Gaps and Growth Opportunities Report

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Ministry of Regional Development and EU Funds of Croatia and Tuscany Region – Economic Directorate - Tourism Department

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Description of the deliverable	The updated Gaps and Growth Opportunities Report (GGOR) is a document containing the analysis and evaluation of the results of the projects relevant to the strategic theme of Coastal and Maritime Tourism of PANORAMED project. The GGOR uses the data collected from a survey as its main source and it aims to reveal potential gaps not yet tackled by existing policies and earlier projects as well as potential growth opportunities in this specific area, with specific regards to the impact of Covid-19 on the sector.
Key words	Gaps; growth opportunities, results, project results, assessment, evaluation

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DOCUMENT HISTORY

Name	Date	Version	Description
Gaps and Growth Opportunities Report	30/11/2021	First draft	The document contains a report of the effects of the pandemic on PANORAMED involved partners.
Gaps and Growth Opportunities Report	08/04/2022	Final version_1	The document contains a report of the effects of the pandemic on PANORAMED involved partners.
Gaps and Growth Opportunities Report	22/04/2022	Final version_2	The document contains some integration suggested by partners and TWG5

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1. INTRODUCTION

The **Gaps and Growth Opportunities Report** (further in text: **GGOR**) collects, rationalizes and consolidates the work that has been carried out by the leader (Ministry of Regional Development and EU Funds of Croatia) and co-leader (Tuscany Region, Italy) of the **Work Package 5: Coastal and Maritime Tourism (WP5)** of PANORAMED project, with the constant support of the **Transnational Thematic Working Group[1] on Coastal and Maritime Tourism (TWG5)**. GGOR is and will be a basis and a catalyst for subsequent discussions and actions aimed at highlighting issues, finding solutions and planning interventions and frameworks so to implement what is necessary right to fill the gaps and seize growth opportunities.

In August 2019, the TWG5 developed the first version of the GGOR: the report was built on the results of the analysis and evaluation of the projects identified as relevant to the strategic theme of Coastal and Maritime Tourism of PANORAMED project, carried out by the TWG5 within the benchmarking activities.

It must be noted that the GGOR was released prior to the COVID-19 pandemic and therefore **didn't encompass unprecedented breakpoint in the global tourism sector**, which highly impacted not only the economy (in most of PANORAMED's partner countries, tourism accounts for a high share of the national GDP) but also services and even cultural heritage preservation.

Thus, the planned update of the GGOR after 2 years from its first release appeared to be even more necessary given the events of the 2020 and 2021 that harshly hit the tourism sector throughout the Mediterranean area: for this reason, the updated GGOR was elaborated by **analysing what factors and weaknesses emerged during the pandemics**, focusing on data, surveys and papers about the consequences of pandemic during 2020 and 2021 as well as **what solutions were put in place by the relevant projects to mitigate the impacts of the pandemics on livelihoods, environment and services**.

SCOPE OF THE REPORT

The report aims at **identifying potential gaps not yet tackled by existing policies and earlier projects**, **as well as potential growth opportunities**: the report wants to represent a basis for further discussions and actions aimed at elaborating issues, identifying solutions and planning interventions to address the challenges and seize opportunities in a joint approach that would lead towards tangible solutions. Those solutions shall outline the general potential regarding sustainable tourism within the overall MED area and, on the other hand, **illustrate a capitalization-wise framework that paves the way for better governance**.

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[1] According to the Application Form, "transnational Thematic Working Groups (TWG) will analyse the results produced by MED projects as well as by those developed by other Programs/organizations/networks active in the Mediterranean (…). In parallel, the Thematic Working Groups will define terms of reference of top down strategic projects the MED Program will finance. (…) PANORAMED foresees an initial bottom-up phase where the results produced by the MED projects and by other Mediterranean programs/initiatives on the identified thematic sectors, will be thematically clustered and analysed by transnational Thematic Working Groups to identify relevant policy, legislative, thematic, geographic, technical gaps."

In addition, the given analysis of the gaps and growth opportunities is likely to be a helpful contribution for the ongoing preparation and ultimately official endorsement of the Interreg Euro-MED to be implemented within 2021-2027 Multi-Annual Financial Framework (MFF).

Lastly, this analysis presents also a matrix displaying how the financing instruments of the new MFF, covering the Mediterranean area, **allow the identified challenges and opportunities to be properly addressed**.

