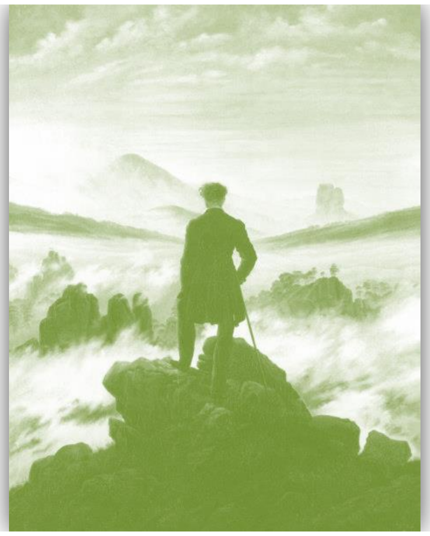
Report on
Territorial context analysis

Partner n. 2
Tuscany Region



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1. General Description of Tuscany - Demography

The reference area, hereinafter referred to as “Costa di Toscana”, consists of the five districts on the Tyrrenian Coast of Tuscany; from north to south, there are Massa Carrara district, Lucca district, Pisa district, Livorno district and Grosseto district. This area, which comprises 134 municipalities, runs a surface of more than eleven thousand square kilometres, of about 48% of the entire regional territory.

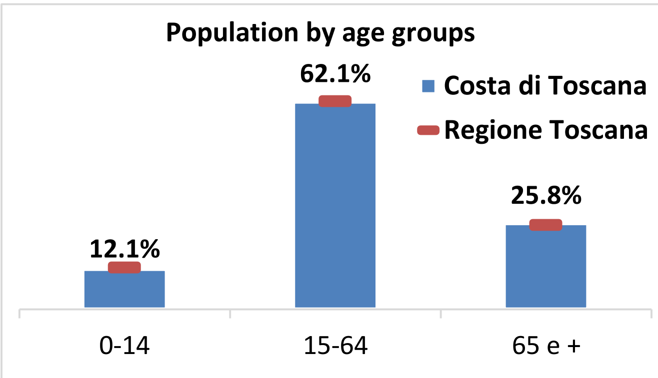
According to ISTAT data, pertaining to the month of January 2018, the population consists of 1.564 million residents (of about 42% of Tuscany) with a density of 141.1/km^2, a significantly lower value than the regional one (162.5/km^2).

SOCIO-ECONOMIC INDICATORS

Municipalities involved	134
Land area (Km2)	11.089.5
Local population (ISTAT, 01/2018)	1.564.286
Local population - % change (2018/2010)	-0.9%
Population density (Pop/Km^2)	141.1

The local population

- The total amount of residents in Costa di Toscana declined by 0.9% from 2010 to 2017. Quite the opposite, Regione Toscana showed a growth of 0.2%.
- The coastal population is subject to a gradual ageing and the senior citizens have far exceeded a quarter of the total. The same goes for the Tuscan, the Italian and the European ones.
- The average age is 47 years, greater than the Tuscany’s one (46.3 years).



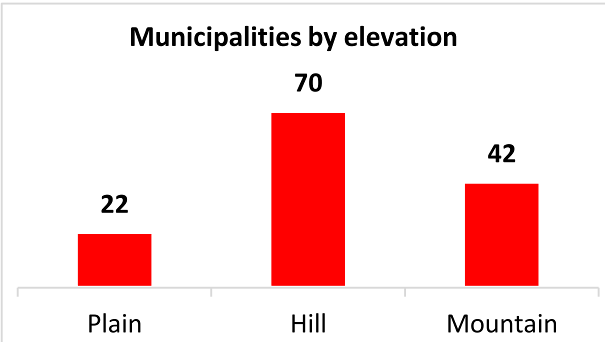
The main features of the territory and the coast

- ISTAT shall allocate each Italian municipalities according to the peculiar altitude. Along this classification, more than half of coastal municipalities are “hilly”, 22 of these are mostly flat and 42 of these may be defined “mountain”.

Surface by altitude – % value

Altitudinal range (MASL)	Costa di Toscana	Tuscany
0 – 299	61.4	54.7
300-599	19.3	24.9
600-899	11.0	12.2
900-1,199	5.1	5.4
1,200-1.499	2.3	2.0
1.500-1,999	0.8	0.7
>=2,000	0.0	0.0
Total	**100.0**	**100.0**

Source: Istat



- From north to south, including the many islands of the archipelago, Tuscan coastline is 633 kilometres long (about 8% of the Italian coasts) and largely swimming; there are also several marine reserves which preserve coast by harmful side effects often driven by human activities.
- The continental coast is characterised by a very heterogeneous littoral. The northern area, which includes the districts of Massa Carrara, Lucca and Pisa, is affected by a sandy and low stretch of coast. Instead, the coastlines of the districts of Livorno and Grosseto are more varied since there are both rocky shores and wide stretches of beaches.

FOCUS ON LIVORNO DISTRICT

Municipalities involves	19
Land area (Km2)	1,214
Local population (ISTAT, 01/2018)	336,215
Local population - % change (2018/2010)	-1.5%
Population density (Pop/Km2)	277.0

2. Economy and Labour Market

(source: Regione Toscana, Irpet)

The manufacturing structure of Costa di Toscana, as well as of Regione Toscana, is based on agriculture, industry and tourism. It is founded on medium and small and medium-sized enterprises and few bigger industrial areas; It is supported by local investments, even if in the last years foreign investments increased both thanks to the attractiveness of the area and to the tailor-made strategies and policies put in hand by the Tuscany Regional Council.

However, Costa di Toscana has a manufacturing structure substantially weaker than Central Tuscany's one. That means a negative impact on the workplace opportunities, especially for young people, and on the income. The gap intensified greatly as a result of the global economic crisis afflicting the financial markets which has unfolded since 2008, with the sharpest drops in production observed in the whole industry sector (manufacturing and construction).

Costa di Toscana is not a homogeneous geographical area, but incorporates very different local systems, from the hilly inland areas to the whole coastline. Nevertheless, it is possible devise a distinctive characteristic of the diverse coastal areas, that is the under-exploited development potential. In many instances, the relatively economic weakness of these areas is not due to a structural deficit of the growth factors since often they are densely populated, characterised by the presence of fine services, transport infrastructures that will facilitate their accessibility and, last but not least, several attractive touristic assets such as the sea, the art heritage cities and areas of environmental value. The real problem lies in the ability to mobilise these factors, namely: consolidating current specialties, strengthening and modernising the infrastructure, intensifying trade and cooperation relations between different systems, supporting research and experimentation on production and settlement models with low environmental impact.

Specialties, skills and territorial assets of Costa di Toscana

<table>
<tr><td>▸ Transport by sea and inland waterway
▸ Storage and support activities to trasport
▸ Shipbuilding industry</td><td rowspan="2">▸ Metallurgy
▸ Refined petroleum products
▸ Manufacture of motor vehicles, trailers and semi-trailers
▸ Production of chemicals
▸ Extractive
▸ Manufacture of other non-metallic mineral products</td></tr>
<tr><td>▸ Accommodation and food service activities
▸ Retail trade
▸ Sports activities and amusement and recreation activities</td></tr>
<tr><td>▸ Water collection, treatment and supply
▸ Waste collection, treatment and disposal activities</td><td>▸ Agriculture</td></tr>
</table>

Reviving the economy of Costa di Toscana is a main regional project in the Regional Development Plan (RDP) 2016-2020, which has a total budget of EUR 135 million, worth 2% of all resources. However, coastal areas may benefit also from other resources dedicated to thematic investments, like for large infrastructures (almost EUR 3 billion), for sea policies, for cultural attractors, for social inclusion, etc.

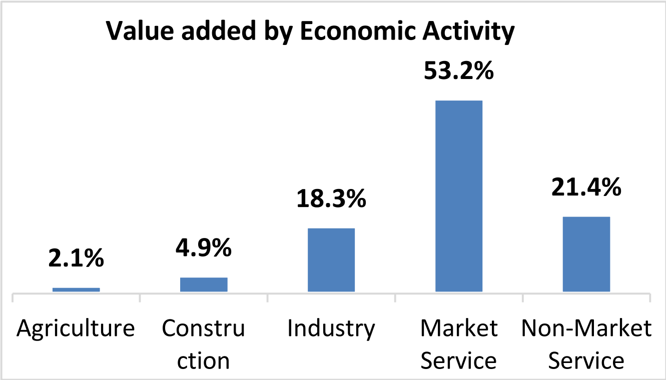
EUROPEAN MACRO OBJECTIVES BY 2020 (PRS 2016 – 2020)	**SUPPORT REGIONAL PROJECT TO THE COSTA'S GROWTH BY 2020**
▸ EMPLOYEMENT: 75% of the population between 20 and 64 years of age mast have work (Italy 67%) ▸ R&D INVESTMENT: investing 3% of GDP (Italy 1,53%) in R&D ▸ ENVIRONMENT & ENERGY: reducing greenhouse-gas emissions by 20%; achieving a 20% share for renewables in the EU energy mix (Italy 17%); improving energy efficiency by 20% ▸ SCHOOL DROP-OUT: reducing the school drop-out rate to 13% (Italy 16%) ▸ UNIVERSITY EDUCATION: almost 40% of people between 30 and 34 years of age (Italy 26%) ▸ POVERTY: reducing the number of people at risk of poverty and social exclusion by 20 million	▸ REINDUSTRIALISATION: Tuscany spent early a deindustrialisation process , while being one of the most industrialised regions of Italy ▸ REDUCTION OF TERRITORIAL DISPARITIES: reducing economic disparities, ensuring accessibility e improving transport services ▸ DEFENCE OF THE TERRITORY/SUSTAINABLE LAND USE

Value-added at current prices

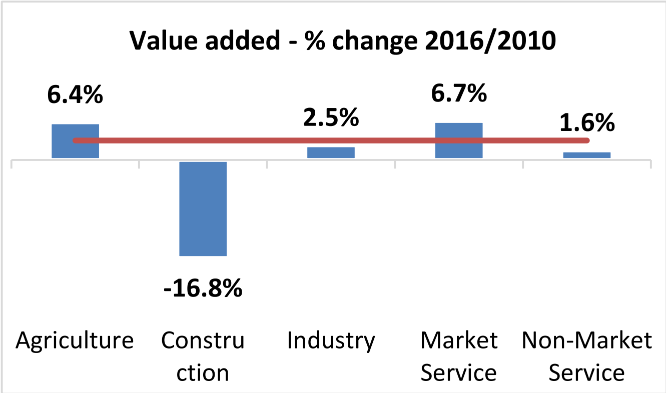
- In 2016, the added value of Costa di Toscana have exceeded EUR 38 billion, amounting to 37.9% of the Tuscan added value.
- 53% was accounted for by the "market services" sector (transport, trade, accommodation and food service activities, finance and insurance, real estate business, etc.).
- Costa di Toscana's contribution to the VA of the region tends to increase in construction sector and "non-market services".
- From 2010 to 2016 Costa di Toscana's VA grew by 3.4% (Tuscany +6.6%); the most dynamic sectors of the economy were agriculture, soared by +6.4% (Tuscany +13.3%) and non-market services, with +6.7% growth (Tuscany +9.6%).

