. Particular emphasis will be made to their status as a border area.

The specific objectives of this project are:

- Encourage the management of sustainable tourism development models, identifying specific projects that take into account the historical, geographical and social characteristics of the region.
- Promoting sustainable development based on the participation of all stakeholders, public and private actors and civil society.
- Support activities for the development of integrated environmental management systems, including tourist circuits in the project area.

An overview: Tourism in Colombia and in the Department of the Norte de Santander

COLOMBIA

- Colombian tourism has grown by 14% in 2014, recording around 4.2 million international tourism arrivals, growing faster than global tourism, which increased by 4.7% in 2014 and the Latin American tourism which increased by 5.7%. (UNWTO)



- The direct contribution of tourism to the national GDP was equivalent to 1,9% and is expected to rise to 3.1% in 2015. (WTTC). The tourism sector generated almost 1,3 million jobs in 2014, 6,1% of total employment, and 8.0% of total exports in 2014. (WTTC)
- The USA is the most important market of origin with around 15%, followed by Venezuela (11%) and Argentina. Europe represents only 13% of total demand and Spain (4%), Germany (2%), France (1.5%), UK (1.1%), Italy (1%) and the Netherlands (1%) being the most important markets.

NORTE de SANTANDER

- Data from the Camara de Comercio de Cúcuta highlights tourism in the Department of Norte de Santander as a high growth sector, passing from 166,000 million pesos in 2000 to about 651,000 million in 2013. Hotels and restaurants represented 5.7 % of the total GDP for the area in 2013.
- Norte de Santander attracts only 2.2 % of arrivals of foreign tourists in Colombia, most of these tourists are Venezuelan.
- Norte de Santander is sixth in terms of international tourism arrivals in the Country, with around 44.000 tourists in 2014, it is the Department that recorded the second highest growth rate compared to 2013 (more than 37% than the previous year), demonstrating that tourism is becoming an important sector for the local economy.

Tourism in Metropolitan Area of Cucuta

a) Tourism Demand

- 53,000 foreign tourists crossed the border passing from Venezuela into the Metropolitan Area of Cúcuta. In 2010, 59,193 foreign tourists crossed the border into Colombia at Cúcuta and 60,294 in 2011. This decrease is mainly related to the economic crisis in Venezuela. If a tourist enters the Country via Cúcuta, but it does mean that they will stay in the city; most travel on to other Departments in Colombia.
- Arrivals in the Metropolitan Area have seen a 37% increase since 2008. Domestic tourism has seen the highest increase, almost 40%, mainly accounted for by tourists in transit (max 1-2 nights) who then travel on to Venezuela or the Margarita Islands. Only 16% of total tourists Cúcuta in 2014 were foreign visitors with an average stay of only 1.3 nights.

b) The Tourism offer

Target Euro collected the information through personal interviews with local stakeholders, field visits, analysis of official data provided by local stakeholders (Chamber of Commerce of Cúcuta, local government, etc.) and a questionnaire analysis carried out with local tour operators. This information has been used to create a detailed analysis of all the sectors that constitute to the tourism offer.

- Tourism services: The Metropolitan Area of Cúcuta represents more than 87 % of the hotels Norte de Santander, for an estimated 2,500 rooms. The quality offered is varied; however, there are a number of hotels, especially members of COTELCO, which are up to international standards. Hotel occupancy rates are low with an average of 40% over the past 5 years but has some of the most competitive prices in Colombia, almost 40% less than the national average.



- [Restaurants, coffee shops and street food sellers](#): The Metropolitan Area of Cúcuta represents a major gastronomic centre in the Department and has almost 2.800 restaurants and bars. Acodres (Colombian Association of the Food Industry) is developing local cuisine in terms of quality of services and preservation of local gastronomy.
- [Travel agencies and tour operators](#): This sector is in crisis with a reduction of almost 26% since 2012. According to the interviews carried out by Target Euro, most operators/travel agents are for outgoing travel, there are only 10 incoming Tour operators/travel agents.
- [Transport](#): Quality of the transport services ranges from high international standards to very low quality. 93 companies are registered as tourist transport companies
- [Cultural assets](#): The Area has different cultural attractions, including museums, historic buildings and archaeological spots. The most important of them are the Templo Histórico de Cúcuta and the House of General Santander. Local tourism stakeholders do not yet properly exploit these key tourism attractions.
- [Natural assets](#): There are no major natural tourist attractions in the Metropolitan Area of Cúcuta. However, in the Department of Norte de Santander, there are some important natural attractions, such as the unique natural area of Los Estoraques, that could be easily integrated into the future tourism product portfolio.
- [Tourist Routes](#): The Corporación Mixta de Promoción de Norte de Santander, in collaboration with the Chamber of Commerce of Cúcuta and the Government of Norte de Santander, have designed several cultural and natural routes. All these routes have been mapped and designed, however they still have not been organised according to the dynamics of a tourist destination.
- [Accessibility](#): Accessibility is limited: the closest city is Bucaramanga almost 5 hours by car. All other important destinations are more than 11:00 hours by car. This is a major limitation for the project area, considering that it is a barrier for the organisation of multi-destination tours. Flights are limited; the Camilo Daza Airport has one direct flight abroad (Panama) and six domestic flights. The Juan Vicente Gomez Airport in Venezuela only has domestic flights due to the international flight embargo.
- [Information](#):
 - The budget for promoting the destination on the national and international tourism markets is very limited and very often tourism is not considered as a priority for the local policy makers, there is not a well-developed destination brand strategy.
 - There is the need to improve the existing information, develop new information, inform and train key stakeholders.
 - During the interviews carried out by Target Euro none of the key players who were interviewed remembered that 2021 is the year of the “200th anniversary of the signing of the Constitution of the Great Colombia”. From the tourism point of view, it could be a very important event to re-launch tourism industry in the destination.
 - Some institutional stakeholders have implemented websites and social networks pages purpose to share information. However, at the present the exchange of information between stakeholders is very limited
- [Tourism product](#): Different tourism studies promoted by local stakeholders (Chamber of Commerce of Cúcuta, Municipality of Cúcuta, etc.) have identified historical tourism, health tourism and MICE tourism as the most important tourism products for investment for developing the tourism industry in the Metropolitan Area of Cúcuta.



- Legislation and Tourism Organisation: Key institutions that develop programs and projects to strengthen the tourism sector of Cúcuta and Norte de Santander should be considered in the tourism development strategy are the following:
 - Public Entities: Ministry of Culture and Tourism of Cúcuta, Ministry of Economic Development Department, SENA, Colombia Migration, ProColombia, Tourist Police
 - Private entities: Cúcuta Chamber of Commerce, Corporation North Joint Promotion
 - Association and Unions such as, COTELCO, ACODRES and ANATO.
 - Airlines: Avianca, LAN and SATENA.

c) Main Constraints

Interviews with key actors in the AMC and the results of surveys with tour operators in the Metropolitan Area of Cúcuta show that the main issues affecting tourism development are: i) Organisation of the tourism system; ii) Weakness of tourism supply and demand; iii) Limited development of tourism facilities; iv) Planning and Development; v) Security.

d) Tourism Development Policy and Strategy for the Metropolitan Area of Cúcuta

Based on the individual meetings and workshops carried out by Target Euro with local tourism stakeholders, the Tourism Development Strategy of the Metropolitan Area of Cúcuta will be based on three pillars that should drive local stakeholders during the implementation of the strategy. These three pillars are: i) **Diversification** of the tourism product; ii) **Quality and Competitiveness** of the tourism services; iii) long term **Sustainability**.

The objectives of the Tourism Development Strategy of the MAC are to:

1. Diversify the present tourism supply, developing new tourism products and strengthening existing ones.
2. Transform the Metropolitan Area of Cúcuta from a “transit” destination to one of the most important cultural destinations of the Country (the place where the Gran Colombia was born).
3. Create a favorable business environment and to stimulate tourism investments, especially referring to private sector and local communities.
4. Increase the quality of the tourism services and facilities, adapting them for a medium – high level tourism demand.
5. Strengthen the present competitiveness of the tourism enterprises.
6. Develop a new image of the Metropolitan Area of Cúcuta.
7. Stimulate knowledge of the destination on a national and, more importantly, international level.
8. Improve collaboration between private and public tourism stakeholders and improve / stimulate the communication between the different stakeholders involved in the tourism development.



e) Action Plan

Based on discussions with local stakeholders, the activities of the Action Plan for the implementation of the tourism development strategy of the Metropolitan Area of Cúcuta are organised in four groups as following: i) Institutional Strengthening; ii) Infrastructure Development; iii) Tourism Product Development; iv) Promotion and Marketing. Target Euro presented and discussed all activities of the Action Plan with all local stakeholders in order to obtain their approval.

In addition, Target Euro has identified a pilot project consisting in the organisation of one-year event for the commemoration of the 200-year anniversary of the signature of the Constitution of Gran Colombia. This project is very expensive, however, it is considered a strategic action to definitively launch the tourism supply of the Metropolitan Area of Cúcuta on a national and international level. All stakeholders understood this strategic role of the organisation of the 200-year anniversary for the tourism development of the destination, however, it is important to specify that the implementation of the Action Plan does not depend by the 200-year anniversary and it can be implemented individually.

f) Management model

The implementation of the program will be under the responsibility of the Ministry of the External Relations, with the program called “*Plan Frontera por la Prosperidad*” and will involve all local stakeholders. The full participation of all local stakeholders will be particularly important for the implementation of the Action Plan and the management model for the MAC includes the organisation of working groups with the purpose to involve and empower all local stakeholders in the implementation of the tourism development strategy.

g) Estimated budget

Finally, total estimated budget for the implementation of the Action Plan is around **12.8 billion Colombian pesos** for 5 years program. This amount does not include the organisation of the Bicentenary event.



Table of Contents

Acronyms	2
Abstract	3
Summary	3
1. Introduction	9
1.1 Objectives of the technical assistance	9
1.2 The project area: Metropolitan Area of Cúcuta.....	10
2. An overview: Tourism in Colombia and in the Department of the <i>Norte de Santander</i>	12
3. Tourism Demand	15
4. The Tourism offer	18
4.1 Tourism services.....	19
4.2 Tourism assets	23
4.3 Tourism infrastructure	25
4.4 Information	28
4.5 Tourism products	29
4.6 Legislation and Tourism Organisation	31
5. Main Constraints	32
6. SWOT Analysis	35
7. Tourism Development Policy and Strategy for the Metropolitan Area of Cúcuta	37
7.1 Tourism development objectives.....	37
7.2 Pillars of the Tourism Development Strategy	38
7.2.1 Diversification	38
7.2.2 Quality and Coopetition	39
7.2.3 Sustainability	40
8. Action Plan	42
9. Program management	46
10. Estimated budget	47



1. Introduction

Target Euro has been retained by the European Commission for Regional Development to provide consulting services for the project EU-COLOMBIA COOPERATION ON REGIONAL POLICY: CAPACITY BUILDING FOR URBAN CROSS-BORDER COOPERATION ACTORS in Cúcuta.

As suggested in the ToR, the technical assistance provided by Target Euro Srl has been organised in two phases (Analysis of the Situation and development of a Tourism Development Strategy and Action Plan). After the successful completion of both phases, this report represents the final version of the Tourism Development and Action Plan of the Metropolitan Area of Cúcuta.

Target Euro has implemented a participatory working method throughout this consultancy. All relevant tourism stakeholders in the Metropolitan Area of Cúcuta, or at least as many as possible, have been involved in the development of the strategies. This working method started with our first meeting and it has continued for the entire duration of the technical assistance. The activities of the action plan have been presented, discussed and approved by all local stakeholders.

1.1 Objectives of the technical assistance

The general objectives of this project are:

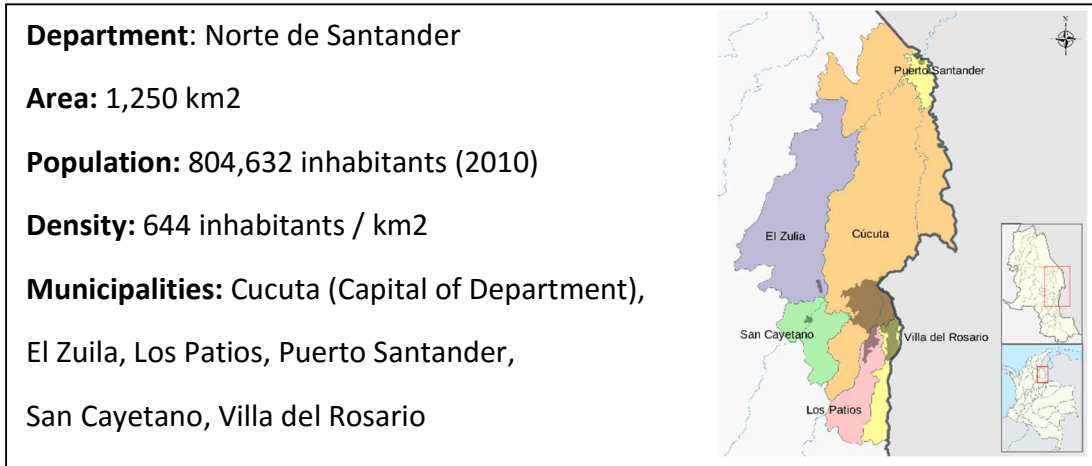
- Supporting the key public and private stakeholders in the Metropolitan Area of Cúcuta to identify the main challenges and solutions to support the development and promotion of tourism in the territory. Particular emphasis will be placed on their status as a border area.