The update of the GGOR can also provide the basis for future discussions and create an **opportunity to rethink the role of tourism in socio-economic and environmental development of the region**, with a comprehensive approach that aims at increasing sustainability and improving coordination and partnerships. Likely, this framework would pave the way for further empowerment of actors in the tourism value chain, including policymakers.

Lastly, the GGOR wants to be a **ground for joint planning and preparation of relevant strategic initiatives**, defining joint policy approaches at a transnational level and involving relevant key stakeholders with a synergic and long-term perspective in order to support governance processes in tackling common transnational challenges and planning potential solutions.

1.1 THE ROLE OF PANORAMED IN THE INTERREG MED 2014-2020

The Mediterranean area is one of the most heterogeneous EU cooperation areas, the PANORAMED project builds on this consideration.

PANORAMED project was approved in June 2017, with a nine-million-euro total budget and will be running until April 2022. The project has ensured a medium/long-term perspective and has had the ability to give a positive contribution to new EU strategies in the Mediterranean into the 2021-2027 programming period.

Within this timeframe, PANORAMED provided opportunities to:

- organize high level events aiming at improving the Med area's governance covering the whole territory
- promote the preparation of strategic projects, through dissemination events in each Country and the preparation and launch of Terms of Reference.

The project is organised around 10 Work Packages managed by the Partner States. Within this framework, the Work Packages dedicated to priority themes are:

- Work Package 5: "Coastal and Maritime Tourism"
- Work Package 6: "Maritime Surveillance"
- Work package 10: "Innovation"

The WPs are conceived in the framework of the governance Axis of the MED Programme, that is why the project experience is intended to provide tools to all levels of government. The collective ownership of the strategic projects has enabled to translate them into effective political leverage and showcase good examples of regional cooperation.

Strategic projects are considered as the first concrete step of a broader and longer process able to facilitate the agreement and design of future plans and activities on the tackled themes. The

strategic projects have been implemented following a territorial, integrated, inclusive and participative approach. This means that the projects have facilitated the launch and reinforcement of a process that could involve all the territories of the 12 Mediterranean countries participating to PANORAMED, involving all the regional and local institutions as well as the local communities and the civil society.

As part of its medium-term objectives, in 2019, PANORAMED has successfully launched a call for strategic projects. The projects promoted with this call, referred to the two themes of "Coastal and Maritime Tourism" and "Maritime Surveillance", aiming to:

- further improve the capacity of cooperation to add value to the investments made;
- influence the dynamics of territorial development and improvement of the governance tools;
- support/create synergies with international initiatives or commitments in the framework of international conventions/agreements.

Following this call, the strategic projects which were approved under the topic of Coastal and Maritime Tourism are **BEST MED** and **SMARTMED**: with these two projects PANORAMED has established a constant table for cooperation and exchange of good practices and solutions, in view of enhancing the capitalisation of results achieved under, but not limited to, the Interreg MED call.

2. THE MAJOR ISSUES AND STRATEGIC OBJECTIVES FOR COASTAL AND MARITIME TOURISM POLICIES IN THE MEDITERRANEAN

The Project Panoramed has investigated which are the most important issues for coastal and maritime tourism. The first release of GGOR established four principles on which to base the research: **thematic concentration, transnationality, sustainability, capitalisation and applicability**. Moreover, GGOR has established that the different levels of tourism development in each region and country of the Mediterranean should be taken into account.

The **Key Policy Paper (KPP)** has been produced through field research (focus groups and survey results), accurate and comprehensive research resulting in the identification of the main issues in coastal and maritime tourism.

The KPP was drafted at the beginning of the COVID-19 pandemic, at a time when it was not yet clear how long the tourism crisis would last. For this reason, we investigated the situation of the maritime and coastal tourism industry in relation to the main issues, and to answer the question as to whether the main issues identified in the KPP are still relevant, and why. To this end, we used statistical data and studies dedicated to the theme of crisis management in tourism in these two years of the pandemic.

For this reason, the update of the GGOR adopted a different approach: the concept and the needs that emerged after internal consultations within PANORAMED WP5 were the further development of a document that is more functional and that specifically addresses the challenges of selected key areas, in order to result in a tool for beneficiaries from different governance levels. Needless to say, many aspects of the 2019 document remain valid, which is why this document integrates GGOR with new perspectives.