Economic activity	VA 2016 (MM €)	% of Toscana
Agriculture	810.5	35.4%
Construction	1,883.6	42.2%
Industry	6,990.4	34.5%
Market Services	20,319.8	37.3%
Non-Market Services	8,191.9	42.1%
Total	**38,196.1**	**37.9%**

Source: Istat



% change value added for economic activity



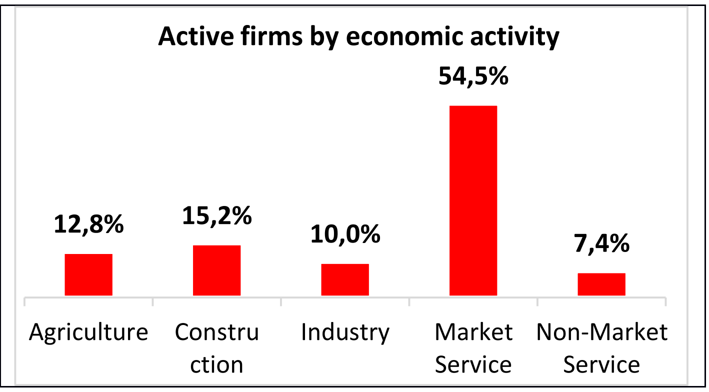
Active firms

- According to the Infocamere – Movimprese database, in 2017 over 146 thousand active firms have been registered in Costa di Toscana, equal to 41.3% of the total amount of Tuscany.
- Here too, the most representative sectors concern "market service" (54.5%) and, to follow, construction, manufacture and agriculture.
- Compared to the regional situation, Costa di Toscana's specialties by total amount of active firms relate to agriculture (46.7% of which located within the coastal area) and to non-market services, whereas the manufacture industry has less relevance.
  - Active firms recorded a negative trend of 3.8% from 2010 to 2017 (Tuscany -3.3%); The sectors most affected were industrial production as a whole, specifically with -18.0% for construction and -9.7% for other activities (as 17.0% and -6.4%

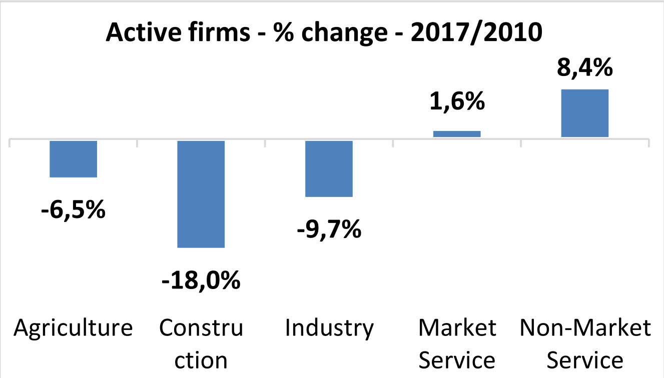
respectively of the total region's value), and agriculture with -6.5% (Tuscany -6.7%); on the contrary, market and non-market service have been strengthened.

Economic activity	Active firms 2017	% Toscana
Agriculture	18,743	46.7%
Construction	22,265	41.2%
Industry	14,654	30.6%
Market Services	79,766	42.4%
Non-Market Services	10,865	44.6%
Not classified	33	22.4%
Total	**146,326**	**41.3%**

Source: Infocamere - Movimprese



% change active firms by economic activity



- Further, a breakdown by industries of Costa di Toscana's active firms.
- We should stress the importance of trade activities, wholesale and retail, that represent the 27.0% of the total amount of the coastal area (Tuscany 25.0) and the significant growth of accommodation and food and beverage businesses (+9.2%, compared to Tuscany +12,3%).

Costa di Toscana's active firms by economic activity

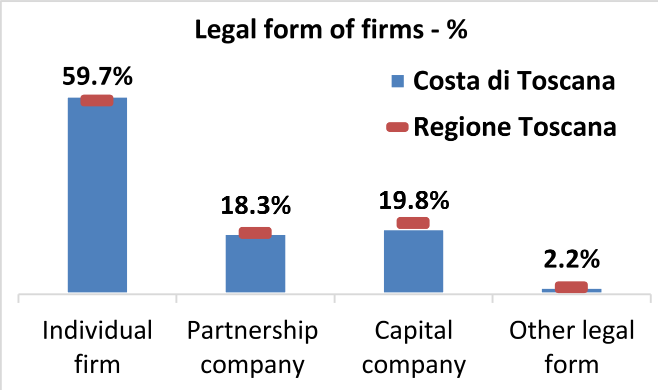
Economic activity	2017	%	% change 2017/2010
Agriculture, forestry and fishing	18,743	12.8%	-6.5%
Mining and quarrying	207	0.1%	-11.2%
Manufacturing	13,943	9.5%	-10.5%
Electricity, gas, steam and air conditioning supply	188	0.1%	121.2%

Water supply sewerage, waste management ...	316	0.2%	-6.8%
Construction	22,265	15.2%	-18.0%
Wholesale and retail trade, ...	39,466	27.0%	-3.0%
Transportation and storage	3,804	2.6%	-10.8%
Accommodation and food service activities	13,431	9.2%	9.8%
Information and communication	2,775	1.9%	5.8%
Financial and insurance activities	3,206	2.2%	6.7%
Real estate activities	7,664	5.2%	-2.2%
Professional, scientific and technical activities	3,943	2.7%	9.0%
Administrative and support service activities	5,477	3.7%	28.8%
Public administration and defence, ...	3	0.0%	/
Education	633	0.4%	13.4%
Human health and social work activities	673	0.5%	36.0%
Arts, entertainment and recreation	2,767	1.9%	10.3%
Other service activities	6,788	4.6%	5.0%
Activities of households as employers, ...	1	0.0%	/
Unclassified firms	33	0.0%	-82.2%
Total	146,326	100%	-3.8%

Source: Infocamere - Movimprese

- The legal framework of Costa di Toscana's active firms coincides with the sole proprietors and unincorporated partnerships model. The same is true of Tuscany, despite the slightly higher incidence of limited companies.
- Over the last several years, more structures companies have shown a positive trend whereas both individual firms and partnership decreased.

Costa di Toscana's active firms by legal form



Legal form	% change 2017/2010
Individual firm	-7.8%
Partnership company	-11.2%
Capital company	+19.7%
Other legal form	+5.6%
Total	**-3.8%**

Employement

- Finally, according to ISTAT official estimates (labour force survey), the number of people employed in Costa di Toscana decreased to 642 thousands by the end of 2017, equal to 40.6% of Tuscany's total (employees 74.3%, self-employed persons 25,7%).
- 70.8% of employees work in service industry (Tuscany 70.3%), 22.2% in trade, tourist accommodation and food and beverage (Tuscany 22.1%)
- The industrial activities collect the 25.2% of the employees (Tuscany 26.7%), while the agriculture no more than 4.0% (Tuscany 3.1%).
- Compared to 2010, the number of employees increased by 2.7% (Tuscany +3.0%); agriculture, manufacturing and other services were the most dynamic sectors.

Costa di Toscana's employees by economic activity – Year 2017 (k)

Economic activity	Employees	Self-Employed	Total	% change 2017/2010
Agriculture	10	16	26	*+8.3%*
Construction	22	21	42	*-30.3%*
Industrial activities	104	16	120	*+22.9%*
Trade, hotels and restaurants	88	55	143	*-8.7%*
Other services activity	254	58	312	*+8.6%*
Total	477	165	642	*+2.7%*

Source: Istat

FOCUS ON LIVORNO DISTRICT

Value added at current prices

Economic activity	VA 2016 (MM €)	% change 2016/2010
Agriculture	135.3	10.1%
Construction	346.2	-20.5%
Industrial activities	1,039.6	-12.6%
Market Services	4,671.5	11.8%
Non-Market Services	1,828.0	-2.0%
Total	**8,020.6**	**+2.9%**

Employees for economic activity – 2017

Economic activity	Employment 2017 (K)	% change 2017/2010
Agriculture	6	272.7%
Construction	5	-44.2%
Industrial activities	26	31.8%
Trade, hotels and restaurants	27	-25.7%
Other services activity	72	9.3%
Total	**136**	**2.5%**

Active firms

Economic activity	Active firms 2017	% change 2017/2010
Agriculture	2,589	-7.6%
Construction	3,952	-12.9%
Industrial	2,047	-8.7%

Legal form of firms

Legal form	Active firms 2017	% change 2017/2010
Individual firm	17,783	-4.1%
Partnership company	4,949	-8.9%

activities		
Market Services	17,575	2.2%
Non-Market Services	2,051	3.8%
Not classified	3	-40.0%
Total	**28,217**	**-1.9%**

Capital company	4,971	15.7%
Other legal form	514	2.6%
Total	**28,217**	**-1.9%**

Active firms in Provincia di Livorno for economic activity

Economic activity	Active firms 2017	%	% change 2017/2010
Agriculture, forestry and fishing	2,589	9.2%	-7.6%
Mining and quarrying	16	0.1%	-11.1%
Manufacturing	1,912	6.8%	-10.3%
Electricity, gas, steam and air conditioning supply	40	0.1%	166.7%
Water supply sewerage, waste management ...	79	0.3%	3.9%
Construction	3,952	14.0%	-12.9%
Wholesale and retail trade, ...	8,702	30.8%	-0.4%
Transportation and storage	1,140	4.0%	-6.3%
Accommodation and food service activities	3,182	11.3%	9.6%
Information and communication	557	2.0%	3.7%
Financial and insurance activities	657	2.3%	9.9%
Real estate activities	1,428	5.1%	-7.0%
Professional, scientific and technical activities	725	2.6%	5.5%
Administrative and support service activities	1,184	4.2%	19.2%
Public administration and defence, ...	0	0.0%	/
Education	159	0.6%	6.0%
Human health and social work activities	139	0.5%	28.7%
Arts, entertainment and recreation	449	1.6%	3.0%
Other service activities	1,303	4.6%	1.6%
Activities of households as employers, ...	1	0.0%	/
Not-classified firms	3	0.0%	-40.0%
Total	**28,217**	**100%**	**-1.9%**

3. Environment and Climate Change

Climate change in Tuscany (source: GreenReport by Luca Aterini)

The Paris Climate Agreement imposes to do anything to keep the global temperature rise within +1.5°C by 2100 but Piombino, with an increase of +1,7°C, is the number 25 between the 558 more overheated European cities. The European data journalism Network on climate change in Europe, with the scientific support of the European Centre for Medium-Range Weather Forecasts (Ecmwf), and data show that many European cities have already exceeded +2°C – the safety threshold. In this context, Tuscany is not looking so good. The investigation analysed data from 558 European cities, 54 of which Italian and 5 Tuscan. In each case – including regional ones – average annual temperatures are higher than those recorded in the 20th century.

As for the Tuscany, the cities concerned are Piombino, Grosseto, Massa, Livorno and Firenze. The last four have already suffered a temperature increased of +1,2°C while Piombino holds the record (+1,7°C). It is the highest temperature increase recorded in Italy, except for Belluno (+2°C). Despite Tuscany is by far one of the most receptive region to the issue of sustainable development.

The battle against climate change must be held on an international scale, considered the global character of the problem. At present, there are two main overall actions planned by Regione Toscana. The first one relates soil protection, that is under great stress by drought and water bombs. The second one, to be undertaken in cooperation with the University of Pisa, aims to achieve a carbon-free electrical energy production from renewable sources by 2050. Geothermal energy, which is the most characterising renewable source of Tuscany, will give the crucial support to reach the goal; nowadays, it satisfies the 30.7% of electrical energy Tuscan demand. There is still time to tackle climate change and the best example is taking place in front of our eyes: since 2011, Siena district is the very first European large area –and maybe in the world- to be certificated as “carbon free”, i.e. zero net emission.

Costa Toscana protected areas

Costa di Toscana's system of wilderness protection	
National parks[1] • Tuscan Archipelago National Park (the largest marine park in Europe and the fourth most visited in Italy: 3.483 million visitors in 2014) • Appennino Tosco-Emiliano National Park	*Regional parks*[2] • Maremma Nature Park • Migliorino, San Rossore and Massaciuccoli Nature Park (Secche della Meloria protected marine area) • Parco naturale regionale delle Alpi Apuane • Parco interprovinciale di Montioni • Parco provinciale dei Monti Livornesi
Other protected areas	
• 1 national protected natural area (Cetacean Sanctuary) • 19 state nature reserves[3] • 22 regional nature reserves	• 27 wildlife conservation areas of local relevance (ANPIL) • 4 wetland areas of international relevance[4] • 27 other wilderness areas (oasis, biotope, etc.)

Localities with high-quality tourism certificates and eco-labels

- **Bandiera Arancione:** label awarded by the Touring Club Italiano (TCI) to small inland municipalities (max 15 thousand inhabitants) known for a wide range of tourist services and a high-quality reception facilities. 14 Costa di Toscana's municipalities have been awarded the "Bandiera Arancione" out of a total of 227 awards throughout Italy.
- **Blue Flag (Bandiera Blu)**: is one of the world's recognised voluntary eco-label awards conferred each year by the FEE (Foundation for Environmental Education) to

1 The 25 italian national parks are terrestrial, marine, riverside or lake areas that incorporate one or more intact ecosystems (or partly altered by anthropogenic factors) and/or one or more physical, geological, geomorphologic, biological formations of national and international relevance with natural, scientific, cultural, aesthetic, educational or recreational value such that exceptional State's measures must be envisaged for their preservation.