The specific objectives of this project are:

- Encourage the management of sustainable tourism development models, identifying specific projects that take into account the historical, geographical and social characteristics of the region.
- Promoting sustainable development based on the participation of all stakeholders, public and private actors and civil society.
- Support activities for the development of integrated environmental management systems, including tourist circuits in the project area.

1.2 The project area: Metropolitan Area of Cúcuta

Fig#01: Metropolitan Area of Cúcuta



The Metropolitan Area of Cúcuta (AMC) was established in 1991 (Ordinance No.40 of January 3, 1991) and became fully operational in January 1992. The AMC represents less than 10 % of the land area of *Norte de Santander*; however it accounts for about 70 % of the total population.

As shown in the graphic above, the Metropolitan Area of Cúcuta is formed by the main city of Cúcuta and by Villa del Rosario, Los Patios, San Cayetano, El Zulia and Puerto Santander. According to the 2005/2020 Census, the Metropolitan Area has a combined population of more than 830,000 people. It is the largest Metropolitan Area in eastern Colombia and sixth largest in Colombia.¹

Tab#01 Population of main cities in Norte de Santander 2002 / 2008

Municipalities	2005		2008		Var. (2005-2012)	
	Pop.	%	Pop.	%	Pop.	%
Cúcuta	587.676	77.5%	606.150	77.1 %	18.474	66,7%
El Zulia	20.309	2.6 %	21.012	2.6 %	703	2,5%
Los Patios	67.281	8.8 %	69.967	8.9 %	2.686	9,7%
Puerto Santander	8.720	1.1 %	9.155	1.6 %	435	1,6%
San Cayetano	4.493	0.6 %	4.742	0.6 %	249	0,8%
Villa Del Rosario	69.833	9.2 %	74.980	9.5 %	5.147	18,6%
Total	758.312	100,0%	786.009	100,0%	27.697	100,0%

The projection for 2008, compiled by DANE, compared with data from 2005 shows that in percentage terms the city of Cúcuta has decreased (from 77.5 % to 77.1 %), yet in terms of overall growth it shows a population increase of 67%. It emphasises that the AMC is the only sub-department with an increase of the rural population to urban areas.

¹ <http://microdata.worldbank.org/index.php/catalog/490>



It shares the border crossing point with San Antonio del Tachira in Venezuela. Its location on the border means it has strong links with the Venezuelan city of San Cristóbal, which is 60km away; most tourists pass through Cúcuta because of its border crossing. The town's economy is largely based on industry and the city is well known for bilateral trade and manufacturing.²

According to data from the Development Plan 2012-2015 *Norte de Santander*, economic activity in the AMC is 90% industrial, commercial and service activities, being the centre for cross border crossings and transactions with Venezuela. Within the last 20 years, the economy of the Metropolitan Area of Cúcuta, and especially the tourism sector, has depended a lot on the flow of Venezuelan visitors. However, due to the present economic crisis in Venezuela, this tourism segment has consistently reduced affecting the economic development of the AMC.

The Metropolitan Area of Cúcuta is the most active "Free zone" in Colombia and one of the most active border areas in all of Latin America, due to the close trading links between Colombia and Venezuela. Due to a specific legislation, investors can develop their own "free zone", which covers all or only part of the area where the investors have decided to build. The Health sector is the main sector benefiting from this legislation and many health clinics have been opened over the last few years. Consequently, health tourism is growing rapidly in the Metropolitan Area of Cúcuta.

Based on the documentation analysed by Target Euro, to date, the AMC³ Land Management Plans have not been sufficiently developed and do not have an unambiguous and shared vision. They are the sum of programs and projects that do not contribute to the construction of the Metropolitan region. As noted by the TSD it is necessary to develop a model to guide the Metropolitan Planning, which offers options for different TMP, at least with regard to models of land use, particularly those close to the main roads.

With the exception of the *Malecón del Pamplonita* River which has newly restored, public spaces in Cúcuta do not reflect the importance of the city as a metropolitan centre. Many are also in precarious conditions and do not express design organisation in the city; most of these areas are located almost exclusively in the Eastern quadrant of the urban area.

The PIDM (*Plan Integral de Desarrollo Metropolitano*) has identified five strategic areas for the future development of the Metropolitan Area of Cúcuta:

1. Greater mobility for sustainable development as a central issue to address the sprawling Cúcuta area and spatial dislocation.
2. Environmental Sustainability in the Metropolitan Area, to contrast the environmental degradation due to inadequate environmental management, proposing strengthening

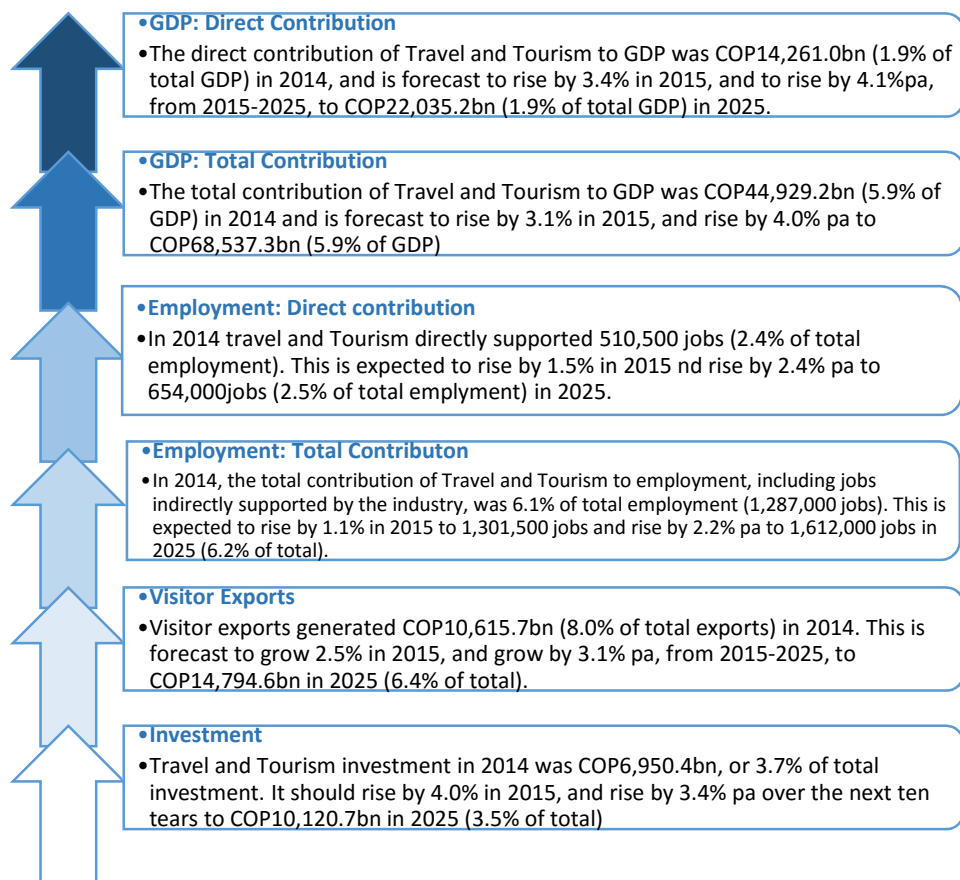
² <http://www.comunidadandina.org/documentos/docSG/Ayudamemoria14-4-05.htm>

³ See Annex 2 for more details on the urban dynamics of the Metropolitan Area of Cúcuta (AMC, in its Spanish acronym).

- interventions on several issues, including the landscape recovery of the Metropolitan Area.
3. Metropolitan social development and strengthening for sport and culture etc.
 4. Economic Development to the metropolitan competitiveness
 5. Metropolitan management for institutional strengthening.
2. An overview: Tourism in Colombia and in the Department of the Norte de Santander

Colombian tourism has grown by 14% in 2014, recording around 4.2 million international tourism arrivals. This means that tourism in Colombia is growing faster than global tourism, which according to the UNWTO increased by 4.7% in 2014. This increase is also higher than the total growth of Latin American tourism which was 5.7%. Based on WTTC 2014 data, direct contribution of tourism to the national GDP was equivalent to 1.9% and is expected to rise to 3.1% in 2015. In addition, the tourism sector generated almost 1.3 million jobs in 2014, equivalent to 6.1% of total employment, and it has contributed 8.0% of total exports in 2014.

Fig#02: WTTC Annual research facts on Colombia - 2015



Source: Elaboration by Target Euro WTTC (Travel and Tourism – Economic Impacts 2015 – Colombia)



At country level, tourism is a new important economy that is growing rapidly. The National Government has declared it a priority in its Country Development Policy and has already developed a legislation framework with the purpose of regulating the sector and stimulating national and international investments. Total investments in tourism in 2014 accounted for 3.7% of total investments and they should rise to 4.0% in 2015.

Considering the present flow of international tourism arrivals (almost 4.2 million as stated by the data provided by the Ministry of Trade, Industry and Tourism), around 60% of them arrived by air and Bogotá was the most important tourism destination with almost 25% of total arrivals to the Country.

Tab#02 - International tourist arrivals in Colombia - 2014

Llegadas de turistas a Colombia en 2014	
International tourist arrivals to Colombia - 2014	4.192.742
<i>International tourists not residents in CO (by air)</i>	<i>1.967.814</i>
<i>Colombians not residents in CO (by air)</i>	<i>597.522</i>
<i>Passengers from Cruises</i>	<i>314.20</i>
<i>Arrivals from national borders</i>	<i>1.313.199</i>

Source: Ministry of Trade, Industry and Tourism

The United States of America is the most important market of origin of the present tourism demand, with around 15%, followed by Venezuela (11%) and Argentina (6%). At regional level, South America represents 33.5% of total present tourism demand and Ecuador, Brazil and Chile are important markets in addition to Venezuela and Argentina. Europe represents only 13% of total demand and Spain (4%), Germany (2%), France (1.5%), UK (1.1%), Italy (1%) and the Netherlands (1%) are the most important European countries.

Nationally, tourists spend an average of almost 90 thousand pesos per day. With the highest values being tourism business (167mil pesos a day) and shopping (211mil pesos a day).

Tab#03: Average expenditure per day (per capita) by travel motivation (\$ Pesos)

Travel motivation	TOTAL	Hotel	Transport	Local transport	Food & Beverage	Other costs
Total average	87.888	9.032	19.686	5.587	19.858	33.726
Business	167.505	34.744	45.445	8.153	38.881	40.282
Pleasure	52.598	7.571	6.808	1.179	20.516	16.524
Visit family and friends	34.838	452	9.805	1.202	11.828	11.551
Education / training	51.608	6.667	13.749	4.247	17.162	9.783
Health tourism	65.772	4.602	21.274	5.444	10.580	23.872
Religion / pilgrims	47.448	5.114	10.265	417	12.964	18.688
Shopping	210.780	6.933	23.375	21.378	32.425	126.669
Others	72.556	6.171	26.763	2.676	14.506	22.440

Source: DANE - EGIT 2012-2013



Referring to tourism in the **Department of Norte de Santander**, based on the data provided by the *Camara de Comercio de Cúcuta* (CCC), it is among the sectors that recorded the highest growth, passing from 166,000 million pesos in 2000 to about 651,000 million in 2013. Hotels and restaurants represented 5.7 % of the total GDP for the area in 2013.