2.1 BUILDING A SHARED VOCABULARY: WHAT IS MEANT BY A DMO?

First of all, it is necessary to build a shared vocabulary and in particular to improve the definitions of two terms, used in the KPP: **Destination Management** and **Destination Management Organization (DMO)**. These terms are basic concepts for the governance analysis and they can have different meanings in Mediterranean countries. Therefore, it could lead to misunderstandings.

The KPP uses these terms in relation to tourism governance. It is, therefore, important to share the international significance of these terms, in order to identify the organisations dealing with tourism governance in the partner countries of the Panoramed project. For this purpose, we propose the UNWTO definitions:

Tourism destination[2]
A tourism destination is a physical space **with or without administrative and/or analytical boundaries** in which a visitor can stay overnight[3]. It is the cluster (co-location) of products and

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[2] This operational definition of tourism destination was elaborated by the Committee on Tourism and Competitiveness (CTC) and it was adopted as a recommendation by the 22nd Session of the General Assembly of the UNWTO held on 11–16 September 2017 in Chengdu, China (A/RES/684(XXII)).

[3] In the "Glossary of tourism terms" a visitor (domestic, inbound or outbound) is classified as a tourist (or overnight visitor), if his/her trip includes an overnight stay, or as a same-day visitor (or excursionist) otherwise (IRTS 2008, 2.13). The operational definition elaborated by the CTC seems to exclude same-day visitors. A broader definition of a tourist destination should be elaborated.

services, and of activities and experiences along the tourism value chain, and a basic unit of analysis of tourism. A destination incorporates various stakeholders and **can network to form larger destinations**. It also has an intangible aspect, its image and identity, which may influence its market competitiveness.

Destination management[4]
Destination management is "the **coordinated management of all the elements** that make up a tourism destination (attractions, amenities, access, marketing and pricing)"

DMO[5]
A destination management/marketing organization (DMO) is the leading organizational entity which may **encompass the various authorities, stakeholders and professionals** and facilitates tourism sector partnerships towards a collective destination vision. **The governance structures of DMOs vary from a single public authority to a public/private partnership model,** with the key role of initiating, coordinating and managing certain activities such as implementation of tourism policies, strategic planning, product development, promotion and marketing, and convention bureau activities.

The functions of the DMOs may vary from **national to regional and local levels,** depending on current and potential needs, as well as the decentralization level of public administration. Not every tourism destination has a DMO.

DMO Goals[6]
DMOs have to achieve an optimal management of the destination, ensuring that the various authorities, all relevant stakeholders and professionals are **coordinated by a leading entity** under a **coherent strategy** and a **collective vision** pursuing a **common goal**: the **competitiveness and sustainability of the destination**.

Therefore, a DMO is a "changing concept" depending on governance level, networking and other factors. However, it is possible to identify some criteria for the definition of DMOs:

- **A DMO involves all governance levels**, from international to local, in order to facilitate tourism sector partnerships towards a collective destination vision. For example, the Panoramed network can be the basis for maritime and coastal tourism destinations in the Mediterranean.
- **A DMO is a network** (i.e. International level → among Countries; National level →between State and Regions; Regional level → among local destination; Destination → among local stakeholders).
- **There is no "one-size-fits-all" model,** and each destination adapts the nature and functions of its DMO to different variables. For this reason we can talk about a DMO whenever a network is created between public and/or private stakeholders, even if the network does not use the title "DMO".

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[4] UNWTO (2007), A Practical Guide to Tourism Destination Management, UNWTO, Madrid,
[5] UNWTO (2019), Guidelines for Institutional Strengthening of Destination Management Organizations (DMOs) - Preparing DMOs for new challenges
[6] UNWTO (2019), Guidelines for Institutional Strengthening of Destination Management Organizations (DMOs) - Preparing DMOs for new challenges

- **DMO functions may vary from national to regional and local levels**: implementation of tourism policies, strategic planning, product development, promotion and marketing, data sharing, etc…

2.2 ARE THE "MAIN ISSUES" OF KPP STILL RELEVANT?

The Covid-19 pandemic has particularly affected the tourism sector. In fact, international tourist arrivals decreased by 74% between March and December 2020, compared with the previous year[7]. It is necessary, therefore, to assess whether the five main issues identified in the original paper are still fundamental considerations for maritime and coastal tourism, or whether new, more pressing issues have emerged.