2 Regional nature parks consist of terrestrial, marine, riverside or lake areas and, in some cases, of sea areas off the coast, with natural and environmental value, creating a homogenised system with harmonised natural features, rural and cultural value and local popular traditions.

3 Nature reserves consist of terrestrial, marine, riverside or lake areas that incorporate one or more relevant animal and floral species, or rather include one or more ecosystems important for the biological diversity or the conservation of genetic resources. Nature reserves could be national or regional.

4 Wetland areas of international relevance consist of swampy areas, marshes, peatlands or natural or artificial water areas, permanent or transient including saltwater areas with a depht of no more than six metres at low tide.

beaches, marinas and sustainable boating tourism operators in 49 countries in Europe and beyond. In order to qualify for the Blue Flag, a series of stringent environmental, educational, safety and accessibility criteria must be met and maintained. The "Blue Flag Beaches" is being awarded to coastal resorts meeting the quality criteria on bathing water and shores while the "Blue Flag Marinas" to marinas preserving the cleanliness of the waters without raw sewage. In 2018, 18 Tuscan beaches have been awarded the Blue Flag out of a total of 368 awards throughout Italy, while the marinas were 6 out of a total of 70.

Some of the objectives and policy lines of Costa di Toscana 2016 – 2020 strategic development plan are provided below (document annexed to the Regional Development Programme). They aim to promote a global and integrated approach to the upgrading and to the revival of the competitiveness of the area, towards a sustainable environmental, economic and social development model.

Overall objective 3 – Protecting environmental quality and wildlife and natural resources of Costa di Toscana through action mitigating the effect of human activities, measures on hydrogeological concerns and equilibrium of coastal zones and promotion of sustainable use of natural resources	
Specific objectives	**Policy lines**
3.1 Environmental rehabilitation of productive area action mitigating the effect of human activities	1) Environmental rehabilitation of production areas through action to reduce the pollution and to secure the aquifer and the soil
	2) Action mitigating the effect of human activities (gas emission and pollutants with a high environmental impact reduction). Support for organic farming
	3) Restoring forestry potential in forests damaged by natural disasters and prevention in wooded area
3.2 Measures on hydrogeological concerns to reduce the water-risk and to protect the equilibrium of coastal zones	1) Requalification of the hydraulic network, to restore and secure from hydrogeological instability
	2) Action on the dynamics of coastal equilibrium to protect and enhance the biodiversity and the marine and the marine environment, including the action against the coastal erosion
	3) Development of the agricultural sector as a factor of territorial protection and to prevent the land abandonment (i.e. Progetto Banca della Terra)
3.3 Measures on energy efficiency and promotion of renewable energies	1) Measures on public property energy efficiency (public facilities, public-lighting installations and district heating networks) and private assets (investments and incentives towards private buildings and energy consumption)
	2) Supporting the renewable energy deployment, with particular reference to the diversification of sources. European Geothermal District
3.4 Promotion of sustainable use of natural resources with a view to circular economy development	1) Protecting and preserving the water resource in terms of collection, storage and efficiency
	2) Measures to promote separate collection systems, to reduce the amount of waste generated from landfill and to support the consolidation of recovering and recycling procedures (circular economy)

4. Infrastructure and Mobility

Accessibility

Connection and accessibility of Costa di Toscana are ensured by different modes of transport.

"Pisa-G. Galilei Airport" is active in domestic, international and intercontinental flights. There are also two smaller airports, in Grosseto ("Corrado Baccarini") and Isola d'Elba (Marina di Campo), that contribute to increase the flights especially in the high season.

The "A12" is one of the most important motorway of the coastline. It could connect Genoa with Rome throughout the coast but it is still unfinished in the road section south of Tuscany and, therefore, it is replaced by the Variante Aurelia. The "A11 – Firenze-Mare" is the other motorway that provide access to the area, connecting Florence to the central and northern Tyrrhenian coast. Importante come volumi di traffico anche la The "SGC Firenze – Pisa – Livorno" is also significant in terms of traffic volume .

With regard to railways transport, the railway line, that is perpendicular to the coastline and connects Turin – Genoa – Rome, may be mentioned.

The Port of Livorno is the most important one to maritime links but it is also one of the major Italian and Mediterrean ports for both passenger and freight traffic. There are other ports that provide ferry services with the Archipelago and the other islands. Ferries for Isola del Giglio and Giannutri leave from Porto Santo Stefano; boats for Isola d'Elba, Corsica and Sardegna leave from Piombino while the ones for Corsica, Sardegna, Sicilia, Capraia e Gorgona leave from Livorno. Along the coast of Tuscany and the Archipelago there are many ports and marinas.

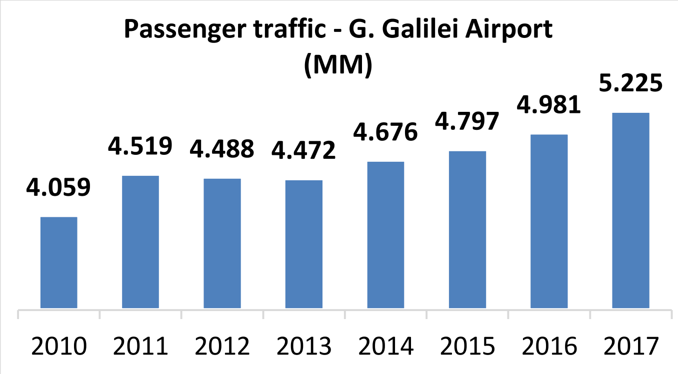
All major cities have developed their local transport system urban and extra urban. Furthermore, several areas are investing in urban and touristic cycle paths.

Passenger traffic at airports

Pisa-G. Galilei Airport

According to Assaeroporti data, in 2017 Pisa airport recorded more than 5 million passengers, standing at first place in Tuscany in terms of traffic volume (11th in Italy). 72.6% of passengers travelled on international flights (of these, around 9 out of 10 were links with European countries) and 24.4% on local flights.

From 2010 to 2017, the airport increased by +28.7% commercial traffic and by 1,166 million of passengers; both domestic and international traffic are rapidly growing. Forecasts indicate an additional growth, of both freight and passengers. Further development of interconnection with other transport systems is therefore important, not just material but above all of link communications services.



Passenger in commercial air transport	Passengers 2017	% change '17/'10
Domestic	1,429,543	+34.3%
International	3,792,743	+27.2%
In transit	2,283	-83.9%
Total	5,224,569	+28.7%

Source: Assaeroporti

Others Costa di Toscana's airport facilities:

- Grosseto civil airport is one of the main Italian military airport. Nevertheless, especially during the tourist season, serves both civil, private and charter flights. In 2017 it registers a little less than 8 thousand passengers, with a fall of 7.1% compared to 2010.
- Marina di Campo airport lies at the heart of Isola d'Elba and it is open to commercial traffic all year round. In 2017 recorded 9 thousand passengers, with a slight positive trend (+1.3%) compared to 2010.

Airport	Passengers 2017	% change 2017/2010
Grosseto Airport	7,774	-7.1%
Elba Airport	9,227	+1.3%

Source: Enac

Seaport network in Tuscany

Tuscan seaport network consists of ports of national interest such as Livorno, Piombino and Carrara, of other important regional realities such as Viareggio, Marina di Campo, Isola del Giglio and Porto Santo Stefano and recreational boating facilities through the docks and the marinas all along the coast.

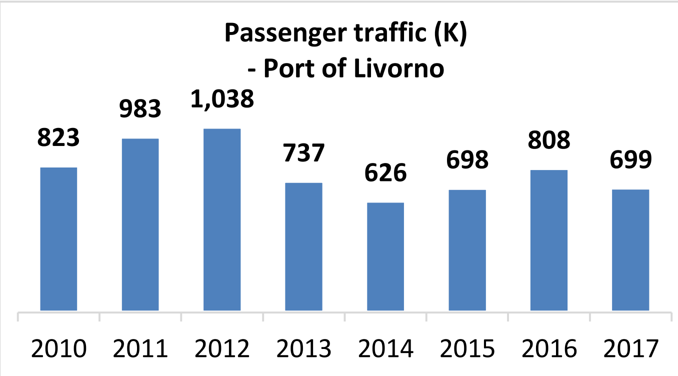
TOURIST PORT INFRASTRUCTURE - 58 facilities, of which: - 83% moorings - 5% docks - 12% ports - More than 23 thousand slip rentals	Main features: - Prevalence of ports with a marginal rate of slip rentals intended for transiting - Easy access for all kinds of boat and competitive prices - Inadequate infrastructure and, in some cases, insurmountable physical limits - Tuscan port localities intercept the flows of leisure boaters from the North-Western Mediterrean and Central

	Europe to Eastern and Southern Mediterrean - Maritime tourism transit on Tuscan coast is widely generated by the way to Tuscan Archipelago as final destination

Cruise passenger traffic

In 2017, cruise passengers traffic in Tuscany recorded a total of 754 thousand passengers (in total, 7 ports entered figure). Port of Livorno moved about 700 thousand passengers; it is the regional's most important facility and the 6th in Italy.

Compared to 2010, passenger traffic decreased by 11 percentage points (-15% in Port of Livorno) with a loss of approximately 124 thousand passengers.



	Passenger 2017	% change '17/'10
Port of Livorno	698,780	-15.0%
Total Tuscany's ports	753,791	-11.0%

Source: Risposte Turismo, Speciale Crociere

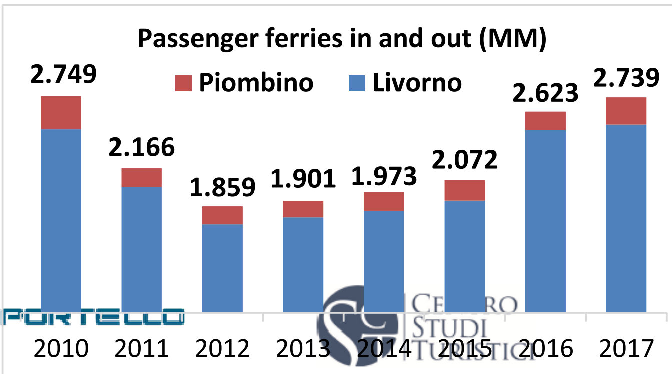
In a study by Irpet, "Il Crocierismo a Livorno e il suo impatto economico sulla Toscana, July 2018)

- 77% of cruise passengers land during the layover in Livorno, visiting:
  - Livorno (46%)
  - Pisa (33%)
  - Firenze (22%)
  - Lucca (5%)

In 2016, Livorno cruise industry generated an expenditure of around EUR 52 million, of which:
EUR 36.8 million by landed cruise passengers
EUR 26.7 million: the value added produced
EUR 31.6 million: the GDP generated in Tuscany

Cruise passengers

In 2017, there were more than 2.7 million cruise passengers in Tuscan ports. Around 2.5 million passed through the Port of Livorno and 221 thousand through the Port of Piombino; furthermore, about 6 thousand passengers passed



Source: Assoporti

through Portoferraio, Rio Marina and Cavo.

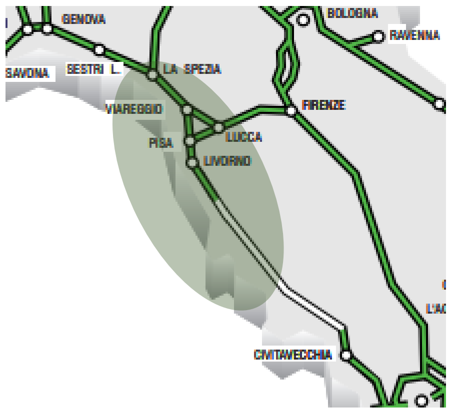
Compared to 2010, the total number of cruise passengers in Tuscany declined by 0.3% (-9 thousand units) with a positive balance of 1.5% for Livorno and a negative one for Piombino (-17.2%).