Tab#04 Aggregate value by economic activity, current Price 2000 – 2013

NORTE DE SANTANDER						
<i>Aggregate value by economic activity, current Price 2000 – 2013 (Billion pesos)</i>						
ECONOMIC ACTIVITIES	2000	2005	2010	2011	2012	2013p
MINING AND QUARRYING	94	197	386	439	548	333
MANUFACTURING INDUSTRY	342	423	666	728	792	810
ELECTRICITY, GAS AND WATER	137	244	387	383	434	481
CONSTRUCTION	106	179	743	776	690	1.182
COMMERCE , REPAIR , RESTAURANTS AND HOTELS	659	740	1.154	1.282	1.346	1.441
Commerce	458	446	621	702	689	702
Maintenance and repair of vehicles	35	42	64	69	82	88
Hotels, restaurants, bars and similar	166	252	469	511	575	651
TRANSPORT, STORAGE AND COMMUNICATIONS	250	547	826	858	859	928
FINANCING, INSUR., REAL ESTATE AND BUSINESS SERV.	613	854	1.415	1.525	1.633	1.744
SOCIAL WORK ACTIVITIES , COMM.TY AND PERSONAL	836	1.256	2.208	2.341	2.552	2.817
SUBTOTAL ADDED VALUE	3.482	5.186	8.876	9.495	9.918	10.829
Taxes	163	278	484	591	619	618
GDP of the Department (TOTAL)	3.645	5.464	9.360	10.086	10.537	11.447
GDP COLOMBIA	208.531	340.156	544.924	619.894	664.240	710.257

Source: Camara de Comercio de Cúcuta.

However, in terms of tourism arrivals, the **Department of Norte de Santander attracts only 2.2 % of arrivals of foreign tourists in Colombia**, and most of these tourists are Venezuelan.

Tab#05 - International tourist arrivals by destinations - 2014

Destination	Year		Var.(%) 2014/2013
	2013	2014	
BOGOTÁ D.C.	888.852	1.012.824	13,90%
BOLÍVAR	228.122	258.670	13,40%
ANTIOQUIA	192.553	221.463	15,00%
VALLE DEL CAUCA	129.859	143.347	10,40%
SAN ANDRÉS Y PROVIDENCIA	54.656	83.036	51,90%
ATLÁNTICO	53.932	54.468	1,00%
NORTE DE SANTANDER	31.735	43.555	37,20%
MAGDALENA	22.274	22.909	2,90%
SANTANDER	22.571	22.821	1,10%
RISARALDA	19.015	19.363	1,80%
OTROS	82.731	85.358	3,20%
TOTAL	1.726.300	1.967.814	14,00%

Source: Ministry of Trade, Industry and Tourism



The analysis shows that the Department of *Norte de Santander* is sixth in terms of international tourism arrivals in the Country, with around 44.000 tourists in 2014. In addition, it is the Department that recorded the second highest growth rate compared to 2013 (more than 37% than the previous year), demonstrating that tourism is becoming an important sector for the local economy. The main urban tourism destinations of the Department are Cúcuta and its Metropolitan Area, Ocoña and Pamplona.

3. Tourism Demand

Tourism statistics for Cúcuta and its Metropolitan Area are very limited. Based on the data provided by DANE, if we only consider the city of Cúcuta, the data shows that it is the seventh most visited city by foreign tourists in Colombia. This is an increase of nearly 70% compared to figures from 2009.

Tab#06: Foreign Tourists in Cúcuta 2008-2012 (DANE)

Ciudad	2009	2010	2011	2012	% Var. 2009 / 2012	% Part. 2009	% Part. 2010	% Part. 2011	% Part. 2012	Trend 2009 / 2012
Bogotá	692.826	754.960	861.725	903.657	30,4%	51,2%	51,2%	54,5%	53,4%	↑
Cartagena	155.264	169.100	177.861	206.066	32,7%	11,5%	11,5%	11,2%	12,2%	↑
Medellín	143.093	163.120	151.466	166.391	16,3%	10,6%	11,1%	9,6%	9,8%	↓
Cali	98.060	113.146	109.484	112.278	14,5%	7,2%	7,7%	6,9%	6,6%	↓
Barranquilla	50.872	52.647	53.697	51.917	2,1%	3,8%	3,6%	3,4%	3,1%	↓
San Andrés	47.550	48.633	46.277	51.590	8,5%	3,5%	3,3%	2,9%	3,0%	↓
Cúcuta	15.928	16.509	20.209	26.981	69,4%	1,2%	1,1%	1,3%	1,6%	↑
Santa Marta	17.078	18.128	20.437	22.429	31,3%	1,3%	1,2%	1,3%	1,3%	=
Bucaramanga	23.009	23.961	22.997	21.496	-6,6%	1,7%	1,6%	1,5%	1,3%	↓
Pereira	15.878	16.510	15.691	18.080	13,9%	1,2%	1,1%	1,0%	1,1%	=
Maicao	3.164	3.363	3.172	7.747	144,8%	0,2%	0,2%	0,2%	0,5%	↑
Pasto	13.753	2.550	3.848	7.478	-45,6%	1,0%	0,2%	0,2%	0,4%	↓
Armenia	5.936	6.676	7.568	7.378	24,3%	0,4%	0,5%	0,5%	0,4%	=
Ipiales	6.511	7.175	6.320	7.002	7,5%	0,5%	0,5%	0,4%	0,4%	↓
Manizales	5.004	5.651	6.233	6.152	22,9%	0,4%	0,4%	0,4%	0,4%	=
Valledupar	3.484	3.916	4.293	4.551	30,6%	0,3%	0,3%	0,3%	0,3%	=
Ibagué	2.919	3.606	3.756	3.812	30,6%	0,2%	0,2%	0,2%	0,2%	=
Popayán	1.471	1.802	1.997	3.207	118,0%	0,1%	0,1%	0,1%	0,2%	↑
Villavicencio	2.198	2.406	2.889	3.117	41,8%	0,2%	0,2%	0,2%	0,2%	=
Resto	49.762	61.025	62.190	61.493	23,6%	3,7%	4,1%	3,9%	3,6%	↓
Total	1.353.760	1.474.884	1.582.110	1.692.822	25,0%	100,0%	100,0%	100,0%	100,0%	

Source: DANE, 2013

In addition, available data on border crossings from 2012 show that 53,000 foreign tourists crossed the border passing from Venezuela into the Metropolitan Area of Cúcuta. This figure shows a decrease in use by foreign visitors, in 2010, 59,193 foreign tourists crossed the border into Colombia at Cúcuta and 60,294 in 2011. This decrease is mainly related to the economic crisis in Venezuela. In addition, these tourists enter the Country via Cúcuta, but it does not mean that they will stay in the city; most probably, they travel on to other Departments in Colombia. This is due to the fact that Venezuelan tourists that cross the border do not need to register if they stay in the Department of *Norte de Santander*. While registration at the border office is compulsory when tourists move to other Departments within the Country.

The data provided by COTELCO show that tourism arrivals in the Metropolitan Area of Cúcuta have grown sensitively during last 5 years. There has been a 37% increase since 2008. Domestic tourism is the market has seen the highest increase, almost 40% this is mainly accounted for by tourists in transit (max 1-2 nights) who then travel on to Venezuela or the Margarita Islands. This is something that has been mentioned by key actors (tour operators) during the missions of the Target Euro consultants in Cúcuta.

Tab#07: National and international Tourists in the Metropolitan Area of Cúcuta.

Year	GRAND TOTAL		
	National	Foreign	TOT
2010	108.458	22.776	131.234
2011	114.730	29.751	144.481
2012	146.233	30.672	176.905
2013	163.136	20.023	183.158
2014	151.502	28.463	179.965
<i>Δ2010 / 2014</i>	<i>39,7%</i>	<i>25,0%</i>	<i>37,1%</i>

Source: Elaboration of Target Euro with data provided by the Cámara de Comercio de Cúcuta

If we consider the proportion of national and international tourists in the Metropolitan Area of Cúcuta. Based on the data provided by the Cámara de Comercio de Cúcuta, only 16% of total tourists arriving to the Metropolitan Area of Cúcuta in 2014 were foreign visitors.

Tab#08: Proportion national / foreign tourists in the AMC

Year	GRAND TOTAL		
	National	Foreign	TOT
2008	76,0%	24,0%	100,0%
2009	67,4%	32,6%	100,0%
2010	82,6%	17,4%	100,0%
2011	79,4%	20,6%	100,0%
2012	82,7%	17,3%	100,0%
2013	89,1%	10,9%	100,0%
2014	84,2%	15,8%	100,0%
<i>Average 2008 - 2014</i>	<i>80,2%</i>	<i>19,8%</i>	<i>100,0%</i>

Source: Elaboration of Target Euro with data provided by the Cámara de Comercio de Cúcuta (COTELCO members only)

The domestic tourism demand in Cúcuta has registered a variable fluctuation over the years. In 2012 and 2013, the highest number of tourists visited in the last four months of the year. Whereas, in 2014 the peak season was during the first four months.

Fig#03: Distribution of national tourists



Source: Elaboration of Target Euro with data provided by Cámara de Comercio de Cúcuta

While international tourists essentially visit the area in November and December (32%) and August and September (around 20%).

Tab#09: Monthly distribution of international tourists and overnight-stays

Tourists	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total
Total Internationals	1.876	1.678	1.525	1.493	1.713	1.464	1.838	3.182	2.709	1.953	3.848	5.184	28.463
Venezuelans	1.038	1.351	1.097	1.166	1.044	1.082	1.337	2.517	2.016	752	1.549	831	15.780
%	55.3%	80.5%	71.9%	78.1%	60.9%	73.9%	72.7%	79.1%	74.4%	38.5%	40.3%	16.0%	55.4%
Overnight Stays (days)	1,2	1,3	1,2	1,6	1,3	1,2	1,4	2	1,2	1,1	1,1	1,1	1,3

Source: Elaboration of Target Euro with data provided by the Chamber of Commerce of Cúcuta. 2014

The analysis shows that 55.4% of foreign tourists who visited the Metropolitan Area of Cúcuta were Venezuelan. If we only consider these Venezuelan tourists, the data recorded a concentration of arrivals during the year from February to September.

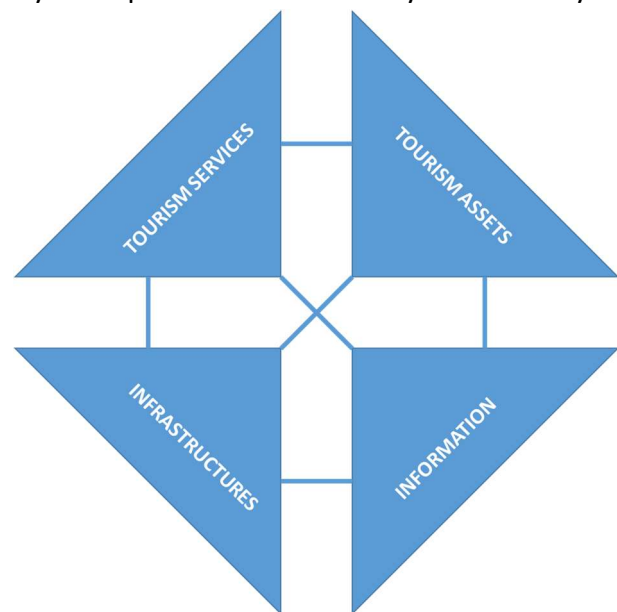
Finally, the average stay of international tourists was only 1.3 nights.

4. The Tourism offer

This chapter details the main characteristics of the present tourism industry in the Metropolitan Area of Cúcuta and how it is organised. In addition, it also contains an analysis of the most critical issues to be considered for the formulation of the tourism development strategy.

Target Euro has collected the information through personal interviews with local stakeholders, field visits, analysis of official data provided by local stakeholders (Chamber of Commerce of Cúcuta, local government, etc.) and a questionnaire analysis carried out with local tour operators⁴.

To fully understand the analysis, it is important to conceptualise the tourism industry and its characteristics because many different economic sectors play a part in the tourism supply system. The tourism product has a composite character, and is the result of an interactive process involving local assets and resources, local stakeholders and the local government. Often, tourism is viewed solely as a private sector activity when really a successful and sustainable tourism development requires close collaboration between central government and the private sector as well as different government departments. Local Governments need to work with the private sector to establish parameters for tourism (e.g. policy objectives), facilitate tourism development (e.g. via tourist boards, service provision) and support it (e.g. via land using planning). The success of a tourist destination depends on the ability of those involved in local level tourism development, to coordinate and organise the different stakeholders involved in the local tourism supply.



Fig#04: Main elements of tourism supply

Based on this consideration, Target Euro has organised the analysis of the tourism supply in the project area in the following four elements:

- Tourism services
- Tourism assets
- Infrastructures
- Information

⁴ See Annex 3 “Questionnaire for Tour Operators”.

The analysis is focused on the Metropolitan Area of Cúcuta. When data was not available at Metropolitan level, Target Euro has used data at Departmental level to describe the present situation.

4.1 Tourism services

Accommodations

The Metropolitan Area of Cúcuta represents more than 87 % of the hotels in Norte de Santander, for an estimated 2,500 rooms. The quality offered is varied; however, there are a number of hotels, especially members of COTELCO, which are up to international standards.