Firstly, we have summarised the contents of the KPP to guide the reader through the analysis that will be carried out in the following paragraphs. We would, of course, invite anyone requiring further details to read the original document.

The KPP identified the vision for coastal and maritime tourism:

VISION FOR COASTAL AND MARITIME TOURISM[8]

Mediterranean destinations and regions are safe, lively, authentic, and attractive for living, visiting, and investing, with their natural and cultural heritage and way of life valorised and improved.

In the first part of the statement, the attributes of the area are expressed. In the second part, tourists' experiences, as well as inhabitants' quality of life, are considered, since we need to have the inhabitants of this region satisfied with their quality of life to maintain the authenticity of the area; for visiting and work, and investment from private and public stakeholders as well. The third part of the vision statement reflects the need for keeping the way of life authentic, which could only be attained through the preservation of natural and cultural heritage and a traditional way of life. It provides opportunities for market repositioning from predominantly 'sun and sea' tourism, to special interest tourism products that are based on rich natural and cultural Mediterranean heritage. In the near future, post COVID-19, destinations need to stress safety as this would be a priority criterion for visiting.

How are we going to realise the vision statement?
Companies, as part of the strategic planning process, usually define their mission to clarify the tasks needed to implement the vision. For the future development of coastal and maritime tourism, the mission could also be expressed in the mission statement, as:

Med regions practice tourism governance that enables continuous improvements in environmental, social and economic sustainability, increases competitiveness through quality and innovation, and ensures implementation and monitoring of strategies and policies.

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[7] UNWTO dashboard https://www.unwto.org/unwto-tourism-dashboard
[8] Key Policy Paper: Coastal and Maritime Tourism in The Mediterranean, PANORAMED Project, 2020

This mission states that tourism governance should balance the three pillars – environment, community and economy. Decision-making processes should be based on relevant indicators, and progress made through quality improvement and innovative solutions. In this way, the Mediterranean as an attractive and authentic tourism region, adapted to the need of its inhabitants as well as tourists, could be achieved. Added-value innovations to business processes or products are welcome, and should be focused on differentiation as one of the strategies of tourism development. The necessity of progress monitoring is highlighted, as it is difficult to plan and execute initiatives/projects/actions without being aware of the clear outcomes of (previous) activities conducted in the area.

The KPP identifies **seasonality and weak cooperation between actors** as the major developmental challenges in the majority of the Mediterranean countries and regions. As highlighted in the vision and mission, efficient **tourism governance based on sustainable principles is a key concept** underlying all the proposed strategic issues, objectives and recommendations.

Five key issues have been identified:

1. **Data sharing and harmonisation as basis for knowledge-based decision making.**
   The problem: The majority of the EU-funded projects conducted in the Mediterranean countries and regions highlight the lack of availability of comparable data in various fields – from basic data on tourism flows and guests' profiles, to destination management and tourism governance indicators that emphasise smart and sustainable tourism. In short, there is "a serious lack of reliable and detailed data" (Peters et al 2018).

   Objective 1: Improved data collection and data harmonisation
   Recommendations:
   - Investigate the influence of, and possibilities of the tourism sector recovering from, the COVID-19 crisis (short-term recovery and long-term sustainability).
   - Define indicators and a minimum set of comparable data in tourism and related fields and thematic areas (tourism seasonality, over-tourism, same-day visitors, sustainable development, smart tourism, destination management, visitor profile).
   - Identify Big Data sources and exploitation possibilities – foster cooperation with Big Data providers (for example real-time data collection for defining accurate tourist profile segments) to be able to respond to changing tourist demand and provide predictive models.
   - Harmonise research methodologies between the most important studies (visitor survey methodology; tourism satellite account for regional/tourism product level, carrying capacity studies, etc., from the type of samples and survey instruments to analysis).
   - Harmonise definitions of different types of tourism (nautical tourism, cultural tourism, health tourism, meetings, conferences, and exhibitions segment, sport tourism, etc.) and define a minimal set of comparable data on different types of tourism.

   Objective 2: Improved data sharing

Recommendations:

- Develop approaches to and models of data sharing within countries and regions – create a platform for MED tourism statistics and best practices as an open data system, (possible partnership agreement with all stakeholders).
- Establish a platform for data sharing that could help in tourism's recovery phase after the COVID-19 crisis (impacts, data needed for long-term recovery plans).