Transit users of A12 motorway

Finally, the following are data published by Aiscati on Costa di Toscana's motorway network traffic, namely light-duty and heavy-duty vehicles passed through A 12 Sestri Levante – Livorno, A12 Livorno – Civitavecchia e A11 Firenze – Pisa Nord, whatever the distance travelled.

Daily average effective vehicles	**2017**	**% change 2017/2010**
Sestri levante - Livorno	127,448	-7.7%
Light-duty vehicles	*106,458*	*-7.3%*
Heavy-duty vehicles	*20,990*	*-9.9%*
Livorno - Civitavecchia	38,809	98.0%
Light-duty vehicles	*32,856*	*104.8%*
Heavy-duty vehicles	*5,953*	*67.5%*
Firenze - Pisa Nord	185,793	4.7%
Light-duty vehicles	*158,095*	*5.0%*
Heavy-duty vehicles	*27,698*	*3.3%*

Source: Aiscat



5. Tourism and Leisure

Costa di Toscana's tourist system accounts for some 6.7 thousand tourist accommodations, 920 bathing establishments, 11 thousand businesses in the catering sector (i.e. restaurants, pizzerias, coffees), authorised tour guides, environmental tour guides, travel agencies, transport companies, amusement parks, etc.

Every year almost 5 million tourists visit the area, with around 22 million official nights spent. In addition, there are those staying in private houses or with friends and relatives, or in private houses and apartments not included in the list of the official tourist accommodations (according to Irpet, this is nevertheless a phenomenon that satisfied more than half of tourist demand in Tuscany in 2017).

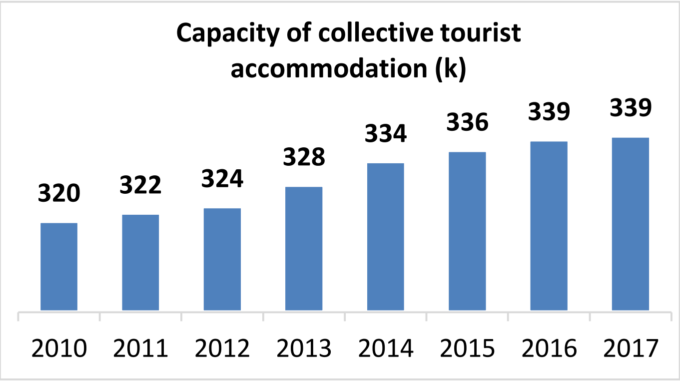
Supply of tourist accommodation

According to Regione Toscana official statistics relating to the year 2017, Costa di Toscana's tourism accommodation consists of 6,747 official tourist accommodations for a total of 339 thousand bed places (as 43% and 61% respectively).

It is a particularly dynamic sector, that in the last few years has seen the entry of new operators increasing the options available to travellers; since 2010, indeed, there was a constant strengthening of supply, increased by more than 1,200 tourist accommodation establishments (+22%) and 19 thousand bed places (+6%).

No. of establishments	6,747
Bed places	339,427
Bedrooms	120,046

Source: Regione Toscana



Supply of hotels and similar accommodation

Hotel facilities include 1,419 establishments for over 92 thousand bed places and 40 thousand bedrooms. 3 stars are the most widely used type of hotels both in terms of establishments and bed places but there are also several 1-2 stars and 4-5 stars hotels and hotel tourism residences; the latter make a significant contribution in terms of total capacity, thanks to a higher average capacity.

Some indicators of hotels and similar accommodation

- 21.1% of establishments and 27.3% of bed places of the whole area are hotel facilities
- 25.5% of hotel bed places are in 4-5 stars hotels, 25.2% in hotel tourism residences
- 2.8 stars is the bed places average rating (Tuscany 2.9 stars)
- 65.2 is the average of bed places per establishments (Tuscany 67.4)
- From 2010 to 2017: -1 establishment and +1,657 bed places
- 4-5 stars and hotel tourism residences increased, 3 stars remained stable while 1-2 stars decreased

Hotels	No.	Bed places
4 - 5 stars	189	23,625
3 stars	628	35,647
1 - 2 stars	360	10,000
Hotel tourism residences	242	23,293
Total	**1,419**	**92,565**

Supply of non-hotel accommodation

Non-hotel accommodation facilities consist of 5,328 establishments and around 247 thousand bed places. With more than 2 thousand establishments, farm holidays are the most popular ones, followed by room rentals, private houses e holiday homes. However, around two-third of bed places are in tourist campsites and holiday villages.

Some indicators of non-hotel accommodation

- 78.9% of establishments and 72.7% of bed places of the whole area are non-hotel facilities
- 41% of establishments are farm holidays
- 65.1% of hotel bed places are in tourist campsites and holiday villages
- From 2010 to 2017: +1,241 establishments and +17 thousand bed places
- The number of farm holidays, room rentals, private houses, holiday houses and historic buildings increased

Non-hotel accommodation	No.	Bed places
Farm holiday	2,181	30,904
Tourist campsites and holiday villages	192	160,682
Holiday dwelling (rented), B&B	2,815	42,883
Other accommodation n.e.c	140	12,393
Total	**5,328**	**246,862**

Focus on Livorno District					
Capacity of collective tourism accommodation establishments			**Capacity by type of accommodation**		
	Year 2017	**% change 2017/2010**		**2017**	**% change 2017/2010**
					Hotels
No. of Establishments	1,318	+16.7%	No. of Establishments	369	+0.8%
Bed places	119,060	+7.6%	Bed places	30,584	+5.5%
					Non-hotel accommodation
Bedrooms	36,995	+5.7%	No. of Establishments	949	+24.4%
			Bed places	88,476	+8.3%

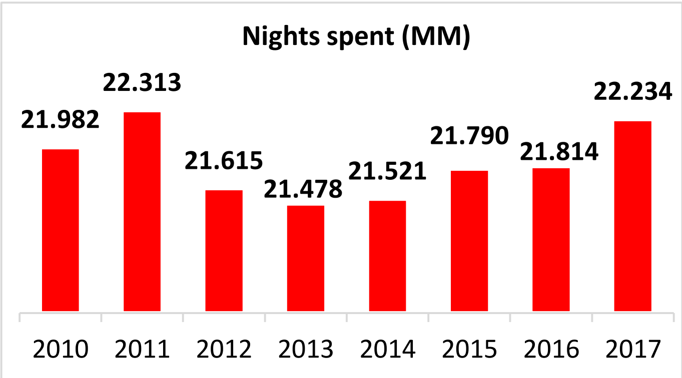
Tourism demand

In 2017, Costa di Toscana's official demand reached almost 5 million arrivals and 22.2 million nights spent (as 36.0% and 47.9% respectively of the total region's value). Average length of stay was 4.5 nights, 1 night more than Tuscany's one (3.4 nights).

Since 2010, tourism demand trend has not been uniform, alternating positive seasons (such as 2017) and negative ones. However, the overall balance is positive being at +15.4% for arrivals and +1.1% for nights spent; in absolute terms, there has been a growth by more than 660 thousand arrivals and 252 thousand nights spent. On the contrary, the average length of stay decreased from 5.1 to 4.5 nights.

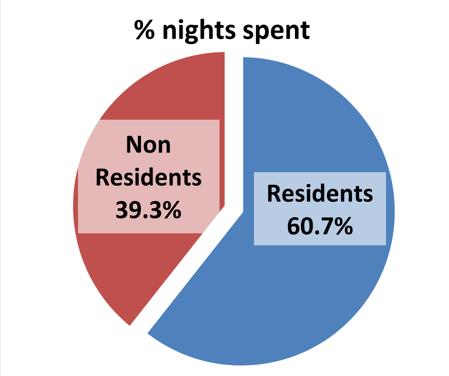
ARRIVALS	4,952,253
NIGHTS SPENT	22,234,239
AVERAGE LENGHT OF STAY	4.5 nights

Source: Regione Toscana



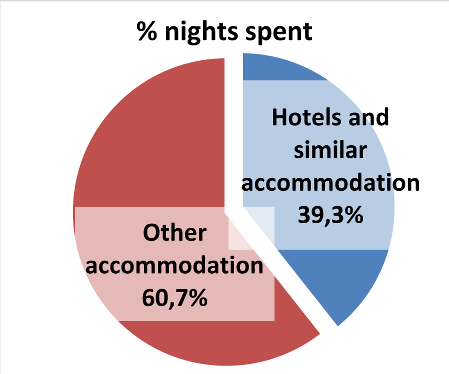
Coastal tourism differs from the regional one for a higher incidence of resident tourists; in 2017 there have been more than 3 million arrivals and around 13.5 million nights spent by resident tourists, compared to 1.9 million arrivals and 8.7 million nights spent by non-resident tourists (in Tuscany, nights spent by non-residents represented 54.3% of the total amount). The latter generated a slightly higher average length of stay, (i.e. 4.6 average nights than 4.4 of residents).

- The internationalisation rate of Costa di Toscana's official demand amounts to 39.3%, appreciably lower than Tuscany's one (54.3%)
- From 2010 to 2017: -6.6% of nights spent by residents (as -2.0% and 22.1% respectively of the total region's value)



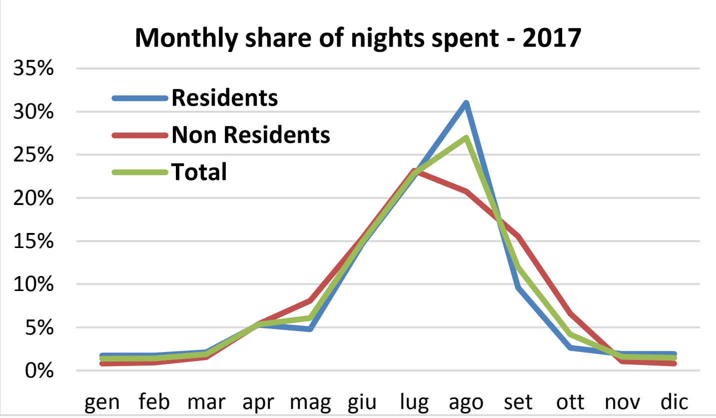
In addition, the distribution of nights spent between hotel and non-hotel accommodations is different from the regional one. The first ones collected almost 2.8 million tourists for a total of 8.7 million nights spent while the second one 2.2 million tourists for a total of 13.5 million nights spent (in Tuscany prevailed the nights spent in hotels and similar accommodations with 51.1% of the total amount). The average length of stay in non-hotel accommodations is definitely higher (6.2 nights) compared to the hotel's one (3.2 nights).

- The share of nights spent in Costa Toscana's non-hotel accommodations amounts to 60.7%, significantly higher than Tuscany's one (48.9%)
- From 2010 to 2017: -1.9% nights spent in hotels and similar accommodations, +3.2% the non-hotel ones (as 7.0% and 12.7% respectively of the total region's value)



The monthly distribution of touristic flows in Costa di Toscana highlights a rather steep seasonality during the hottest months of the year, from June to September, with different preferences between residents and non-resident: the first ones concentrate their visits in July and August while the second ones extend the period from May to October.

- 76.6% nights spent are between June and September
- The favourite months are August (for residents) and July (for non-residents)
- Residents concentrate their visits during the summer months
- Non-residents prefer May, September and October



Focus on Livorno District

Occupancy in collective tourist accommodation

	2017	% change 2017/2010
Arrivals	1,461,503	+21.0%
Nights spent	8,688,862	+7.1%
Average lengths of stay	5.9 nights	6.7 nights (2010)

Nights spent by country/world region of residence of guests and type of accommodation

	% nights spent	% change 2017/2010
Italy	5,189,750	-0.8%
Foreign countries	3,499,112	+21.3%
Hotels	2,854,949	-1.7%
Other accommodation	5,833,913	+12.0%

6. Existing policies related to ThreeT project features.

Regional policies for the enhancement of the eco-tourism potential of the coastal territories of Tuscany are divided into different areas of intervention. Below, in addition to the strategies and regional actions concerning transport, are also described those related to the enhancement of the potential eco-tourism of the coastal territories of Tuscany and to the policies of Tourism and the use of Structural Funds that affect the social and economic development of regional territories through the ROP ERDF.