Tab#10: Hotels in the AMC

Hotels in the Metropolitan Area of Cúcuta			
Cúcuta	236	83,4%	87,3%
El Zulia	4	1,4%	
Los Patios	13	4,6%	
Puerto Santander	2	0,7%	
San Cayetano	0	0,0%	
Villa del Rosario	28	9,9%	
TOTAL AMC	283	100,0%	
Other areas	41		12,7%
TOTAL Norte de Santander	324		100,0%

Source: Elaboration of Target Euro with data provided by the Camara de Comercio de Cúcuta.

Data shows that only 12% of hotels in the Area are registered as ‘companies’ while the remaining 88.3% are registered in the name of an individual. This can be linked to the fact that almost all the hotels in the AMC (98.9%) are micro or small enterprises.

Tab#11: Legal standing of hotels

Legal standing									
	Cucuta	El Zulia	Los Patios	Puerto Santander	Villa del Rosario	TOTAL		Norte de Santander	
Individual person	207	4	11	2	26	250	88,3%	290	89,5%
Enterprise	29		2		2	33	11,7%	34	10,5%

Source: Elaboration of Target Euro with data provided by the Camara de Comercio de Cúcuta.



Tab#12: Business size of hotels

Business size									
	Cucuta	El Zulia	Los Patios	Puerto Santander	Villa del Rosario	TOTAL		Norte de Santander	
Micro	220	4	13	2	27	266	94,0%	306	94,4%
Small	13				1	14	4,9%	15	4,6%
Medium	2					2	0,7%	2	0,6%
Large	1					1	0,4%	1	0,3%

Source: Elaboration of Target Euro with data provided by the Camara de Comercio de Cúcuta.

The hotel sector in the AMC can be described as “dynamic”, as shown by various analysis’ carried out in recent years. Almost 38% of the companies, managing the hotels, have been established within the last four years. If we take into account the hotels that have opened since January 2014, data from the Cúcuta Chamber of Commerce shows the registration of 62 new businesses (22% of the total). On the negative side, 71 hotels have been cancelled from the register, most of which were in Cúcuta city.

Tab#13: Year of establishment of hotels

Year of foundation									
	Cucuta	El Zulia	Los Patios	Puerto Santander	Villa del Rosario	TOTAL		Norte de Santander	
< 1990	22				1	23	8,1%	23	6,9%
1991 - 2000	12		3		3	18	6,4%	30	9,1%
2001 - 2010	103	3	7	1	15	129	45,6%	145	43,8%
2011 >	92	1	3	1	9	106	37,5%	126	38,1%
nd	7					7	2,5%	7	2,1%

Source: Elaboration of Target Euro with data provided by the Camara de Comercio de Cúcuta.

The hotel occupancy rate is low with an average of 40% over the past 5 years. This value is relatively small and could have an effect on the quality offered, considering that the hotel owners have limited resources to reinvest in the development of their business. September to December 2014 were the months that registered the highest occupancy rate, according to interviews this was a period with a large number of corporate events (seminars, conferences, etc.).

Tab#14: Monthly Hotel Occupancy Rate (2008-2014)

Year	MONTH												Annual average	
	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec		
2008	44,84%	50,36%	47,63%											47,61%
2009	54,68%	54,03%	48,50%											52,40%
2010	33,87%	39,23%	40,69%	40,02%	38,12%	40,20%	41,63%	45,84%	42,58%	42,58%	47,12%	35,13%		40,58%
2011	31,93%	37,78%	42,57%	37,64%	39,10%	42,16%	40,72%	44,63%	48,73%	48,73%	47,00%	38,62%		41,63%
2012	35,74%	42,56%	41,99%	41,77%	45,92%	43,84%	44,13%	40,52%	44,76%	44,76%	68,05%	40,07%		44,51%
2013	31,65%	37,64%	35,23%	38,48%	39,51%	32,56%	34,96%	39,41%	36,06%	36,06%	36,46%	31,92%		35,83%
2014	31,06%	37,12%	34,47%	33,50%	37,39%	34,23%	38,63%	38,45%	44,16%	46,28%	45,65%	41,70%		38,55%
2008/2014	37,68%	42,67%	41,58%											
2010/2014	32,85%	38,86%	38,99%	38,28%	40,01%	38,60%	40,01%	41,77%	43,26%	43,68%	48,86%	37,49%		40,22%

Source: Elaboration of Target Euro with data provided by the Camara de Comercio de Cúcuta.

Considering the number of employees compared to the number of rooms available, the Department of *Norte de Santander* has a very low tourism employment rate (index: 0.54 in 2014). In fact, it ranks as one of the lowest positions in the Country, well below the national average (0.77). This index is important in the tourism industry because it is normally used to analyse the quality of the tourism services of a destination. In this particular case, it means that the project area needs to increase the number of employees and improve their skills and competences.

Finally, referring to the room prices, they are some of the most competitive in Colombia. Almost 40%, less than the national average, half the average price in Bogota and almost a third of the cost of a hotel room in Cartagena.

Tab#15: Room price in Colombia (2013-2014)

Capítulo	Diciembre 2013	Diciembre 2014	Variación Diciembre 2013/2014	Acumulado ene-dic. 2013	Acumulado ene-dic. 2014	Variación ene-dic. 2013/2014
Antioquia	\$159.248	\$169.203	↑ 6,3	\$152.708	\$164.978	↑ 8,0%
Atlántico	\$148.534	\$159.387	↑ 7,3	\$176.025	\$173.070	↓ -1,7%
Barrancabermeja	\$169.987	ND	ND	\$139.961	ND	ND
Bogotá	\$231.480	\$234.290	↑ 1,2	\$241.960	\$241.460	↓ -0,2%
Boyacá	\$227.997	\$222.308	↓ -2,5	\$189.057	\$198.759	↑ 5,1%
Caldas	\$105.880	\$118.520	↑ 11,9	\$105.227	\$122.887	↑ 16,8%
Cartagena	\$370.530	\$392.375	↑ 5,9	\$327.396	\$325.660	↓ -0,5%
Caquetá	\$123.577	\$117.888	↓ -4,6	\$115.411	\$100.748	↓ -12,7%
Cauca	\$83.847	\$105.349	↑ 25,6	\$59.335	\$85.797	↑ 44,6%
Cesar	\$147.535	\$149.818	↑ 1,5	\$152.140	\$155.707	↑ 2,3%
Cundinamarca	\$117.192	\$128.481	↑ 9,6	\$119.699	\$122.680	↑ 2,5%
Huila	\$184.782	ND	ND	\$124.071	ND	ND
Magdalena	\$276.843	\$269.863	↓ -2,5	\$186.490	\$232.781	↓ 24,8%
Meta	\$129.834	\$168.885	↑ 30,1	\$139.298	\$138.102	↓ -0,9%
Nariño	\$79.841	\$129.256	↑ 61,9	\$115.323	\$135.346	↑ 17,4%
Norte de Santander	\$132.230	\$127.480	↓ -3,6	\$120.822	\$123.099	↑ 1,9%
Quindío	\$303.622	\$227.192	↓ -25,2	\$203.306	\$192.743	↓ -5,2%
Risaralda	\$137.933	\$132.580	↓ -3,9	\$155.164	\$151.796	↓ -2,2%
San Andrés, Islas	\$230.172	\$218.958	↓ -4,9	\$210.100	\$196.871	↓ -6,3%
Santander	\$123.949	\$154.042	↑ 24,3	\$149.083	\$145.392	↓ -2,5%
Sucre	\$118.600	\$126.035	↑ 6,3	\$137.546	\$125.468	↓ -8,8%
Tolima	\$156.462	\$172.924	↑ 10,5	\$147.376	\$162.611	↑ 10,3%
Valle del Cauca	\$127.861	\$156.443	↑ 22,4	\$151.682	\$154.489	↑ 1,9%
Total Muestra	\$204.476	\$212.133	↑ 3,6	\$206.318	\$206.002	↓ -0,2%
TRM (USD) ³	105.7	90.4		110.4	102.9	
Total sin Bogotá	\$189.314	\$202.124	↑ 6,8	\$181.260	185.741	↑ 2,5

²Tarifa Promedio: tarifa que se cobra en promedio por habitación vendida

³Tasa de cambio promedio Diciembre 2014 \$ 2.344,23; Diciembre 2013 \$ 1.934,08; Acumulado a Diciembre 2014 \$2.001,11; acumulado a Diciembre 2013 \$ 1.868,90. Fuente Banco de la República 5 de Diciembre/2014.

Source: Elaboration of Target Euro with data provided by the Camara de Comercio de Cúcuta.

The low price of hotel rooms can also be considered as additional evidence of the current low competition ability of the destination. Based on interviews with some hotel managers, we can see that the destination is not attracting important tourism flows and tourism stakeholders therefore have to reduce their prices to attract tourists.

Restaurants, coffee shops and street food sellers

The Metropolitan Area of Cúcuta has almost 2.800 restaurants and bars of various types. The quality varies widely, but there are excellent restaurants with international standards. Additionally, ACODRES (Colombian Association of the Food Industry) is developing local cuisine in terms of quality of services and preservation of local gastronomy. This has greatly boosted the development of the food industry, almost doubled the number of micro food companies, and now represents a major gastronomic centre in the Department.

The analysis shows as this sector is very dynamic and almost 66% of them have been established within the last 5 years. At the same time, the “mortality rate” of this typology of business is very high too and more than 1,300 restaurants have been cancelled from the registry of the Chamber of Commerce of Cúcuta during 2014.

Tab#16: Restaurants in the AMC

Location	number
Cucuta	2.270
El Zulia	77
Los Patios	254
Puerto Santander	32
San Cayetano	32
Villa del Rosario	117
TOTAL AMC	2.782
Norte de Santander	3.044

Source: Elaboration of Target Euro with data provided by the CCC

Travel agencies and tour operators

The tourism brokerage sector in the project area indicates a crisis with a reduction of almost 26 % of companies in respect to 2012. According to the interviews carried out by Target Euro, most operators/travel agents are for outgoing travel, while the incoming tour operators/travel agents are less than 10 units. The main destination offered is Margarita Island (Venezuela). The current crisis with the Venezuelan government has slashed the tour operator business with great economic damage to the sector.

Tab#17: Number of tour operators / travel agencies by size 2012-2014

Year		Total	Large	Medium	Small	Micro	Yearly dif.	Dif.2012-2014
2012		90	0	1	8	81	-	-25,9%
2013		96	0	1	7	88	8,6%	
2014		65	0 0%	1 2%	4 6%	60 92%	-31,8%	

Source: Elaboration of Target Euro with data provided by the Camara de Comercio de Cúcuta.



Transport

There are a variety of public transport services including taxi, bus and other private transport. Of these, about 93 companies are registered as tourist transport companies. Compared to the analysis of previous years there has been a reduction of almost 14% in the number of transport businesses.

Tab#18: Number of transport companies by size 2012-2014

Year	Total	Large	Medium	Small	Micro	Yearly dif.	Dif.2012-2014
2012	86	0	1	8	77	-	9,1%
2013	108	0	1	9	98	27,3%	
2014	93	0 0%	1 1%	8 9%	84 90%	-14,3%	

Source: Elaboration of Target Euro with data provided by the Chamber of Commerce of Cúcuta.

Quality of the transport services ranges from high international standards to very low quality.

4.2 Tourism assets

Tourism assets represent the trip motivation for tourists. Depending on the typology of the tourism products, local stakeholders combine the tourism assets (primary and secondary assets) with the purpose of making the destination more appealing.

Based on the interviews with local stakeholders and the analysis of the available documentation, Tourism assets in the Metropolitan Area of Cúcuta are limited, however some of them could easily have international appeal capable of attracting important tourism flows.

The most important tourism attractions of the Metropolitan Area of Cúcuta are as follows:

Cultural assets

The Metropolitan Area of Cúcuta has different cultural attractions, including museums, historic buildings and archaeological sites. The most important of these are the *Templo Histórico de Cúcuta* and the Home of General Santander. Both assets have a very high potential in terms of ability to attract national and international tourists. They are the places where the Constitution of the Gran Colombia was signed (1821, the *Templo Histórico de Cúcuta* is located in the Greater Colombia Park.) and where General Francisco de Paula

Santander was born in Cúcuta on 2nd April 1792. The Home of General Santander has now been turned into a Museum in his honour.

Fig#5: Templo Histórico de Cúcuta



Fig#6: Home of General Santander



Despite their high tourism potential, local tourism stakeholders do not yet properly exploit these key tourism attractions. The 200-year anniversary of the signing of the Constitution of Gran Colombia definitely represents an excellent opportunity to relaunch these tourism attractions and the related tourism product.