Objective 3: Enhanced knowledge transfer and establishing knowledge networks
Recommendations:

- Identify best practices and competency centres/institutions in data collection and creation of research methodologies – establish research networks that can collaborate to enable knowledge transfer and could ensure education in the area of data collection and tourism research for destination managers and other stakeholders.
- Establish knowledge networks that could initiate and conduct research on important but rarely investigated topics (social distancing, visual pollution, impacts of other industries on tourism, the inclusion of local populations in tourism decision-making, guest-host relationships, socio-economic context of the Med, cultural degradation, etc.).
- Develop ways to include research experts in the translation of research results into recommendations for tourism practices, in collaboration with important tourism stakeholders.

2. **Integrated and informed tourism governance for smart and more resilient destinations**

   The problem: The majority of coastal and maritime tourism development problems in the Mediterranean stem from a lack of management and governance skills, poor collaboration at the destination/local level, and the often different goals of diverse stakeholder groups. Sustainable development is the common goal in the majority of tourism master plans, but is rarely implemented.

   A need for a multi-level approach to governance, that facilitates horizontal and vertical cooperation and coordination and can help in reducing the complexity of the challenges of tourism development has been recognised. Additionally, there is a need to foster stronger collaborative relationships and greater commitment to the improvement of tourism governance processes.

   Objective 1: Enhanced participatory and integrated, knowledge-based, and multilevel planning
   Recommendations:

   - Define methodology and structure of tourism master and strategic tourism plans (as well as smart specialization strategies) and develop a monitoring system of implementation including set of valorisation criteria, to adopt sustainable growth policies and practices by both public and private sector; ensure stakeholders participation (principle of inclusivity),
   - Develop (long-term) plans to restore travellers' confidence and stimulate demand after COVID-19 crisis including post COVID recovery procedures that follow the requirements of public health,

- Ensure that tourism experts are engaged in the spatial planning process and procedures on the local and regional level, and participation of DMOs as an important stakeholder and encourage cooperation between tourism scholars, public and private sector in tourism from local to national level,
- Ensure inclusion of tourism into regional/country smart specialization strategies.

Objective 2: Improved destination management systems /organizations – transition to sustainable and responsible policies and practices
Recommendations:

- Improve DMO mechanisms and empower them to address structural weaknesses and make destinations more resilient and sustainable - transformations needed in the post COVID-19 crisis (digital transformation, performance management, fast decision making),
- Develop innovative tourism governance tools that can help decision-makers such as destination data hubs and destination dashboards, and ensure stakeholders mapping as a tool for effective destination management,
- Ensure integrated management of cultural heritage and tourism activities to achieve cultural heritage conservation and sustainable tourism development,
- Include crisis management into destination tourism management plans: how to approach COVID-19 pandemic and change practices in different crisis situations (forest fires, earthquakes, refugee crises, etc.).

3. **Enhanced and innovative tourism (business) solutions**
The problem: Majority of the problems of coastal and maritime tourism in Mediterranean countries are consequences of (planned) tourism growth and tourism flows that are not evenly spread but rather concentrated in summer months and geographically on coastal areas, islands and rarely coast hinterlands. Mediterranean destinations still have not used their common market values, their 'unique selling propositions' and have not created prestigious joint tourism products aimed for the third markets nor have they promoted and shared the common identity.

Objective 1: Improved process of innovation of tourism solutions
Recommendations:

- Create mechanisms for supporting the development of new and/or for upgrading tourism products that could extend tourism season, depending on available resources and attractions (cultural tourism, MICE, manifestations, sport tourism, health and wellness, culture/heritage tourism including thematic touring, etc.) to avoid overdependence on 'sun and sea' tourism product,
- Create Med tourism offer based on tangible and intangible cultural heritage that can extend the season and promote Med identity and way of life,
- Define clusters of producers including creative industries, culture and agriculture and develop special interest tourism products that use regional sources and promote regional tourism identity with particular emphasis on environmental and ecological aspects,
- Ensure support mechanisms and investment measures for better use of ICT and digital transformation of tourism SMEs,
- Promote smart destinations – create national award system for innovations in tourism.

Objective 2: Values of Mediterranean identity and shared vision defined – Med's overall destination brand enhanced

Recommendations:

- Identify common values of Mediterranean identity as a prerequisite for creating joint tourism products (routes) and create destination brand architecture for the Mediterranean aligned to the shared vision,
- Ensure that shared vision and mission are promoted to tourism business enterprises, tourist agencies and involved human resources – ensure better coordination of national, regional and local governmental institutions and DMO's.