1) ThreeT coherence with the Regional Tourism Policies

The Strategic Operational Document 'Destination Tuscany 2020'

It represents an instrument towards an effective systemic integration of strategic policies on tourism. Considered the objective complexity of the tourism sector, its participatory approach puts the emphasis on the needs of the territory and it intends to identify the most appropriate decisional policies, the most effective paths for sustainable tourism development and the enhancement of identities and assets.

This heterogeneity is particularly marked in the case of Tuscany. The territory, in view of the background cultural homogeneity, presents a variety of natural and human environments, a wealth of cultural and landscape attractions. The result is a vast number of potential reasons for visiting, with few competitors in other regions of the peninsula. We must necessarily speak of a plurality of sub-regional tourism systems and products, even if they fall within the large and powerful regional brand "Toscana". Based on four main analytical categories (the socio-economic context, the attractive elements of the territory, the stock and the evolution of the accommodation offer, the characteristics and dynamics of demand), there are three macro-categories of tourism products that identify different areas of the territory:

a) Tourism in urban areas, major art cities and spa towns;

b) Experiential tourism, active tourism and well-being in the hills and in the mountains;

c) Seaside tourism.

Attractiveness and competitiveness also depend on the ability to enhance existing elements, highlighting the differences, the peculiarities, the many small "Tuscanies" present in the Region. The new technologies also make it possible to bring the territory closer: the Tuscany Lifestyle to the first wishes and to the choices of every potential tourist. These flows are to be conveyed through digital eco-systems that deal with the offer, promotion and marketing, information and training, and support for destinations. The tailor-made tourist proposal passes through the one-to-one contact of the tourist that can take place effectively only through the digital portals and tools that increasingly constitute the dynamic expression and the meeting place for tourists of our time.

2) ThreeT coherence with the 2014-2020 ROP ERDF of the Tuscany Region

The Program is based on three strategic choices:

- the priority role of research, development, innovation and competitiveness of the economic system, with particular attention to the manufacturing dimension on the one hand and the link between tourism, cities and major museum attractors on the other;
- the synergy between greater business competitiveness and environmental sustainability, as a guide to development and production;
- enhancement of the social dimension for territorial interventions, which focus on services to people and the functional recovery of properties aimed at the inclusion of vulnerable groups.

Axis 1. To reinforce research, technological development and innovation

Axis 2. To improve access to information and communication technologies, as well as the commitment and quality of the same

Axis 3. To promote the competitiveness of SMEs

Axis 4. To support the transition to a low carbon economy in all sectors

Axis 5. To preserve and protect the environment and to promote the efficient use of resources

Axis 6. Urban

Axis 7. Technical assistance

The so structured ROP seems to be very "sectorial" in pursuing its strategies, since its axes focus on specific issues of the Regional Development Plan (RDP) and other policy instruments (for example the Regional Transport Plan and Mobility).

With reference to Threet, the Axis 5 aims at "preserving and protecting the environment and promoting the efficient use of resources". In particular, Action 6.7.1 provides for the enhancement of cultural heritage in the perspective of sustainable development through concerted interventions at various levels also in the field of tourism and sustainable mobility, with the aim of pursuing an integrated and more transversal approach. This approach proposes an innovative method of protection and enhancement of cultural and natural heritage, integrating the contribution of light mobility in the heritage policy and the promotion of sustainable tourism (Axis 4: Supporting the transition to a low carbon economy in all sectors). The policy thus integrated will improve the fruition of heritage, even in peripheral and island areas (difficult to connect) and mitigate the impact of seasonal tourism by promoting sustainable mobility and introducing the "experiential tourism" that enriches the journey and not just the destination.

The intervention of the ROP concentrates in the areas of the great museums and cultural attractions (most of which are located in the main cities of art), recognizing their central role played within the territory for the activation of new services and links with minor realities but with high development potential within 5 themes identified for this purpose. Among the 5 themes, those linked to the territory covered by the ThreeT Project are:

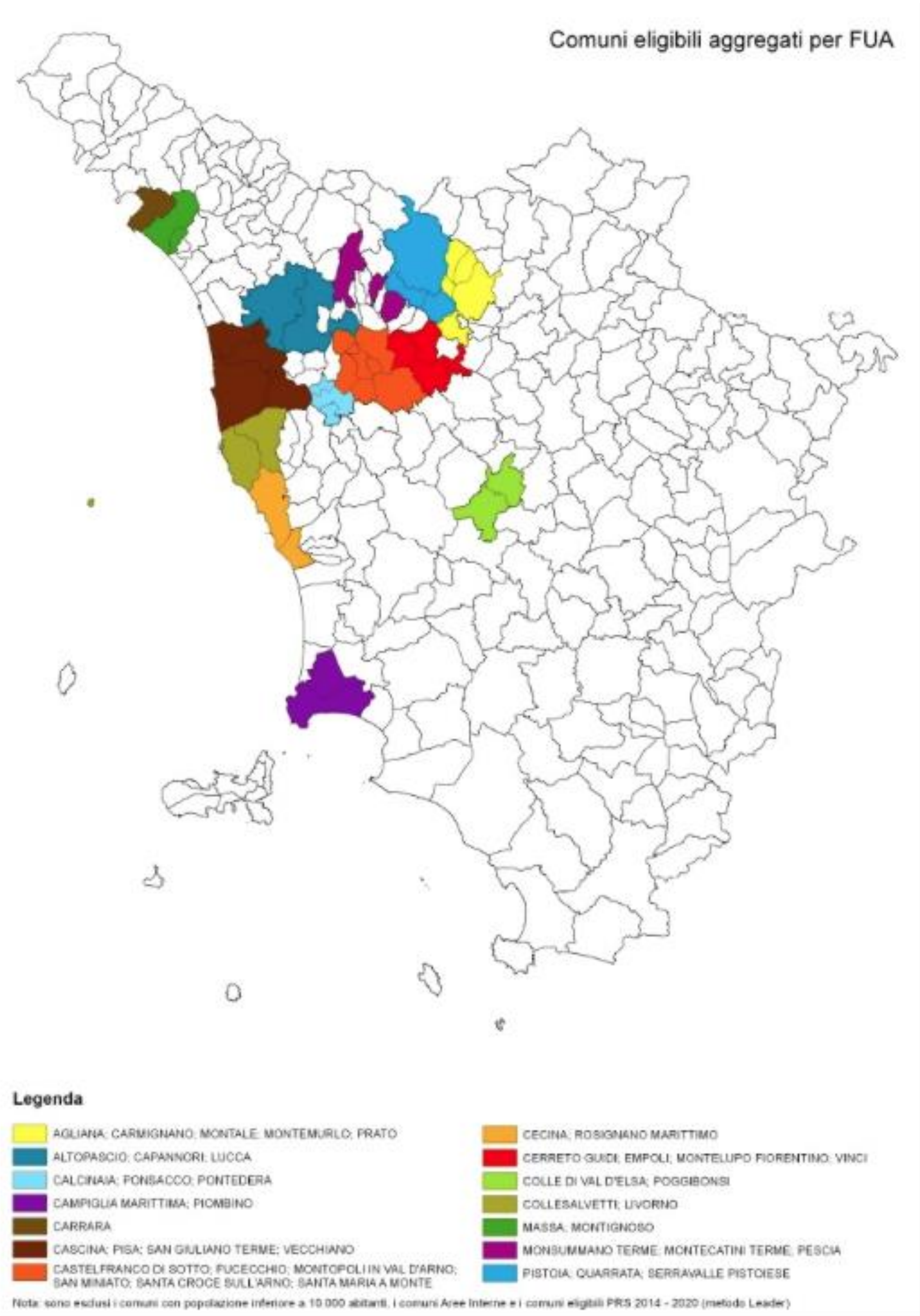
1 – The Etruscans in Tuscany: the ancient cities of Etruria. The aim of the interventions related to this theme is the increase in the number of visitors and the development of the attraction potential of the site / museum sites through the integrated enhancement between the museums, the archaeological areas and the territory of at least one of the main Etruscan centers of the Tuscany (the ancient cities of Etruria). 153 specific territories are identified with the presence of archaeological museums and archaeological areas or parks of particular relevance for visitor flows and tourist presences.

2 – The Middle Ages in Tuscany: the Via Francigena. Objective of the interventions concerning this theme is the enhancement of the historical / artistic heritage of the medieval period correlated with the Via Francigena, with particular reference to the ancient hospitals and reception facilities of the pilgrims of the city of Siena and their musealized heritage. Municipalities of Tuscany crossed by the Via Francigena with the presence of museums related by theme and with particular relevance for visitor flows and tourist presences are the Municipalities of Lucca, San Gimignano (SI), Monteriggioni (SI), Siena, Montalcino (SI).

3 – The Renaissance in Tuscany: Medici villas and gardens. The aim of the interventions concerning this theme is the increase in visits, the improvement of the offer and the development of a network of the Musealized Medici Villas, able to promote the knowledge and integrated use of the great Renaissance cultural heritage, with particular reference to lesser-known villas. The Municipalities in which are located the Medici villas and gardens recognized as World Heritage by UNESCO and registered in the regional information

system of the Museums (Cultural System - Database of the Region of Tuscany) are the Municipalities of Florence, Cerreto Guidi (FI), Vaglia (FI)), Seravezza (LU), Poggio a Caiano (PO).

Axis 5 is coordinated and integrated with Action 9.6.6 of Axis 6 - Urban, which attends on places of non-museum culture, with the aim of improving social wellbeing and promoting social inclusion. In particular, the Urban Innovation Projects (http://www.regione.toscana.it/porcreo-fesr-2014-2020/progetti-innovazione-urbana-asse-6#PIU) are integrated interventions aimed at promoting the social inclusion and the reduction of socio-economic discomfort, through the enhancement of the regional settlement structure and the implementation of architectural, technological and infrastructural interventions. On the basis of the analysis and territorial classification conducted by the Regional Institute for Economic Planning (Irpet), the Region has identified 14 functional urban areas (Fua), characterized by socio-economic discomfort conditions and environmental critical conditions higher than the regional average, and the territorial areas eligible for funding, on which to focus the interventions. The Fua falling within the territories involved in the ThreeT project are: Massa, Carrara, Livorno, Piombino, Cecina, Pontedera, Lucca, Pisa, Empoli (resolution of the Regional Council n.57 / 2015)


Comuni eligibili aggregati per FUA
Legenda
AGLIANA; CARMIGNANO; MONTALE; MONTEMURLO; PRATO
ALTOPASCIO; CAPANNORI; LUCCA
CALCINAIA; PONSACCO; PONTEDERA
CAMPIGLIA MARITTIMA; PIOMBINO
CARRARA
CASCINA; PISA; SAN GIULIANO TERME; VECCHIANO
CASTELFRANCO DI SOTTO; FUCECCHIO; MONTOPOLI IN VAL D'ARNO; SAN MINIATO; SANTA CROCE SULL'ARNO; SANTA MARIA A MONTE
CECINA; ROSIGNANO MARITTIMO
CERRETO GUIDI; EMPOLI; MONTELUPO FIORENTINO; VINCI
COLLE DI VAL D'ELSA; POGGIBONSI
COLLESALVETTI; LIVORNO
MASSA; MONTIGNOSO
MONSUMMANO TERME; MONTECATINI TERME; PESCIA
PISTOIA; QUARRATA; SERRAVALLE PISTOIESE
Nota: sono esclusi i comuni con popolazione inferiore a 10.000 abitanti, i comuni Aree Interne e i comuni eligibili PRS 2014 - 2020 (metodo Leader)

3) ThreeT coherence with the transport strategies in Tuscany

The regional law L.R. 55/2011 established the Integrated Regional Plan of Infrastructures and Mobility - PRIIM with the aim of: creating an integrated and qualified network of infrastructures and services for the sustainable mobility of people and goods; optimize the accessibility system for Tuscan cities, the territory and disadvantaged areas; develop the Tuscan logistics platform, as a condition of competitiveness of the regional system; reduce the external costs of transport, also by rebalancing and integrating transport modes; encouraging the use of public transport; better road safety conditions and the diffusion of information and communication technologies.