Finally, other cultural attractions that can be integrated into the Cultural Tourism Itinerary of the Metropolitan Area are:

- Library Julio Perez Ferrera
- The House of Culture,
- The Clock Tower
- The Archaeological Zone Agualinda (Los Patios)
- The local gastronomy
- Villa Quinta Teresa
- Carmen de Tonchalá

Natural assets

There are no major natural tourist attractions in the Metropolitan Area of Cúcuta and, in general, as shown on the map, there are different lakeside bathing opportunities and Lagunas around the Metropolitan Area. Normally, the local population are those who take advantage of the present tourism attractions. However, in the Department of Norte de Santander, there are some important natural attractions, such as the unique natural

Fig#7: Map of natural assets in the AMC





area of *Los Estoraques*, that could be easily be integrated into the future tourism product portfolio of the Metropolitan Area of Cúcuta.

Tourist Routes

The Corporación Mixta de Promoción de Norte de Santander, in collaboration with the Chamber of Commerce of Cúcuta and the Government of Norte de Santander, have designed several cultural and natural routes linking Cúcuta with major attractions and tourist destinations within the Department of Norte de Santander. The main routes are:

1. Ruta del Río (Cúcuta, Santiago, Gramalote, Lourdes).
2. Las rutas de la historia los indígenas y las lagunas (Cúcuta, Pamplonita, Pamplona, Mutiscua, Silos, Chitagá, Cacota).
3. Los Parques Naturales y el Ecoturismo (Cúcuta, Sardinata, Abrego, La Playa, Ocaña, El Carmen, Convention).
4. La Ruta del Sol de Atañó y la Libertad (Cúcuta to Puerto Santander). This route includes the Metropolitan Area of Cúcuta.
5. La Ruta del durazno y el agua (Cúcuta, Pamplona, and Cacota Chitagá).

All these routes have been mapped and designed, however they still have not been organised according to the dynamics of a tourist destination.

4.3 Tourism infrastructure

The present paragraph is aimed at analysing the existing tourism infrastructure in the Metropolitan Area of Cúcuta, particularly its accessibility, since this is one of the most important factors for a destination in order to receive visitors, and telecommunication services, since they are actually very important for the tourism development of a destination.

Accessibility

Both accessibility by air and land is limited. If we consider the **accessibility by land**, the closest city is Bucaramanga. It is less than 200 km from Cúcuta; however, it takes almost 5 hours by car. All other important destinations in the Country are more than 11 hours by car.

This is an important limitation for the project area, considering that it is a barrier for the organisation of multi-destination tours. Tourists visiting other tourism destinations in the Country are not stimulated to spend an entire day to reach Cúcuta.

Tab#19: Trip duration by car and/or bus

From	To	Km	Duration
Cúcuta	Bogotá	555	11:00 horas
	Bucaramanga	193	4:45 horas
	Medellin	593	11:15 horas
	Cartagena	740	13:00 horas
	Cali	952	17:15 horas
	Barranquilla	678	12:25 horas
Caracas	861	11:28 horas	

Source: Elaboration of Target Euro with Google-map

Fig#7: Altimetry chart



The **accessibility by air** is also limited and does not help the tourism development of the destination. The Metropolitan Area of Cúcuta is near two international airports. The Camilo Daza International Airport in Colombia and the Juan Vicente Gomez International Airport in Venezuela. The latter is the airport used by all the TT.OO / TAs in the Metropolitan Area for tour packages bound for Isla Margarita in Venezuela.

Flights are limited; the Camilo Daza Airport has one direct flight abroad (Panama) and six domestic flights (Arauca, Barranquilla, Bogota, Bucaramanga, Medellin, Ocaña). The Juan Vicente Gomez Airport in Venezuela only has domestic flights due to the international flight embargo.

Fig#8: Position of Airports on map



Tab#20: Weekly frequency and direct flight connection with international destinations

Ciudad	Weekly frequency		Country with direct connectivity
Bogotá	648	73,8%	20
Medellín	90	10,3%	8
Cali	64	7,3%	6
Cartagena	32	3,6%	2
Barranquilla	21	2,4%	2
Pereira	7	0,8%	1
San Andrés	4	0,5%	1
Cúcuta	4	0,5%	1
Bucaramanga	4	0,5%	1
Armenia	2	0,2%	1
Rioacha	2	0,2%	1
Total general	878	100,0%	44

Source: Elaboration of Target Euro with data from the Ministry of Trade, Commerce and Tourism

The very limited number of passengers recorded at Cúcuta airport (Camilo Daza) also demonstrates this difficulty. Only 25.355 passengers in 2014.

Tab#21: Number of passengers by airport in Colombia (2013-2014)

City - Airport	Year		%		Var. (%)
	2013	2014	2013	2014	2014/2013
BOGOTÁ - ELDORADO	2.964.959	3.334.110	67,6%	67,8%	12,5%
RIONEGRO - JOSE M. CORDOBA	519.255	584.002	11,8%	11,9%	12,5%
CALI - ALFONSO BONILLA ARAGON	362.580	399.484	8,3%	8,1%	10,2%
CARTAGENA - RAFAEL NUÑEZ	197.324	222.088	4,5%	4,5%	12,5%
BARRANQUILLA-E. CORTISOZ	118.013	122.828	2,7%	2,5%	4,1%
PEREIRA - MATECAÑAS	79.415	86.220	1,8%	1,8%	8,6%
BUCARAMANGA - PALONEGRO	40.023	41.739	0,9%	0,8%	4,3%
SAN ANDRES-GUSTAVO ROJAS PINILLA	29.078	48.556	0,7%	1,0%	67,0%
ARMENIA - EL EDEN	27.220	25.640	0,6%	0,5%	-5,8%
CÚCUTA - CAMILO DAZA	17.837	25.355	0,4%	0,5%	42,1%
OTROS	30.432	26.863	0,7%	0,5%	-11,7%
TOTAL	4.386.136	4.916.885	100%	100%	12,1%

Source: Ministry of Trade, Industry and Tourism

Telecommunications

Cúcuta city and the Metropolitan Area have modern communications systems: landlines (more than 100,000), mobile networks, broadband, Wi-Fi, internet cafes and IP communications. The main companies in this sector are Telefónica Telecom, UNE, Claro, Tigo and Movistar.

Mobile phone services are available for all major providers in Colombia, with 100% network coverage. The networks, Claro, Tigo and Movistar have offered 4G internet connection since 2008.

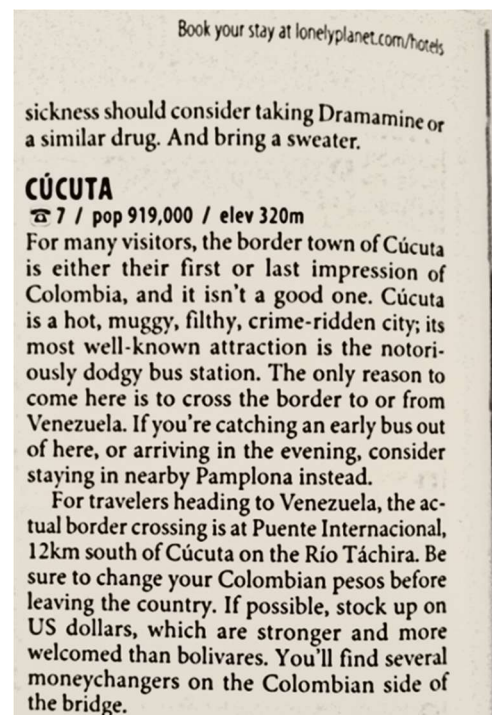
4.4 Information

The information system organised by local stakeholders has strategic importance for the development of a tourism destination. In particular, it has a dual aim: on one hand, it allows tourists to know about a tourism destination; while, on the other hand, it provides information to all local stakeholders, informing them on what is going on in the destination and helping them to make decisions.

Considering the two main aims of the information system and the different stakeholders involved in the tourism supply, the information can be classified as follows:

- **Promotion:** refers to the communications directed at tourists about attractions and services organised by local stakeholders within a tourism destination. Based on the interviews with local stakeholders, the budget for promoting the destination on the national and international tourism markets is very limited and very often tourism is not considered as a priority for the local policy makers. In addition, there is not a well-developed destination brand strategy. Very often stakeholders use different brands to promote the area on the market and so communication is not always well coordinated. Furthermore, with all due respect to the available promotional material, often the quality of the images and content used in the various national and international information or promotional material is of poor quality. The municipality of Cúcuta has planned to develop an integrated tourism communication strategy; however, it has still to be designed. Finally, the present image of Cúcuta and its Metropolitan Area at international level is still negative and considered a dangerous area, as reported by one of the most popular international tour-guides (Lonely Planet). See Fig#9
- **Interpretation of the tourism assets:** this kind of communication allows tourists to know about the characteristics of the tourism attractions. This kind of information is generally important in terms of promotion and development of the tourism products.

Fig#9 – Cúcuta, Lonely Planet 2011





Mainly tour operators and tour guides use them to inform tourists about the tourism assets of the tourism destination. Referring to the Metropolitan Area of Cúcuta, with the exception of the Santander Museum, a lot remains to be done in terms of interpretation of the natural and cultural assets in the destination. There is the need to improve the existing information, develop new information, inform and train key stakeholders. This is despite the efforts of both public and private institutions to improve the existing interpretation of tourism in the Metropolitan Area.

This form of interpretation is critical for the development and organisation of the tourism industry. Both the culture and traditions of a population and their resources can only be transmitted if it is properly interpreted by tourists and if these resources pertain to all key stakeholders, in other words that they 'make them their own'. For example, during the interviews carried out by Target Euro none of the key players who were interviewed remembered that 2021 is the year of the "200th anniversary of the signing of the Constitution of the Great Colombia". From a tourism point of view, it could be a very important event to re-launch tourism industry in the destination, however, no one remembered this date and no one is working to organise special events for this historically important anniversary.

- ***Institutional information:*** this kind of information is referred to the communication between public and private stakeholders that work in the same tourism destination. Referring to Cúcuta and its Metropolitan Area, some institutional stakeholders implemented websites and social networks pages with the purpose of sharing information. However, at present the exchange of information between stakeholders is very limited.

4.5 Tourism products

Many definitions of 'tourism product' exist, however, for the purpose of the present analysis we consider "a tourism product as a combination of tourism assets and services, which generates tourism flow to the destination".

Based on this assumption, there are different tourism products that are actually organised and provided to tourists visiting Cúcuta and its Metropolitan Area. They are as follows:

1. ***Historical tourism:*** is the product with the greatest potential yet currently generates low tourist flows, mainly for local tourists. However, the next bicentennial year (2021) could represent an excellent opportunity for positioning the destination in the international arena.
2. ***MICE tourism:*** Meeting, Incentive, Congress and Event tourism is the most dynamic tourism product for the development of the Metropolitan Area of Cúcuta. Several hotels in the area have been developed especially for this market and have meeting rooms with a capacity of 50 to 2000 people. The Metropolitan Area is specialising in the micro - seminar (200-500 people) segment of the business market.



3. *Shopping / entertainment tourism*: was the main tourism product of 'excellence' in the 1980's and 1990's. This was exclusively linked to the Venezuelan market because the exchange rate was favourable at the time. The current Venezuelan crisis has caused this product to rapidly decline. This product, which was once international, has now been reduced to a departmental product.
4. *Gastronomic tourism*: this is a product, which has grown rapidly over the last few years. The area offers an excellent culinary product in terms of quality and variety. The local restaurant association is trying to promote the gastronomy of the Department by organising annual gastronomic fairs, examining local traditional recipes, involving local population, and promoting training. This product is well integrated to other products, in particular MICE and transit tourism. With the exception of the annual gastronomic fair, this sector is not generating important domestic and international tourism flows.
5. *Health tourism*: this is another tourism product in its phase of development. Based on a study promoted by the Chamber of Commerce of Cúcuta, "*health tourism*" currently attracts more than a thousand patients and their families to the Metropolitan Area. Thanks to the "Free Zone" policy, there have been many investments in medical clinics and therefore the product is being developed to an international standard.
1. *Transit tourism*: this cannot really be classified as a tourism product, but the present tour packages to Isla Margarita (Venezuela) sold by local tour operators include 1 or 2 nights in Cúcuta and its Metropolitan Area. This tourism flow is generating an important impact on the local economy and cultural attractions (Santander's home museum, etc.), hotels and restaurants are benefiting from this. Tourists who pass through the area 'in transit' to another destination (namely Venezuela and especially the Margarita Island) could be turned into a significant tourism product and greatly increase its economic impact. However, this option would require that flights to be increased to improve connections to and from the main tourist destinations in the Region.
2. *Natural / Ecotourism*: even though the Metropolitan Area of Cúcuta has no relevant natural attractions, the Dept. of Norte de Santander has some that are very interesting. The effort made in recent years to identify specific natural routes has highlighted the development potential of this product. Given the lack of organisation, national tourism demand will be of a higher priority, than international demand.

Finally, different tourism studies promoted by local stakeholders (for example, *Chamber of Commerce of Cúcuta*, Municipality of Cúcuta, etc.) have identified historical tourism, health tourism and MICE tourism as the most important tourism products for investment for developing the tourism industry in the Metropolitan Area of Cúcuta.