Objective 3: Increased competitiveness and attractiveness of tourism destinations including safety

Recommendations:

- Promote less visited but attractive locations, attractions, and destinations; internal routes for pedestrians/bikes to bring people from coast to hinterland,
- Incorporate physical distancing and other safety measures as a quality label of a destination,
- Develop methodology of categorization of tourism attractions (based on the type and attractiveness of an attraction) and action plans focused on improvements of specific attractions (accessibility, promotion, interpretation); Identify the most attractive destination spots and develop action plans to preserve their values,
- Ensure training possibilities and certification of specialized competencies related to maritime and coastal tourism, both formal and informal,
- Develop and conduct studies on ambience values of destination (destination features that can be enhanced according to visitors' experiences),
- Ensure digital transformation for SMEs in tourism and exploit digitalization opportunities.

4. **Greening tourism (reducing pressures) and improving historic, traditional and natural heritage**

   The problem: After so many decades of sustainability orientation emphasized in many tourism destination master plans, sustainability discourse and the greening of tourism seems to be slow, fragmented, and marginal.

   Sustainability, as one of the key principles of KPP and PANORAMED, needs to find its way to being visible in the governance of coastal and maritime tourism development in the Mediterranean in the near future. Moreover, during COVID-19 recovery phase destinations need to develop new tools in ensuring health standards for restoring tourists' confidence.

   Objective 1: Improved and protected tourism eco-system

   Recommendations:

   - Develop a comparable sophisticated indicator monitoring system on a regional-destination level based on existing experiences,
   - Gather best practices and design guidelines on carrying capacity and tourism ecological footprinting,
   - Develop transport policy schemes that enable accessibility of less frequently visited attractions and encourage more eco-friendly transport options,

- Set-up Mediterranean over tourism task force to monitor destinations on risk, report on trends and recommend interventions,
- Establish a formal Med network of sustainable tourism spearheaded by EC DG GROW and EP TRAN Committee.

Objective 2: Reduced pressure and adaptation to climate changes implemented
Recommendations:
- Invest in smart mobility to boost sustainable transportation,
- Minimize resource use and production of waste; control and manage the use of natural, scarce and limited resources,
- Ensure tourism flow management and monitoring of sensitive cultural and natural sites;
- Assess the role of social media, digital and other platforms in causing and reducing over tourism,
- Encourage implementation of regulations that restrict license in the housing for touristic use in congested areas.

Objective 3: Value given to protected cultural, traditional and natural heritage
- Recommendations:
- Develop tourism management/action plans for protected areas with special attention to the spatial-temporal distribution of visitors,
- Develop and implement quality standards in heritage interpretation that educates and/or involves tourists in the conservation/preservation processes,
- Improve the management of visitors in the protected areas (heritage and nature sites of different types and sizes).

5. **Informing, educating, and engaging stakeholders for changing behaviour**
   The problem: Mediterranean destinations are characterized by specific destination life-cycle and according to many studies, the great majority of the destinations have gone through the initial phases (beginning, development and growth) and are in the 'maturity' phase with stagnating tourism flows coupled with over tourism and infrastructural problems. Therefore, without intervention in the planning of tourism development, differentiation based on the mix of products and appropriate governance methods, destinations could remain at their position with a possible decline in tourism flows.
   Therefore, in order to induce the change, all stakeholders should become aware of their market position, so they can jointly realize the need to adapt to the trends in the fast-changing environment. Crisis and uncertainties, including COVID-19 emphasize the urgency to comprehend the complexities and react accordingly. They also offer an opportunity for repositioning and transformations.

Objective 1: Increased environmental and social awareness
Recommendations:
- Create internal and external media mix to increase the environmental and social responsibility of all actors involved in tourism activities,

- Create marketing campaigns to raise awareness about the need 'to change' existing practices and to learn how to adapt and make destinations more resilient,

- Ensure that stakeholders are aware of the need to take actions, to use the COVID-19 crisis to re-develop and make their products more competitive, to support sustainable development and to become socially responsible.