With reference to the coastal territories of Tuscany, the following interventions should be noted:

- Establishment of 2 National Port System Authorities in Tuscany, the Authority of Harbor System of the Northern Tyrrhenian Sea (including the sea ports of Livorno, seat of Authority, Piombino, Portoferraio, Riomarina, Capraia and Cavo) and the Authority of System Port of the Eastern Ligurian Sea (including La Spezia, seat of Authority, and Marina di Carrara). On the future of national ports, Tuscany has focused on important investments, starting from Darsena Europa in Livorno.

- The territorial continuity with the Tuscan Archipelago. The Tuscany Region, through the service contract with the Toremar shipping company, guarantees the maritime connection with the islands of the Tuscan Archipelago. As for the air service, to guarantee the safety and operation of the airport of Marina di Campo, within the framework of a specific agreement signed in October 2017 for the three-year period 2017-2019, the Region has allocated an annual contribution of € 570,000 in favor of Alatoscana, the company that manages the airport of the Island of Elba. The contribution allows both the normal airport traffic, and the flights of territorial continuity on the Elba-Pisa, Elba-Firenze and Elba-Milan Linate routes, active since 2014.

- Tyrrhenian corridor. Among the major highway works, the Region is committed to promoting the completion of the Tyrrhenian Corridor, foreseen by trans-European transport networks and as an integral part of the A12 highway.

- Minor railways. The activities carried out in the framework of the multi-year project, launched in 2014, continue to valorise the minor railways operating in the region, characterized by low attendance outside the commuters, but located in territorial contexts of high historical, cultural value, environmental and landscape, and therefore with considerable potential also in terms of attractiveness. The regional objective is to increase the users both for the ordinary service and for tourism, cultural and social purposes. Actions to promote the smaller railways are planned within the TRENO Project, financed within the Italy-France Maritime Program 2014-2020; the project intends to enhance the historical and secondary railways and make the natural and cultural heritage more accessibile.

- Integrated bike-train use. The project "By bike with the train", carried out by the Region in collaboration with Trenitalia to encourage intermodality between the bicycle and the train as a mode of transport with low environmental impact, concluded: in particular, following a regional calls, 356 bonuses were allocated for the purchase of folding bikes that can be transported by train (over 400 applications submitted), for an amount of 50,000 euros. Two separate initiatives have been carried out: a bike bonus to commuters for the purchase of a folding bike transportable by train and two discounted bike cards for train users traveling with the bike. Towards the promotion of train-bike intermodality, there is also the renewal program of the railway rolling stock supported by the Region, described above, which envisages and provides for the purchase of new trains equipped for the transport of bicycles.

4) ThreeT coherence with Cycle Mobility in Tuscany

Within the framework of the PRIIM policies and in accordance with the provisions of Regional Law 27/2012 on cycling, the Region is pursuing a series of measures to promote cycling mobility as sustainable transport alternative to polluting motorized vehicles. On the one hand, the Region promotes the implementation of cycling infrastructures and on the other encourages the use of bicycles (as low environmental impact mobility) through a series of interventions to support infrastructural policies such as promotion, training and communication. With regard to the implementation of cycling infrastructures, resources are provided for both urban interventions and for regional itineraries.

With regard to the coastal strip to which the Threet Project refers, we note:

- Interventions in urban areas continue the works financed with the call for tenders in 2014 aimed at the increase and networking of cycle paths, their safety, the creation of dedicated rest areas and interventions of livability and urban quality. There are 6 projects, among which those concerning the coastline related to the Municipalities of Lucca, Pisa, Orbetello and the Union of Municipalities of Versilia. In June 2016, the works and their monitoring started: to date, there are 4 interventions in progress, 1 in planning, while 2 interventions have been completed. There are also interventions in Rosignano, municipality of Pisa and the Province of Livorno. The project of the Municipality of Pisa is entirely dedicated to cycle mobility and is aimed at completing the east-west route corresponding to the Arno cycle path; the project presented by the

Province of Livorno contains cycling interventions located in the municipalities of Rosignano and Cecina.

- The Project of the Arno Cyclopean Integrated System – Sentiero della Bonifica (Path of Reclamation) aims to create a new cycle path along the Arno River, from the source on Mount Falterona to the mouth of Marina di Pisa, integrated with the Path of Reclamation, and connected to the Aretine and Sienese territory through the Canale Maestro della Chiana. The route crosses the entire Florentine metropolitan area, parallel to the Arno River. The work, which will be over 400 km long, crosses a large part of the Tuscan territory involving 57 municipalities, the Union of Municipalities of Casentino, the Metropolitan City of Florence, the provinces of Arezzo, Siena and Pisa, the National Park of Casentino Forests and the Regional Park of Migliarino and San Rossore. At the moment, around 46% of the itinerary has been completed or is under construction and the rest of the 54% has been started by local authorities, according to the Agreement on the implementation of the Arno Ciclopista integrated system – Sentiero della Bonifica of June 2015 and subsequent integrative acts.
- The Tyrrhenian Cyclopean: the Region is carrying out the European project INTENSE - Sustainable Tourist Routes, as part of the "Interreg V-A Italy-France Maritime Program" in collaboration with the Regions of Liguria, Sardinia, Corsica and the southern regions of France. The project, presented in Livorno in May 2017, provides for a loan of about 1 million for the Tuscany Region, and aims to create a coastal tourist cycle route and hiking trails that enhance and network the natural and cultural heritage of the cross-border area, increasing accessibility. On the basis of the pre-feasibility study prepared in 2015, the overall length of the cycle route is about 560 km. About 110 km are existing or to be adapted and 20 km to be achieved by 2020. Once concluded, the route of the Tyrrhenian Ciclopista will follow the entire coast of Tuscany (from the border with Liguria to the one with Lazio), through an itinerary that will cross 5 provinces (Massa Carrara, Lucca, Pisa, Livorno and Grosseto), will involve 30 Municipalities, 2 Regional Parks, and will connect with 12 touristic ports. To allow the construction of the Tirrenica Ciclovia, which starts from Ventimiglia, in Liguria, and arrives in Lazio through Tuscany, on the 7th April 2017, the Tuscany Region has signed a memorandum of understanding with the Liguria Region and the Lazio Region in order to be usefully interconnected with other routes of national and European interest, creating the conditions to access the funding provided by the Government for the national cycle routes.
- The cycling route of the Francigena, integrated with the hiking trail, is included within the system of regional cycling routes identified by the PRIIM and is implemented and promoted by the Directorate for Productive Activities. The Tuscany Region, on the basis of the official route of the Via Francigena, wanted to define and organize a cycling route along the Via Francigena. This route was created as a different tourist offer, oriented to the Pilgrim who wants to visit the Via by bike: therefore the route of the Francigena

Cycle is integrated with the pedestrian route of the Way, following the steps defined by the official route. The route and its characteristics are studied according to the parameters identified by the EuroVelo Route no. 5 project and it bears the Latin name Via Romea Francigena, from London to Rome and Brindisi, for a total length of 3,900 km. The Bicitalia route 3, which essentially resumes the European itinerary no. 5, coincides for many sections with the route of the Via Francigena from the Cisa Pass to Acquapendente for a length of about 400 km, in Tuscany. The Italian Federation of Friends of the Bicycle (FIAB) has collaborated in the formulation of a first itinerary, and it followed a revision of the route by the competent regional sector shared with all the municipalities crossed. The entire route does not have the technical and geometrical characteristics of a true cycle path, it is a 'possible recommended cycling route'. It was identified by assembling sections of existing cycle paths with various road sections, considered cyclable: mostly secondary roads, with low volume of vehicular traffic and different characteristics: from the extra-urban road, to the dirt track (white road), from the «carrareccie agricole», to the path in the woods. Therefore, there are no homogeneous characteristics for the background, nor for the delimitation of the 'cycle space'. Along the path of the Francigena cycle path, directional signage in both directions is currently underway, as well as some interventions aimed at the safety of the cyclist, financed in 2017 by the Production Activities Directorate. The proposed route is susceptible of improvement variants aimed at the insertion in the national system of tourist cycle tracks, and the increase in the safety of cyclists. In particular, the infrastructural aspects are relevant where the route crosses or intersects higher-level traffic, object of vehicular traffic.

5) Coherence of ThreeT with other EU projects concerning sustainable mobility

Project Name	EU Programme	Tuscany Region Role	Total eligible costs	EU Contribution	Implementation status	Subject
SIMPLA Sustainable integrated Multisector Planning	Horizon 2020	Partner	1.499.197,50	55.400,00	In progress	Intervention model aimed at integrating the two main integrated planning models (PAES and PUMS) promoted by the EC
NEREiDE Noise Efficiently Reduce by recycledD pavEment	LIFE	Partner	1.864.666,00	255.081,00	In progress	The project aims to bring acoustic benefits to the population through flooring composed of rubber dust from low-noise exhaust tires, whose mix design was developed by the University of Pisa, the project leader.
INTENSE Sustainable Tourist Routes in the cross-border area	PC Interreg Italia - Francia "Marittimo" 2014 -2020	Project leader	5.100.000,00	852.550,00	In progress	Strategic Project to improve accessibility, sustainable mobility and cycling and promote intermodality and sustainable tourism.

Project Name	EU Programme	Tuscany Region Role	Total eligible costs	EU Contribution	Implementation status	Subject
MOBIMART Smart Sea-Land Mobility	PC Interreg Italia - Francia "Marittimo" 2014 -2020	Project leader	6.098.150,13	1.138.119,63	Started on Aprile 14th 2018	Strategic Project on Infomobility, with the participation of 11 partners from all 5 regions of the cooperation area.
TRENO Promotion of tourist railway lines and historic trains	PC Interreg Italia - Francia "Marittimo" 2014 -2020	Partner	1.079.127,20	85.000,00	In progress	Development of sustainable and aware tourism through the implementation and networking of cultural-naturalistic and hiking itineraries through sustainable transport. Valorisation of historic and secondary railways.

The overall route of the Tyrrhenian Cycle Route in Tuscany is about 560 kilometers, including multimodal connections with railway stations and ports, including Piombino which allows to include the Island of Elba in the Cycle Route. It touches archaeological sites of interest (eg the Etruscan one of Populonia), characteristic villages, Versilia, the Etruscan Coast and cities of art such as Pisa. In addition it comprises several protected natural areas, including the Tuscan Archipelago National Park, the Regional Park of Migliarino, San Rossore and Massaciuccoli and that of the Maremma.
INTENSE Strategic Project (led by the Tuscany Region and financed under the PC Interreg Italy - France "Maritime") will allow the connection of the Tyrrhenian Cycle Route both with the cycle route system of Sardinia and Corsica and with the cycle route of the Côte d'Azur and the Maritime Alps.