4.6 Legislation and Tourism Organisation⁵

The National Development Plan 2014-2018 "*Together for a New Country*" is based on three pillars: i) Peace; ii) Equity; and iii) Education.

To consolidate the three pillars both transversal and regional strategies have been incorporated to establish priorities for territorial management and promote its development in other Colombian regions.

Colombia shares land and sea borders with 11 Latin American countries. 10% of the total population lives in border areas.

According to Law 191 of 1994, the border areas are "those municipalities, special districts of the border departments, adjacent to the boundaries of the Republic of Colombia and whose economic and social activities are the direct influence of border phenomenon." Norte de Santander is one of these 13 departments.

The Borders for Prosperity Plan PFP led by the Ministry of Foreign Affairs, acting as a coordinating body for the various agencies and entities of the National Government for 'the coordination and effectiveness of efforts and institutional interventions'. CONPES 3805, 2014 lays the groundwork for the implementation of the border policies and defines departments and border municipalities as 'duly authorised territorial nuclei', which can generate prosperity for the whole nation.

The Comprehensive Plan of Metropolitan Development (PIDM) 2012-2015, "Living Area, Sustainable Region" is an integration proposal which responds to the problems and prospects of development shared by the municipalities of the Metropolitan Area of Cúcuta.

Law 1558, 2012 amending Law 300 of 1996 and Law 1101 of 2006 "General Tourism Law, Chapter I, aims at the promotion, development and competitiveness of the sector and the regulation of the tourism activity. Art. 2 determines the importance of tourism for the development of the country's industry.

The organisation of the tourism sector under Art. 7, is defined by the creation of the Tourism Council, under the leadership of the Ministry of Commerce, Industry and Tourism. Art. 8 defines the creation of the Advisory Council of the Tourism Industry as a consultative and advisory body for the Government in tourism matters

On a regional and local level, Paragraph 2 of Chapter II, determines that the Governors and Mayors should support the creation of departmental, municipal and district tourism councils, which fulfils the same functions as the Consultative Council of Tourism on a territorial level.

⁵ This paragraph is a summary of the analysis carried out by Target Euro on the present tourism legislation in Colombia and the tourism organization in the metropolitan area of Cucuta. For more details about this topic, please see Annex 4



The relationship between the different actors for the coordination and implementation of strategies is closely linked with the Regional Commission of Competitiveness and Departmental Committee. Tourism is under the leadership of the Corporation for Joint Promotion between Norte de Santander and the Chamber of Commerce of Cúcuta.

It is important to note that the Chamber of Commerce exerts its natural leadership role that contributes to the articulation of public private actors in the region; it is also responsible for the management of information on tourism operators and the National Registry of Tourism entrepreneurs and businesses.

Finally, the key institutions that develop programs and projects to strengthen the tourism sector of Cúcuta and *Norte de Santander* and that they should be considered in the tourism development strategy are the following:

- Public Entities: Ministry of Culture and Tourism of Cúcuta, Ministry of Economic Development Department, SENA, Colombia Migration, ProColombia, Tourist Police
- Private entities: Cúcuta Chamber of Commerce, Corporation North Joint Promotion
- Association and Unions such as, COTELCO, ACODRES and ANATO.
- Airlines: Avianca, LAN and SATENA

5. Main Constraints

Interviews with key actors in the territory and the results of surveys with tour operators in the Metropolitan Area of Cúcuta show that the main issues affecting tourism development are:

- Organisation of the tourism system
- Weakness of tourism supply and demand
- Limited development of tourism facilities
- Planning and Development
- Security

1) Organisation of the Tourism system

The main constraints stated by local stakeholders and referring to the tourism organisation of the Metropolitan Area of Cúcuta are as follows:

- Weakness of public key actors. Public institutions recorded deficiencies at tourism development policy level; and tourism development planning instruments in the municipalities are limited. In addition, as already said before, tourism is not a priority in the present tourism policy yet.
- Limited collaboration between stakeholders. Many key actors in Cúcuta consider the collaboration between all stakeholders as a very important shortcoming of the tourism sector. Although the importance of working together for the development of competitive tourism is understood, those involved continue to work individually. Finally, the different tourism associations based in Cúcuta (hotels, restaurants, tour

operators, etc.) declared how difficult it is to collaborate with the public stakeholders and to involve them in a concrete tourism development strategy.

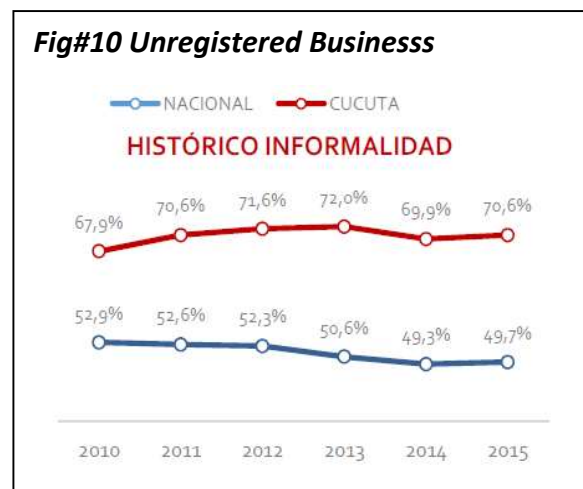
- Monitoring and control systems. Currently there is not an adequate tourism data collection system. This activity must be strengthened to support decision-making.

2) Weakness of tourism supply and demand

The main constraints stated by local stakeholders referring to the tourism supply and demand of the Metropolitan Area of Cúcuta are as follows:

- Products and tourist services. The current tourism products are the result of individual initiatives by key private actors and not the result of organisation and synergy between tourism stakeholders, which would be a more effective approach.
- Informality of tourism services.

According to data provided by the Cúcuta Chamber of Commerce, unregistered businesses and workers make up almost 71% of the city's informal economy. This percentage is almost 20% above the national average; therefore, we can assume that it also includes activities within the tourism sector. This informality effects quality and reliability of the tourism services and could undermine the efficiency of any tourism development strategy.



- Limited capacity management. This is also a consequence of the high level of informality. Activity training and awareness is needed for all actors working in the tourism industry in order to strengthen their capacities for planning tourism development.
- Lack of competence, professionalism and quality of service: all respondents agree that it will take a great deal of training at all levels and sectors to spread tourism culture among employees working in tourism enterprises.
- Lack of tourist entertainment opportunities. Excluding the weekly stroll along the *Malecon* and restaurants, actors agree that the Metropolitan Area of Cúcuta does not offer many entertainment opportunities (especially at night) to attract tourists out of their hotels.
- Limited promotion and commercialisation of the destination: Many stakeholders have stated that tourists and the international markets do not know the Metropolitan Area of Cúcuta yet. Both local and national governments are not promoting the area adequately and, so far, the image of the destination is still associated as dangerous area. All stakeholders agree that promotion is needed at national and regional level to stimulate tourists (especially the domestic demand) to visit the destination. In addition, many local tour operators and travel agencies are working on outgoing tourism (they mainly promote tourism packages to Margarita Island in Venezuela), while those specialised in incoming tourism are very limited. This is a consequence of the very small size of the present Tour Operators,



who do not have the financial or knowledge capacities to promote new tourism packages and itineraries for the Metropolitan Area of Cúcuta and its surrounding area.

3) Limited development of tourism facilities

These weaknesses are mainly referred to the following issues:

- Very limited tourist information system: There is very little tourism information available in the city and nearly all of it is in Spanish (nothing interpreted into other languages). An example is the Historic Temple where tourist information is “virtually non-existent”.
- Limited accessibility to tourism assets: many stakeholders complained about the absence or lack of basic infrastructure such as easy access to attractions outside the Metropolitan Area, etc.
- Absence of specific infrastructure: some actors have complained that the lack of infrastructures with tourist attraction potential, such as a convention centres for strengthening tourism business, or a theme park for leisure tourism. Other stakeholders do not consider it as a priority; however, they recognize the importance to develop a kind of “tourism interpretation centre” that could help tourists to understand the cultural and natural attractions of the Department of *Norte de Santander* and, at the same time, entertain tourists.
- Limited tourist signs: no adequate tourist signs are located in the Metropolitan Area and around tourism attractions. This calls for not only the development of an adequate tourism sign system, but also for the development of specific brochures that outline tours and tourism routes because the tourist may have difficulty in finding the tourism attractions.

4) Planning and Development

This mainly refers to urban planning. As shown by the analysis of the situation, the area has basic services but further interventions are necessary, combatable with tourism and urban development, to strengthen the urban planning of the Metropolitan Area of Cúcuta.

5) Security

Despite the efforts of all public and private stakeholders referring to this issue, security is still considered an important problem for the destination. The main complaints are referred to:

- Instability with the Venezuelan border: in this case, it is not just micro-crime, but also the difficulty for tour operators to continue to offer the Margarita Islands as a destination. Due to the problems with the border closure in late August and early September, the TOs in Cúcuta were forced to cancel thousands of packages that had been sold to the Colombian market.
- Citizen security: many respondents stated that the Metropolitan Area of Cúcuta is uncertain and requires a major effort by the authorities to ensure the security of citizens and tourists, especially in main tourism areas at night.



6. SWOT Analysis

Following the classical methodology of the SWOT matrix, the main strengths, weaknesses, opportunities and threats of the Metropolitan Area of Cúcuta are identified in the present analysis. This methodology is a critical approach in order to summarise and highlight the main problems affecting the present tourism industry in the destination and to clearly identify the opportunities and threats to be considered for its long-term development.

The SWOT analysis should be considered as the starting point of the Tourism Development Strategy for the Metropolitan Area of Cúcuta, consisting of the identification of the “development objectives” and the formulation of the Tourism Development Strategy.

STRENGTHS	WEAKNESSES
<ol style="list-style-type: none"> 1. Presence of some very high quality tourism enterprises, especially hotels and restaurants that are promoting new tourism services (MICE, health tourism, etc.) 2. Presence of “free zone” (the most important in the Country) which are stimulating investments in tourism sector (especially, health tourism) 	<ol style="list-style-type: none"> 1. Limited skills and competences of the tourism stakeholders, especially for public sector 2. Very limited tourism statistic system and availability of data on tourism industry 3. Lack of collaboration between all tourism stakeholders, especially between public and private tourism stakeholders 4. Very high informality of the tourism economy 5. Decline of the main tourism product (trade), and incapacity of local tourism stakeholders to diversify the present tourism supply 6. Limited competitiveness of local tour operators (mainly micro enterprises with very limited commercialisation abilities) 7. Very limited interpretation system (including information, tourism signals, etc.) 8. Bad image of the destination at national and international level 9. Despite the urban development promoted by local government, further interventions are necessary combatable with tourism and urban development in the AMC



OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> a. Interest of the National Government and <i>Plan Frontera</i> to develop the Metropolitan Area of Cúcuta as a tourism destination. b. 200 year anniversary of the signature of the Constitution of Gran Colombia c. Interest of local tour operators and other tourism stakeholders to diversify the present tourism supply, valorising local tourism assets and focusing on domestic tourists 	<ul style="list-style-type: none"> 1. Enduring international economic instability (LATAM and Europe) 2. Enduring instability with the Venezuelan border 3. Growth of local criminality and instability in terms of security; 4. Enduring international insecurity (terrorism, etc.) 5. New tourism destinations in Latin America are capturing the interest of the main markets actually interested in Colombia 6. Limited interest of local government demonstrated so far to tourism industry

Conclusion:

The analysis of the present situation shows many limits and very few strengths of the tourism sector. However, there are very good opportunities to develop it in the short/medium term especially considering the cultural activities that could be linked to the 200 year anniversary of the signature of the Constitution of Gran Colombia.

The present tourism product portfolio is still disorganised, with limited competitiveness at national and international level, and often the tourism assets of the destination are simply used as secondary attractions for tourists in transit to other destinations (Isla Margarita).

The cultural quality of the site (especially, its main cultural assets: House of General Santander and the Historic Temple) is not questioned. However, their long-term sustainability is extremely weak if they are not integrated into an articulated supply that involves all local tourism stakeholders. The emerging demand for culture focuses on the need of experiencing a site and its community in their normal dynamics, ‘from the inside’. It means that, also when we consider tourist demand, the focus of any action aimed at sustainable growth of local culture must start from the identity, needs and expectations of the local community. Although the ‘structured’ heritage keeps its crucial importance, what is normally defined as the ‘intangible heritage’ becomes fundamental in providing cultural consumers with knowledge and experience of the living culture of any site. From the performing arts to the production of handicrafts, from literature and poetry to gastronomy, the routine and rituals of the local community becomes the object of a shared experience where cultural consumers get unique benefits. For this reason, the interpretation of the cultural and natural assets must be considered of great importance for the organisation of the cultural tourism product.