7. Stakeholders

The key stakeholders of the project, with regard to the area of the Tuscan coast (with particular reference to the territories affected by the route of the Tyrrhenian cycle path) have been identified starting from the following list:

- Municipalities
- Provinces
- Chamber of Commerce
- Trade associations
- TPL companies
- Universities and research centers

• Foundations and cultural institutions
• Parks

Municipalities of the Tuscan coast

The municipalities directly affected by the route are 30, to which are added the 7 municipalities of Elba connected thanks to multimodal connections with ports

1. **Carrara**
2. **Massa**
3. **Montignoso**
4. **Forte dei Marmi**
5. **Pietrasanta**
6. **Camaiore**
7. **Viareggio**
8. **Seravezza**
9. **Massarosa**
10. **Vecchiano**
11. **San Giuliano Terme**
12. **Pisa**
13. **Livorno**
14. **Collesalvetti**
15. **Rosignano Marittimo**
16. **Cecina**
17. **Bibbona**
18. **Castagneto Carducci**
19. **San Vincenzo**
20. **Piombino**
21. **Campiglia Marittima**
22. **Follonica**
23. **Scarlino**
24. **Gavorrano**
25. **Castiglione della Pescaia**
26. **Grosseto**
27. **Magliano in Toscana**
28. **Orbetello**
29. **Monte Argentario**
30. **Capalbio**

Municipalities of Elba:

31. **Campo nell'Elba**
32. **Capoliveri**
33. **Marciana**
34. **Marciana Marina**
35. **Porto Azzurro**
36. **Portoferraio**
37. **Rio**

ANCI Tuscany

Anci Toscana represents the system of the Tuscan Municipalities, of the Metropolitan City of Florence, of the unions of municipalities

<u>Provinces</u>

There are 5 provinces directly involved in the route

- **Province of Massa Carrara**

The province of Massa-Carrara is an Italian province of Tuscany of 195,254 inhabitants and 17 municipalities. The capital is the city of Massa. It is the tenth and last Tuscan province by number of inhabitants, and is in eighth place among the ten Tuscan provinces for the area.
It is the northernmost of the region, bordered to the west by Liguria (province of La Spezia), to the north by Emilia-Romagna (province of Parma and province of Reggio Emilia), to the south-east with the province of Lucca and overlooks on the Ligurian Sea to the southwest

- **Province of Lucca**

The province of Lucca is an Italian province of Tuscany of 389.473 inhabitants and 33 municipalities. It is the third Tuscan province by population and is the sixth Tuscan province by surface. It borders to the west with the Ligurian Sea, to the northwest with the province of Massa and Carrara, to the north with the Emilia-Romagna (provinces of Reggio Emilia and Modena), to the east with the provinces of Pistoia and Florence, to the south with the province of Pisa

- **Province of Pisa**

The province of Pisa is an Italian province of Tuscany of 420 585 inhabitants and 37 municipalities. It is the second Tuscan province in terms of population, and as far as the surface is concerned, with its 2 444 km² it is in fifth place among the ten Tuscan provinces.

It borders to the north with the province of Lucca, to the east with the metropolitan city of Florence and the province of Siena, to the south with the province of Grosseto, to the west with the province of Livorno and the Ligurian Sea.

- **Province of Livorno**

The province of Livorno is an Italian province of Tuscany of 335 658 inhabitants. It is the fifth Tuscan province by number of inhabitants, and the seventh by surface among the ten Tuscan provinces.
Facing west on the Ligurian Sea and the Tyrrhenian Sea (on the promontory of Piombino is the border between these two seas), it borders to the north and east with the province of Pisa, to the south with the province of Grosseto.

- **Province of Grosseto**

The province of Grosseto is an Italian province of Tuscany with 221 841 inhabitants and 28 municipalities.
The province occupies the southern end of Tuscany entirely and, by territorial extension with its 4 503.12 km², appears to be the largest in the region. It is one of the Italian provinces with the lowest population density.
It is the ninth and penultimate Tuscan province for the number of inhabitants, and the first Tuscan province by surface.
It borders the province of Livorno, with the province of Pisa, with the province of Siena and with the province of Viterbo (Lazio).
Bathed to the west by the Tyrrhenian Sea, it also includes the southern islands of the Tuscan Archipelago: the Island of Giglio, Giannutri and minor inhabited islands.

UPI Toscana

The Union of the Provinces of Tuscany (UPI TOSCANA) is the Association representing all the Provinces of Tuscany.

<u>Chambers of Commerce</u>

The Chamber of Commerce, Industry, Handicraft and Agriculture is a public body that performs functions of general interest for the business system, taking care of the development of local economies.
It is an autonomous body because each Chamber of Commerce has its own statute, defines its own political program and is, finally, independent of the financial and management side.

The functions performed by the Chamber of Commerce can be divided into the following activities:

- administrative activities: keeping lists, in which the main events that characterize the life of each company are recorded and certified;
- promotional activities: support for businesses and the development of the local economy;
- monitoring, study and analysis of data on the local economy: providing information necessary for a better knowledge of the socio-economic reality by companies and companies;
- market regulation activities: promoting and increasing the transparency, certainty and fairness of economic relations between companies and between businesses and citizens.

The Italian Chambers of Commerce give life to the chamber system, characterized by a "network" structure which, among other things, makes available in real time the data of each Chamber throughout the national territory.

Camera di Commercio Maremma e Tirreno

The Chamber of Commerce of the Maremma and the Tyrrhenian brings together the territorial districts of Grosseto and Livorno. It represents over 76,000 companies, operating on a territory that extends for 5,716 sq km, includes 48 municipalities and 565,569 inhabitants. Its strengths are the economy of the sea (with a port system that includes the ports of Livorno, Piombino and Portoferraio, the two ports of regional interest of Campo nell'Elba and Porto Santo Stefano, in addition to just under 90% of port facilities for tourism in the Tuscany region), a strong tourist vocation, qualified agricultural productions and in particular the wine production, the propensity for cross-border dialogue.
The Chamber of Commerce of the Maremma and the Tyrrhenian Sea has its main office in Livorno and secondary headquarters in Grosseto.

Camera di Commercio di Lucca

The Chamber of Commerce of Lucca, one of the oldest in the world, is a real service system for business development and employment that, thanks to a thorough knowledge of the various problems, works alongside companies with organizational tools advanced and with a willingness that derives from being a public body whose purpose is the promotion and development of the economy. In addition to being a center of distribution of certificates-visure and information on legal obligations, it is above all a structure specialized in assisting companies and promoting initiatives that increase the economic level of the province, thanks also to the relationship of bodies, associations, credit institutions, university structures, service centers and socio-economic organizations. The Chamber of Commerce system of Lucca carries out its action through a complex organizational network, divided into:

- an internal office structure through which services are provided to businesses and the functioning of the administrative machine is ensured;
- a series of investee companies, both consortiums and non-subsidiaries, that are functional to the realization of the chamber's action in the territory;
- participation in some foundations whose institutional activity intersects with that of the Chamber of Commerce;
- a series of associations for the development of the system and the territory;
- some memorandums of understanding signed in the context of sharing strategic territorial objectives with other stakeholders.

It has its headquarters in Lucca and branches in Viareggio and Castelnuovo di Garfagnana.

Camera di Commercio di Pisa

The Chamber of Commerce of Pisa, established October 16, 1862 by Royal Decree n. 929, is a Public Institution that performs functions of general interest for the business system within the province, taking care of the development of local economies.
It has its main office in Pisa and a branch in Santa Croce sull'Arno.

Camera di Commercio di Massa Carrara

The Chamber of Commerce of Massa-Carrara is a public body that carries out tasks of interest for the entire system of companies in the province of Massa-Carrara. It performs functions in administrative and economic matters related to the business system as well as functions of support and promotion of the general interests of the companies themselves, with the aim of offering:

- transparency of economic operators, through the business register;
- competence and reliability of many categories of economic operators, through the management and maintenance of a series of registers, roles and lists;
- fairness and financial reliability of commercial operators, through the computerized register of protests;
- support for the development of infrastructures of general interest, through company shareholdings;
- measures to regulate the market, through the protection of industrial property, the activities of the metric service, conciliation and arbitration, consumer protection, advice on commercial contracts, etc;
- training and promotional activities for the local economy;
- support for the culture of innovation and socially responsible business;
- actions to enhance the resources of the territory.

Head office in Carrara and secondary office in Aulla.

Trade associations

Confcommercio Toscana

Confcommercio Toscana, regional level of the Confcommercio-Imprese national confederation for Italy, represents over 40 thousand entrepreneurs and professionals in the tertiary sector in Tuscany.

It represents and protects the interests of the medium, small and micro enterprises in Tuscany towards the Region and other public and private bodies, through the dialogue with the political, social, economic and trade union forces and the active contribution to the programming of regional policies for the trade, tourism and services.

It includes the numerous federations of category expressions of the individual sectors and the eight Tuscan Provincial Associations of commerce, tourism and services belonging to Confcommercio-Imprese for Italy, of which it coordinates and supports the trade union activity, in full respect of the their local identities.

It promotes the dissemination of best practices and the exchange of ideas, and plays an important role in connecting with the other parts of the system and with the confederal organizations. It also offers a full range of assistance and specialist advice in various areas of activity, to promote the development and innovation of the tertiary sector in Tuscany. Finally, it promotes various initiatives aimed at the growth of the Tuscan economic system.

In the Confcommercio - Imprese per l'Italia Toscana system there are also regional training, technical assistance and credit companies: Mentore Scarl and Centro Fidi Terziario.

It is based in Florence.

The territorial system of Confcommercio Toscana is made up of the eight Provincial Associations of Arezzo, Florence, Grosseto, Lucca-Massa Carrara, Pisa-Livorno, Pistoia-Prato and Siena.

Confesercenti Toscana

Confesercenti is one of the main systems of representation of SMEs, entrepreneurs and self-employed workers in Italy and is a reference association in the tertiary and tourism sectors. Sign the national collective labor contracts for the Tertiary sector, Tourism and bakery. Founded in 1971, it is one of the leading Italian business associations and employs more than 5,000 employees and has a widespread presence throughout the country, featuring more than 1,000 local offices, which promote and support the activities of over 70 entrepreneurial categories that they belong to the association. The Confesercenti system is divided into territorial organizations, national trade federations, sectoral and thematic organizations, system companies, reference bodies.

In Tuscany, Confesercenti represents 35,000 companies and is present in the territory with 1 regional headquarters, 10 provincial offices and 1 mandate, 79 local and / or municipal offices, 18 permanent locations, for a total of 109 branches, of which 29 are owned. The

Association employs approximately 830 employees (and 150 collaborators), of which 80 in the regional system and 750 in the territory.

AIGAE

AIGAE, the Italian Association of Environmental Excursion Guides, was founded in 1992. Today it has over 3000 members throughout Italy and more than 100 associated companies.

At AIGAE refer both the Environmental Excursion Guides (which deal with Ecotourism) and the Environmental Education operators (who work as freelancers or in the major Italian companies engaged in the promotion of sustainable tourism and environmental education).

But the Association is above all a strong representation among all the institutional interlocutors: state, regional, provincial, parks, reserves, protected areas. It relates to and compares itself with the other categories of the world of tourism and the environment: it is certainly an important reference in Italy for those involved in environmental education and ecotourism. AIGAE is also a member of the National Green Tourism Observatory, of the COLAP (Coordination of Free Professional Associations), of Federparchi, of Interpet Europe, and is a partner of numerous protected areas.

It has a national headquarters in Taglio di Po (RO) and 20 regional coordinations.

AGAE

The European Environmental Guides Association has as its mission:

- represent and protect its members and contribute to the development of the professional activities of the Guide;
- bring together all the following professionals to work in synergy comparing the common problems: hiking, equestrian and underwater guides, park guides, tourist guides, alpine guides and ski instructors;
- promote and enhance the activities related to the above professional figures with particular attention to the Tuscan territory;
- contributing to the protection and enhancement of the territory by raising awareness of issues related to environmental and cultural heritage;
- contribute to the cultural growth of associates;
- make proposals to public and private bodies useful for the aforementioned purposes;
- collaborate with all those working for the tourism and environmental sectors, such as companies, associations, public and private bodies, parks and protected areas, museums, mass media;
- Promoting public bodies to organize professional training courses relevant to the activities covered by the association;
- organize training and updating courses;
- organize any other initiative useful for strengthening the Association and achieving its professional, scientific and cultural goals.

It is based in Florence.

Local public transport companies

CTT Nord

CTT is today a group that includes about 1433 workers, 900 buses and that carries out its activity in the territories of Livorno, Pisa, Lucca and Massa-Carrara. CTT is one of the few examples of successful private public partnership at national level, made exclusively by local Tuscan entities, historically rooted in the territory. Its members are about 80 municipalities in the provinces of Pisa, Livorno and Lucca and the Cooperativa Autotrasporti Pratese CAP of Prato as a private partner.

Tiemme Spa - Toscana Mobilità

Formally born July 22, 2010, from August 1 of the same year carries out the services of Tpl in the provinces of Arezzo, Grosseto and Siena and in the district of Piombino, Val di Cornia, in the province of Livorno by virtue of the aggregation of parent companies (Piombino, Arezzo, Grosseto and Siena)

From 1 January 2018 Tiemme is part of a single entity set up specifically for the management of TPL services within the Tuscany Region as part of the signature of the "bridge" contract that will be valid until 31 December 2019.