7. Tourism Development Policy and Strategy for the Metropolitan Area of Cúcuta

7.1 Tourism development objectives

Due to the very limited tourism development of the Metropolitan Area of Cúcuta, it is difficult to define a set of quantitative objectives in terms of tourists visiting the destination or number of accommodations to be developed. Therefore, Target Euro considers it more appropriate to identify objectives aligned with the purpose of the present strategy in order to stimulate tourism development in the project area.

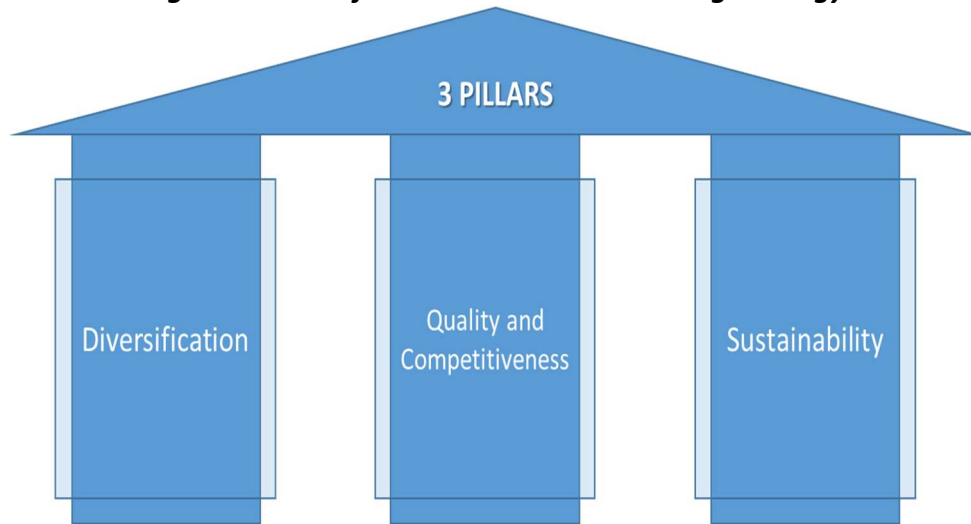
Based on this assumption, the objectives of the Tourism Development Strategy of the Metropolitan Area of Cúcuta are to:

- a. Diversify the present tourism supply, developing new tourism products and strengthening the existing ones;
- b. Transform the Metropolitan Area of Cúcuta from a “transit” destination to one of the most important cultural destinations in the Country (the place where the Gran Colombia was born);
- c. Create a favourable business environment and stimulate tourism investments, especially referring to private sector and local communities;
- d. Increase the quality of the tourism services and facilities, adapting them for a medium – high level tourism demand;
- e. Strengthen the present competitiveness of the tourism enterprises;
- f. Develop a new image for the Metropolitan Area of Cúcuta;
- g. Stimulate knowledge of the destination on a national and, more importantly, international level;
- h. Improve collaboration between private and public tourism stakeholders and improve / stimulate the communication between the different stakeholders involved in tourism development.

7.2 Pillars of the Tourism Development Strategy

Based on the individual meetings and workshops carried out by Target Euro with local tourism stakeholders, the following three pillars have been identified as the issues that should drive the Tourism Development Strategy of the Metropolitan Area of Cúcuta.

Fig#11: Pillars of the tourism and marketing strategy



7.2.1 Diversification

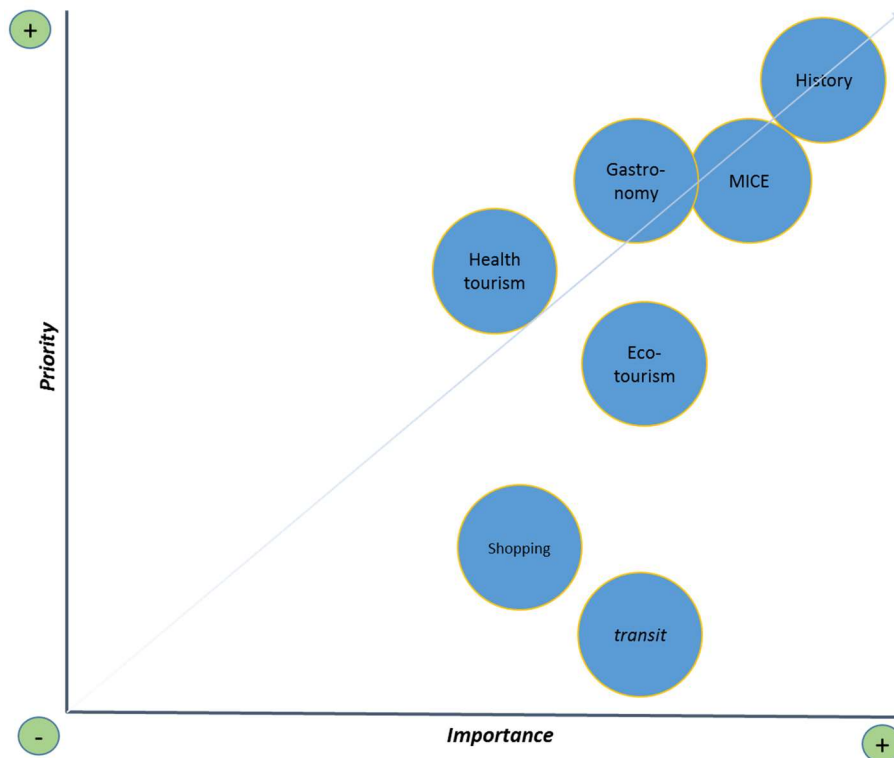
Based on the analysis and discussions with the local stakeholders, it is clear that “diversification” is a very important pillar of the tourism strategy and it must be understood in a broader sense to include tourism services, attractions, tourism facilities, marketing.

Diversification has to be achieved through the full implication of the cultural assets (historical and archaeological sites, cultural heritage, etc.) into the tourism supply and their integration / connection with the important natural resources and other cultural destinations of the Department of *Norte de Santander*.

This means that the diversification strategy passes through the development and organisation of tourism products that allow tourism stakeholders to transform the Metropolitan Area of Cúcuta from a simple "transit" destination into a destination that offers a specific and unique form of tourism.

Based on the present tourism products in the destination, History, MICE and Gastronomy are the tourism products with the highest priority and importance. These products already exist but they need to be strengthened in the national and international tourism market.

Fig#12: Tourism products by priority and importance



The 200th anniversary of the signing of the Constitution of Gran Colombia is an excellent opportunity to include local history as a major tourism product in the Metropolitan Area of Cúcuta, and launch this product on a national and international level. This is the most important tourism product of the Metropolitan Area of Cúcuta.

Ecotourism and Health tourism are emerging products that will be very important for the diversification of the present tourism supply. In addition, Ecotourism will allow the destination to integrate its urban offer into the natural assets around the Department of *Norte de Santander*.

Transit and Shopping represent what the destination has supplied so far. They will be relatively important during the first stage of the strategy implementation because they generate some tourism flows that could be used to stimulate diversification towards the other tourism products. However, in the long term, they will be tourism products with relatively low importance and priority⁶.

7.2.2 Quality and Coopetition

Tourism is a complex and articulated industry where a multivariate group of key actors (public institution; large, medium, small and micro enterprises, local community and civil

⁶ Please, see Annex 6 for more details about the characteristics of the tourism products of the Metropolitan Area of Cucuta and their tourism segments and markets; and commercialization channels.

society) have to work together to organise the tourism products that will be promoted in the tourism markets. This complexity is the consequence of the characteristics of the tourism products. As already stated before, a tourism product is composed of a *combination of tourism assets and services* and, for this reason, independent tourism entrepreneurs and public stakeholders decide individually how, when and who participate for its organisation. It means that collaboration between stakeholders is needed for a tourism destination; otherwise, it is impossible to develop tourism products.

A key reason for the growing interest in partnerships in tourism development is the belief that tourist destination areas and organisations may be able to gain competitive advantages by bringing together their knowledge, expertise, capital and other resources of several stakeholders (Kotler et al., 1993).

Based on this assumption, “**coopetition**” becomes the third pillar of the Tourism Development Strategy for the Metropolitan Area of Cúcuta. “Coopetition” is a methodology based on the competitive cooperation between businesses in a tourism destination. It is a process where all stakeholders work together and at the same time competing within the same market. The collaboration allows key actors to organise an articulated and complete tourism offer, while the competitive side of this methodology insures businesses and entrepreneurs are permanently stimulated to develop and/or improve high quality tourism services.

Fig#13: Co-opetition



This is an important issue of the tourism strategy, because as shown by the analysis of the present situation in the Metropolitan Area of Cúcuta, local tourism stakeholders do not collaborate enough. This lack of collaboration mainly refers to the relations between public and private stakeholders; however, it also includes the relations between the tourism entrepreneurs themselves.

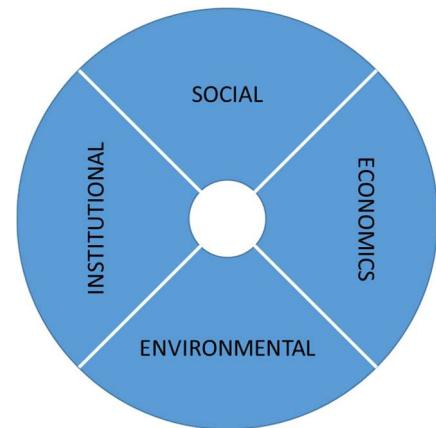
7.2.3 Sustainability

A correct understanding of the meaning of sustainable tourism means is very important for tourism planners, especially because tourism is often promoted as the best solution to sustainable development. However, this is not certain, in fact, while it brings development to more remote and hence poorer regions, it has not yet been proven that it generates less damage and more benefits than other economic sectors. This aspect of the tourism industry has to be taken into consideration by the tourism planners, especially referring to the evaluation of the potentially negative impacts that tourism can bring to local communities and cultural and natural assets that are often very fragile.

Sustainability is a long and winding path that must be undertaken by tourism stakeholders in which priority should be given to those activities that allow for a good balance between the preservation of the culture and environment and socio-economic development for the local communities and enterprises. Based on the present assumption, the Tourism Development Strategy of the Metropolitan Area of Cúcuta will be based on the so-called “Circle of Sustainability”, including Social, Economic, Environmental and Institutional Sustainability.

- Social sustainability: mainly refers to the need to avoid the “commodification of local culture” for tourism purposes. Tourism development in the Metropolitan Area of Cúcuta needs to involve local public and private tourism stakeholders with the aim of valorising and protecting local culture and heritage. It has to minimise the negative impacts that the tourism sector could generate at a local level, such as conflict with other cultural activities, depredation of the historical findings and attractions, etc.
- Economic Sustainability: refers to the opportunity to increase the revenues of the present tourism enterprises and develop new options by creating employment & small business options for local communities. In addition, it also refers to the necessity for the national and local government to develop an investment friendly environment with the purpose of stimulating private investors to run new tourism businesses in the destination.
- Environmental sustainability: it is one of the most important elements of this pillar, especially considering that all natural areas in and around the destination will be useful for the diversification of the present tourism supply. In addition, environmental sustainability refers not only to the preservation of nature in the destination, but also the necessity to preserve the cultural and historical assets of Cúcuta and its Metropolitan Area as a preliminary condition to promote tourism development. More efforts by all public and private stakeholders are required against excessive exploitation and environmental contamination of the tourism areas in the destination.
- Institutional sustainability: refers not only to the ability of the policy makers to conceptualise and implement a suitable regulatory framework that can contribute to the development of the tourism sector in the Metropolitan Area of Cúcuta, but specifically to the necessity to active collaborative processes involving all local stakeholders. Considering this last issue, there are many institutional options that are implemented by tourism destinations; however, the tourism development of the Metropolitan Area of Cúcuta should be managed in a way that renders it economically self-sustainable and representative of all public and private stakeholders in the project area.

Fig#13: Circle of Sustainability





It will be necessary to pursue sustainability in order to activate a long-term process that can be activated immediately therefore, achieving all the objectives expected from tourism development.

8. Action Plan

Considering the three pillars of the Tourism Development Strategy of the Metropolitan Area of Cúcuta and the analysis of the situation, the present chapter includes the activities local stakeholders should implement for the development of the tourism industry in the destination.