ATNC di Capraia isola

The A.T.N.C. is the concessionaire of the local public transport service in the municipality of Capraia Isola

Universities and research centers

University of Pisa

The University of Pisa was founded on September 3, 1343

It is structured in 20 departments, several of which deal with research activities in fields of interest for the project.

For example, the Department of Energy, Systems, Territory and Construction Engineering (D.E.S.Te.C.)

CNR Ibimet

IBIMET in the offices of FLORENCE, BOLOGNA, SASSARI and ROME, works in the definition of strategies and in the development of technologies and operational solutions that contribute to the resilience and sustainability of territorial and productive systems with respect to global emergencies affecting agro-food and no-food resources, climate and meteorology. It deals, among the various fields of intervention, with sustainable tourism

Foundations and cultural institutions

Museo di Storia naturale del Mediterraneo

The Museum of Natural History of the Mediterranean can be defined as:

- a research center able to provide useful addresses for the development of programs for the protection and conservation of natural heritage;
- a center of scientific culture aimed at the formation of a naturalistic consciousness;
- a cultural structure open to the spontaneous activity and activity of "Study Groups";
- a center of cultural aggregation for the community;
- a center of educational activity for schools.

It is based in Livorno.

Promo PA Fondazione

PROMO P.A. was founded in 2003 as a research foundation oriented to operate mainly in the field of training and cultural heritage, associated with the European Foundation Center (EFC) in Brussels and the Groupe européen d'administration publique (GEAP).

The declared objective is to support the process of modernizing the country, with particular regard - but not only - to the Public Administration.

The choice of cultural heritage as a further and fundamental field of action derives from the awareness that cultural heritage constitutes a strategic asset for the country and, as such, must not only be duly protected but also disseminated and valued. In this field are intertwined technologies, innovation, economic development, tourism, new models of public private governance for the enhancement. Also here training, research, definition of new models. An endless field of investigation.

Lastly, the Foundation carries out technical assistance projects, the result of research activities and those in the field, which make it possible to select and replicate management practices that are based on the success achieved in the concrete application.

It is based in Lucca.

Parks

Parco nazionale dell’arcipelago toscano

The National Park of the Tuscan Archipelago is considered the largest marine park in the Mediterranean because it includes seven islands, numerous islets and reefs that emerge in a

large stretch of the Tyrrhenian Sea in the heart of the great Sanctuary of the Cetaceans, Pelagos, institute as an international marine area protected in 1999.
The territory included in the perimeter of the protected area includes about 50% of the island of Elba and 40% of the island of Giglio, 80% of the island of Capraia and 100% of the smaller islands. 11 Municipalities are included. On Elba: Portoferraio (which also includes Montecristo), Porto Azzurro, Capoliveri, Campo nell'Elba (to which Pianosa belongs), Marciana, Marciana Marina, Rio Elba and Rio Marina. The Municipality of Capraia and the Municipality of Giglio (also for Giannutri) and Livorno (for Gorgona) and 2 provinces: Livorno and Grosseto (only for Giglio and Giannutri) since there are no coastal areas.
The entire Tuscan Archipelago, which includes the perimeter of the Park, occupies a total area of about 300 Km2 and has a coastal development of about 250 km.

Parco di Migliarino, San Rossore, Massaciuccoli
The natural park of Migliarino, San Rossore, Massaciuccoli is a protected natural area established with the Tuscan Regional Law n. 61 of 13 December 1979. The territory of the park extends over the coastal strip of the provinces of Pisa and Lucca, including the towns of Pisa, Viareggio, San Giuliano Terme, Vecchiano, Massarosa and Livorno. It also includes Lake Massaciuccoli, the mouths of the Serchio, Arno and Fiume Morto rivers, the former presidential estate of San Rossore, the forests of Tombolo, Migliarino and Macchia Lucchese, and manages the Secche della Meloria protected marine area.

Parchi della Val di Cornia
The Parks of Val di Cornia are a group of parks located in the provinces of Grosseto and Livorno:

- Archaeological Park of Baratti and Populonia and Archaeological Museum of the territory of Populonia (on the northern side of the promontory of Piombino and Gulf of Baratti): Etruscan city of Populonia;
- Protected natural area of local interest Archaeological Mining Park of San Silvestro and training and documentation center of Villa Lanzi: Temperino mine and medieval castle of Rocca San Silvestro;
- Coastal park of the Sterpaia (southern coast of the promontory of Piombino on the Gulf of Follonica);
- Rimigliano coastal natural park (Tyrrhenian coast north of the Baratti gulf)
- Natural Park of Montioni
- Poggio Neri forest park

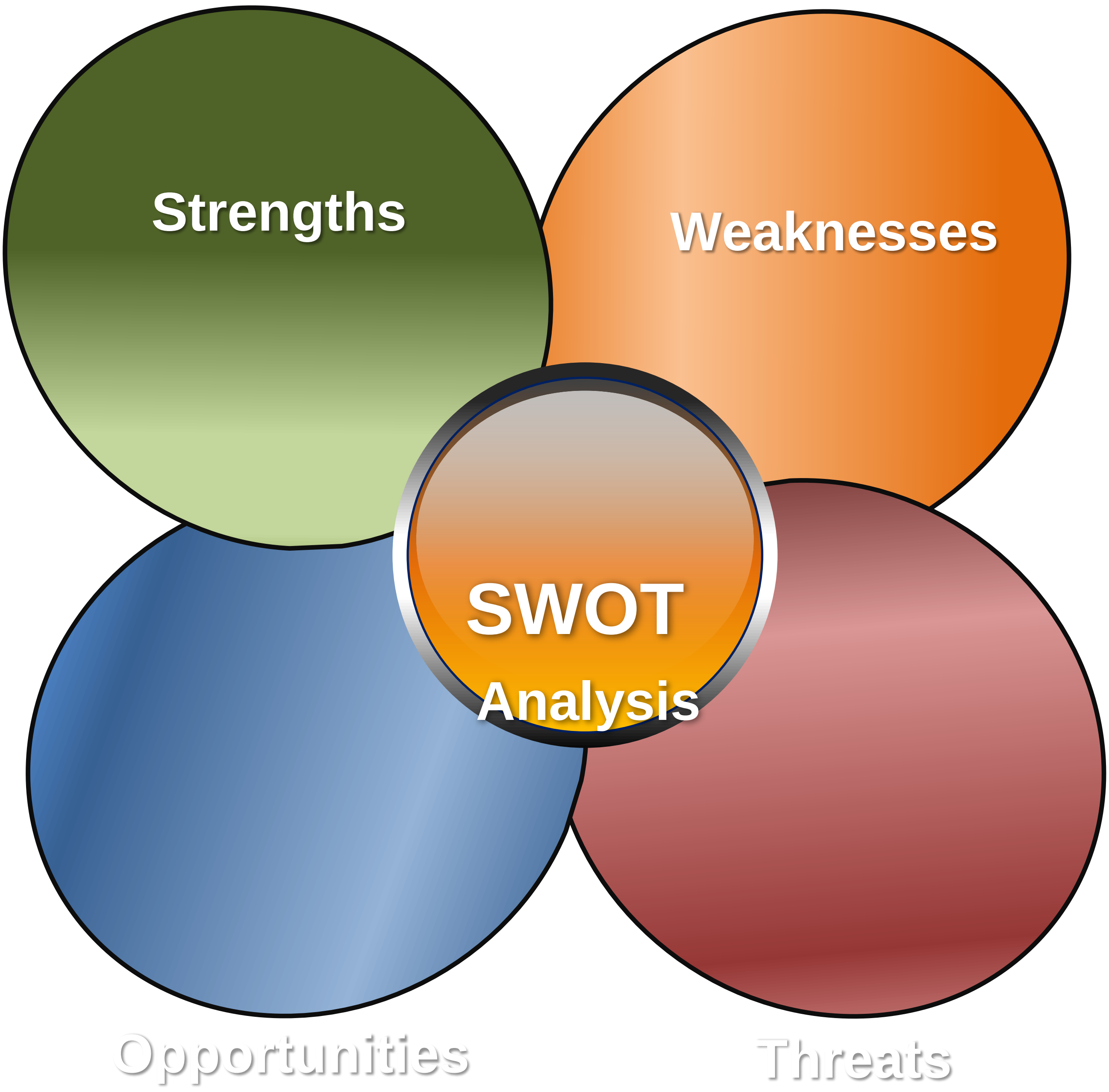
Parco naturale della Maremma
The Park covers an area of 9800 hectares and stretches along the coast from the village of Principina a Mare (municipality of Grosseto) to the village of Talamone (municipality of

Orbetello).
In its territory fall the last marshy lands near the mouth of the Ombrone, which, rich in life and still wild, are home to important colonies of marsh birds.
Further south the area is composed of the Uccellina mountains covered by dense Mediterranean vegetation and to the east, at the foot of the mountains, by vast grassy expanses, where the Spergolaia Farm is located administrative center of the regional company and the butteri seat.

Regione Toscana

Three T
Interreg Europe
European Union
European Regional Development Fund

8. S.W.O.T. Analysis



The swot analysis was carried out using the following information sources:

- Desk research
- Participated swot analysis of the tourist areas of the Tuscan coast (Project Mitomed +, Interreg Med)
- Participated swot analysis of the Tuscan coast (Smart Destination Project, Interreg Italy France Maritime)

S ***<u>Strengths</u>***

- The area can boast a natural heritage of great beauty (Parks, protected areas ...)
- Suggestive landscape
- Rich cultural heritage (villages, archaeological sites, historical centers ...)
- Excellent food and wine offer (typical products, doc, igp ...)
- High competitive capacity of some coastal tourist areas (Costa degli Etruschi)
- International reputation of the Tuscany brand
- Presence of ports and airports on the coast
- Presence of a park system
- Offer of good bathing services
- Presence of numerous beaches certified blue flags
- Cultural identity of some areas still strong
- Events

W ***<u>Weaknesses</u>***

- Weakness of public connections
- Poor maintenance of road infrastructures
- Poor maintenance of natural and cultural heritage
- Weak public-private synergies for management and promotion of coastal destinations (lack of DMO)
- Weak tourism competitiveness of some coastal areas (some tourist products of the coast are mature and need a radical renewal)

- Marked seasonality of tourist flows
- Signage of the cycle paths and trekking routes to be improved
- Quality of reception to improve
- Business skills in the tourism sector to be improved
- Urban degradation of some areas
- Seasonality of many services of tourist interest

O ***Opportunities***

- New Costa Toscana brand could allow a unitary promotion of the cultural and natural system
- Growth demand for experiential tourism could be opportunities to develop integrated tourist offer between seaside, sport, culture, food and wine
- Use Intense project to create synergies between territories and develop integrated tourist services for slow tourists
- Growth in sports tourism could be an opportunity for the areas of the coast
- Take advantage of new technologies and strategic projects of Italy- France Maritime to create a smart mobility ecosystem
- Development of events and networks and tourism brands can strengthen the tourist attraction of the area

T ***Threats***

- Loss of tourism competitiveness due to strong competition of other better connected destinations
- Sustainability risks of tourist flows concentrated on the coast in high season
- Loss of resources for disappearance of cross-border cooperation program Italy-France Maritime
- Coastal degradation and pollution
- Depopulation of small villages and loss of identity

Summary table

Strengths	**Weaknesses**
• Natural heritage • Landscape • Cultural heritage • Food and wine offer • Competitiveness of some coastal areas • Tuscany brand • Presence of ports and airports • Park system • Good bathing services • Numerous beaches with blue flags • Cultural identity of some areas • Events	• Public connections • Road infrastructure maintenance • Heritage maintenance • DMO absence • Weak tourism competitiveness of some coastal areas • Seasonality of tourist flows • Signage of cycle paths and trekking routes • Quality of reception • Entrepreneurial skills in the tourism sector • Urban degradation of some areas • Seasonality of many services
Opportunities	**Threats**
• New Costa Toscana brand • Growth in demand for experiential tourism • Intense project • Growth of sports tourism • Strategic Projects of Italy France Maritime • Events, Networks, Brands	• competition of better connected destinations • Sustainability risks of tourist flows in high season • disappearance of the Italy France Maritime program • degradation and pollution • Depopulation of small villages