Based on discussions with local stakeholders, the activities of the Action Plan for the implementation of the tourism development strategy of the Metropolitan Area of Cúcuta are organised in the following four components:

- Institutional Strengthening
- Infrastructure Development
- Tourism Product Development
- Promotion and Marketing

1. Institutional Strengthening:

Action 1	Activate continuous training processes to involve all levels of public and private sector
Activities:	<ul style="list-style-type: none"> - Agreement with Universities and other training institutions - Signing of a “manifesto” between private and public stakeholders - Training activities (including, destination planning management, tourism customer care, foreign languages, local culture and traditions, etc.) - Organisation of a twining program (for public officers) with other tourism destinations
Action 2	Organisation of the local Tourism Committee, as requested by the national tourism law
Activities:	<ul style="list-style-type: none"> - Identification of key stakeholders - Organisation of the Tourism Committee, including tasks and duties - Permanent dissemination of the information to all local stakeholders
Action 3	Development of a new curriculum for the tourism industry
Activities:	<ul style="list-style-type: none"> - Definition of new specialised curriculum for tourism schools and universities - Stimulate partnership between tourism private and public stakeholders and universities to activate internship programs.
Action 4	Build a shared vision for development of the tourism destination between public and private stakeholders and local community
Activities:	<ul style="list-style-type: none"> - Organisation of seminars and forum on tourism industry



	- Organisation of “tourism days”, involving all tourism stakeholders
Action 5	Promote awareness and visibility of tangible and intangible cultural heritage among the population of the Department of Norte de Santander
Activities:	<ul style="list-style-type: none"> - Organisation of a “heritage day” for the destination - Organisation of awareness campaigns in local schools and colleges
Action 6	Promote the use of "social networks", not only to multiply the promotional effect, but also to accelerate the process of internal communication between different actors
Activities:	<ul style="list-style-type: none"> - Special social network training for tourism entrepreneurs - Identification and implementation of internet solutions (platform, etc.) that can help local stakeholders use social networks as tools to facilitate communication and the exchange of information between all stakeholders
Action 7	Organisation of monitoring, evaluation and control systems
Activities:	<ul style="list-style-type: none"> - Organisation of a tourism observatory
Action 8	Organisation of Destination Management Organisation that will manage the tourism industry in the destination after project completion.
Activities:	<ul style="list-style-type: none"> - Awareness campaign addressed to all local tourism stakeholders - Signing of a “framework agreement” between all interested key players - Definition of the business plan of the DMO - Registration of the DMO based on the national law - Launching of the DMO

2. Infrastructure development

Action 9	Development of a “Metropolitan Identity” for the destination
Activities:	<ul style="list-style-type: none"> - Identification and selection of all present project ideas which allow stakeholders to coordinate public spaces with the most important tourism products - Organisation of a technical round table involving all interested stakeholders
Action 10	Stimulate private and public-private investments for infrastructure development and strategic services for the tourism offer in the Metropolitan Area of Cúcuta
Activities:	<ul style="list-style-type: none"> - Technical assistance fund for medium and large tourism enterprises and public entities in the Metropolitan Area of Cúcuta to develop strategic tourism infrastructure / facilities within the destination. - Strengthening local legislation for the “free zone” - Organisation of a “donors round table” (e.g. Parque del ‘800)



Action 11	Stimulate private and public-private investments for the preservation, and valorisation of the historical and architectural heritage of the Metropolitan Area of Cúcuta
Activities:	<ul style="list-style-type: none">- Conceptualisation and distribution of guides referring to the historical buildings and traditional architecture of the Metropolitan Area- Awareness campaign- Organisation of the cultural day

3. Tourism product development

Action 12	Interpretation of all the main tourist attractions to optimise information for tourists and tourism businesses in the territory
Activities:	<ul style="list-style-type: none">- Interpretation, classification and registration of tangible and intangible patrimony- Dissemination of information through books, brochures, flyers, etc.
Action 13	Strengthen existing services and develop new services for each specific product
Activities:	<ul style="list-style-type: none">- Technical assistance fund for small and micro tourism enterprises to improve the quality of their services and develop new tourism services for the national and international tourism demand
Action 14	Stimulate local tourism stakeholders to organise tourism product clubs, tourist clusters, tourism roads, etc. and stimulate alliances with other tourist destinations
Activities:	<ul style="list-style-type: none">- Technical Assistance Fund for small and micro tourism enterprises and other associations and/or institutions to organise multi-sectorial networks specialised in specific tourism products- Special fund for financing “Call for Proposals” of local non-profit institutions (Municipalities of the Metropolitan Area, foundations, etc.) in order to develop the present tourism supply and related tourism facilities and services
Action 15	Strengthen technical assistance to help micro entrepreneurs to legalise their business
Activities:	<ul style="list-style-type: none">- Optimisation of the information about tourism laws- Special training for public officials- Awareness campaign for tourism entrepreneurs and employees- Technical assistance for the legalisation process- Organisation of a “special task force”
Action 16	Strengthen air accessibility in terms of number of destinations (domestic and international)
Activities:	<ul style="list-style-type: none">- Agreement with national and international air companies to open new connection flights to new markets of origin of the tourism demand



Action 17	Develop / strengthen all forms of tourism signs
Activities:	<ul style="list-style-type: none">- Conceptualisation, design and installation of tourism signals and panels all around the most important tourism assets and the Metropolitan Area

4. Promotion and Marketing

Action 18	Branding strategy
Activities:	<ul style="list-style-type: none">- Conceptualise a marketing strategy based on the identification of landmarks, not only for the brand but to also to provide a participatory and consensual "common goal" and that will help position the area on the national and international market
Action 19	Strengthening of the commercialisation activities on the market
Activities:	<ul style="list-style-type: none">- e-Commerce and Sustainable Cultural Tourism Development Platform- Participation in national and regional tourism fairs- Organisation of educational tours, fam-trips, etc.
Action 20	Strengthening of the local tour operators and travels agencies
Activities:	<ul style="list-style-type: none">- Special training for employees of local tour operators and travel agencies (new tourism product in the destination)- Technical assistance fund to stimulate TT.OO and TA to develop incoming tourism
Action 21	Promotion
Activities:	<ul style="list-style-type: none">- Organisation of a communication campaign at national and regional level- Use of social media

Pilot project:

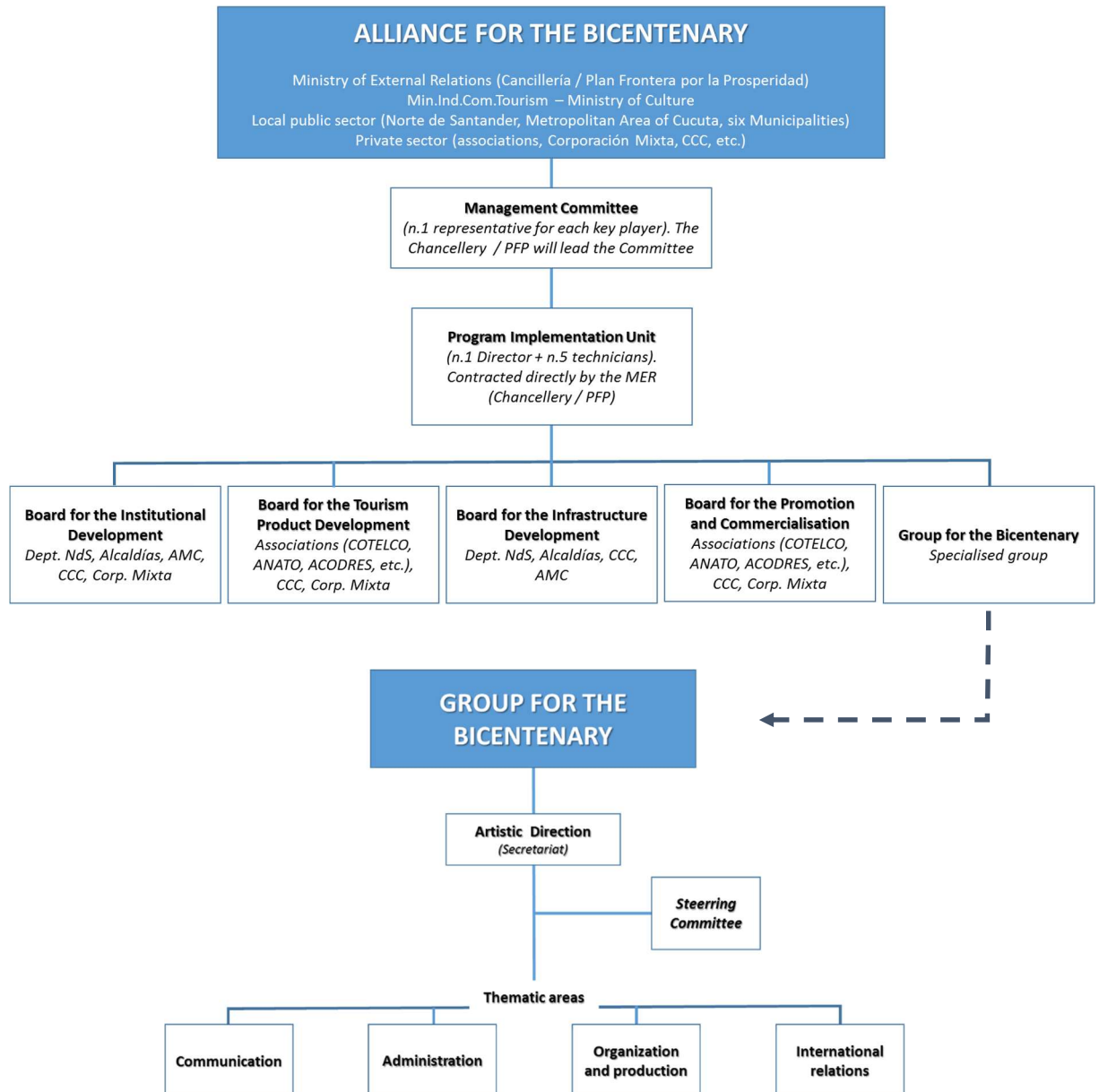
The organisation of one-year event for the commemoration of the 200-year anniversary of the signature of the Constitution of Gran Colombia could be a strategic action to definitively launch the tourism supply of the Metropolitan Area of Cúcuta on a national and international level.

Please, see Annex 7 for all details about all activities included in the Action Plan.



9. Program management

The implementation of the program will be under the responsibility of the Ministry of the External Relations, with the program called “Plan Frontera por la Prosperidad” and will involve all local stakeholders as detailed in the graphic below:



For more details about the implementation of the Tourism Development Strategy of the Metropolitan Area of Cúcuta, please, see Annex 8 (Implementation methodology) and Annex 9 (Working plan).



10. Estimated budget

Total estimated budget for the implementation of the Action Plan is around **12.8 billion Colombian pesos**, as shown in the table below. This amount does not include the organisation of the Bicentenary event.

ID	Activity	COP
Action 1	Activate continuous training processes to involve all levels of public and private sector	926.500.000
Action 2	Organisation of the local Tourism Committee, as requested by the national tourism law	18.500.000
Action 3	Development of new curricula for the tourism industry	86.000.000
Action 4	Build a shared vision for development of the tourism destination between public and private stakeholders and local community	100.000.000
Action 5	Promote awareness and visibility of tangible and intangible cultural heritage among the population of the Department of Norte de Santander	345.000.000
Action 6	Promote the use of "social networks", not only to multiply the promotional effect, but also to accelerate the process of internal communication between the different actors	100.000.000
Action 7	Organisation of monitoring, evaluation and control systems	755.000.000
Action 8	Organization of a Destination Management Organisation that will manage the tourism industry in the destination after project completion.	105.000.000
Action 9	Development of a "metropolitan identity" of the destination	385.000.000
Action 10	Stimulate private and public-private investments for infrastructure development and strategic services for the tourism offer in the Metropolitan Area of Cúcuta	703.000.000
Action 11	Stimulate private and public-private investments for the preservation, and valorisation of the historical and architectural heritage of the Metropolitan Area of Cúcuta	325.000.000
Action 12	Interpretation of all the main tourist attractions to optimise information for tourists and tourism businesses in the territory	215.000.000
Action 13	Strengthen existing services and develop new services for each specific product	1.866.000.000
Action 14	Stimulating local tourism stakeholders to organise tourism product clubs, tourist clusters, tourism roads, etc. and stimulate alliances with other tourist destinations	1.266.000.000
Action 15	Strengthen technical assistance to help micro entrepreneurs to legalise their business	261.500.000
Action 16	Strengthen air accessibility in terms of number of destinations (domestic and international)	90.000.000
Action 17	Develop / strengthen all forms of tourism signs	396.500.000
Action 18	Branding strategy	660.000.000
Action 19	Strengthening of the commercialisation activities on the market	750.000.000
Action 20	Strengthening of the local tour operators and travels agencies	455.000.000
Action 21	Promotion	960.000.000
	<i>Project Implementation Unit</i>	<i>2.061.500.000</i>
	SUB TOTAL ACTION PLAN	12.830.500.000
Pilot project:	Bicentenary	64.750.000.000
	GRAND TOTAL	77.580.500.000

For more details about the estimated budget, please, see Annex 10.