Objective 2: More efficient communication, collaboration, and growth of competencies

Recommendations:

- Precisely define and map stakeholders in tourism and develop plans for informing and educating various groups of stakeholders within destinations for better communication (private and public sector),

- Engage research and higher educational institutions (formal and informal education) to improve their curricula regarding the aspects of communication, collaborations, adoption to market changes and/or crises and the need for reduced pressures,

- Attract stakeholders to participate in e-learning, long-life learning methods and innovative ways of learning.

As can be seen, the issues identified in the KPP relate to a period when the Covid-19 pandemic had already had its devastating impact on the tourist industry. The link between the objectives listed above and the pandemic is well explained.

Therefore, it can be assumed that the pandemic has not changed the main issues affecting maritime and coastal tourism. Instead, these problems need to be tackled with greater determination, because addressing the economic weaknesses of the tourist system before the pandemic is even more urgent today. However, increased awareness of the problems caused by the pandemic in coastal and maritime tourism allows the creation of a priority scale of issues. This topic will be developed further in the following paragraphs.

2.3 CONSEQUENCES OF THE PANDEMIC ON COASTAL AND MARITIME TOURISM

The update of GGOR starts from a basic consideration: between the first report and the update the Covid-19 pandemic has occurred. This event has changed European citizens' way of life in general, and in particular maritime and coastal tourism.

Tourism is one of the sectors most affected by the COVID-19 pandemic: the number of international tourist arrivals declined by 74% between March and December 2020 compared with the previous year[9].
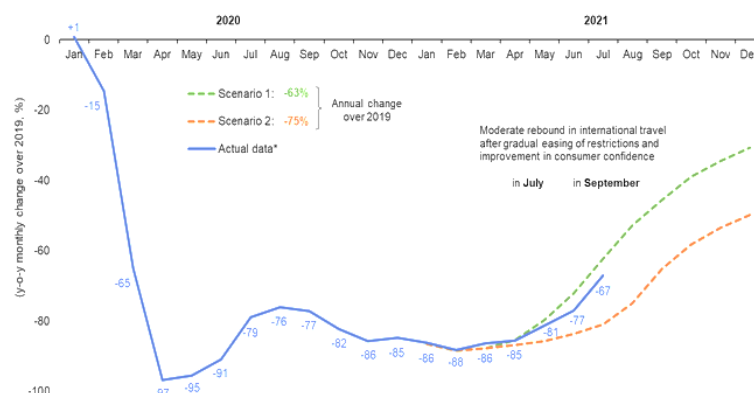
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[9] UNWTO dashboard https://www.unwto.org/unwto-tourism-dashboard

International Tourist Arrivals in 2020 and Scenarios for 2021 (y-o-y monthly change, %)

In 2021, there were signs of improvement for the tourism industry[10]:

- international tourism rebounded moderately during the Northern Hemisphere summer season, boosting results for the third quarter of the year, <u>especially in Europe</u>.
- International tourist arrivals (overnight visitors) increased by 58% in July-September 2021 compared with the same period of 2020. However, they remained 64% below 2019 levels.
- The uplift in demand during the third quarter of 2021 was driven by increased traveller confidence due to rapid progress on vaccinations and the easing of entry restrictions in many destinations.
- In January-September 2021, international tourist arrivals worldwide were 20% lower than the same period in 2020, but still 76% below 2019 levels.
- Europe saw an 8% decline of international tourist arrivals compared with 2020, which is 69% below 2019.
- Despite the improvement in the third quarter of the year, the pace of recovery remains slow and uneven across world regions due to varying degrees of mobility restrictions, vaccination rates and traveller confidence.
- Export revenues from international tourism could reach US$ 700-800 billion (around EUR 646-738 billion) in 2021, a small improvement from 2020 but less than half the US$ 1.7 trillion (around EUR 1.57 trillion) recorded in 2019.
- The direct economic contribution of tourism is estimated at US$ 1.9 trillion (around EUR 1.75 trillion) in 2021 (measured in tourism direct gross domestic product), well below the pre-pandemic value of US$ 3.5 trillion (around EUR 3.23 trillion).

These figures do not describe the more general consequences of the tourism crisis. In particular, the effect on tourism expenditure should be taken into account. Indeed, the tourist product is not just a commodity, but a set of goods and services purchased by tourists. The purchasing behaviour of tourists is likely to vary according to numerous variables: demography, length of

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[10] UNWTO – World Tourism Barometer, November 2021

stay, type of accommodation used, purpose of the visit and many other factors. These elements lead to differences in tourism expenditure.
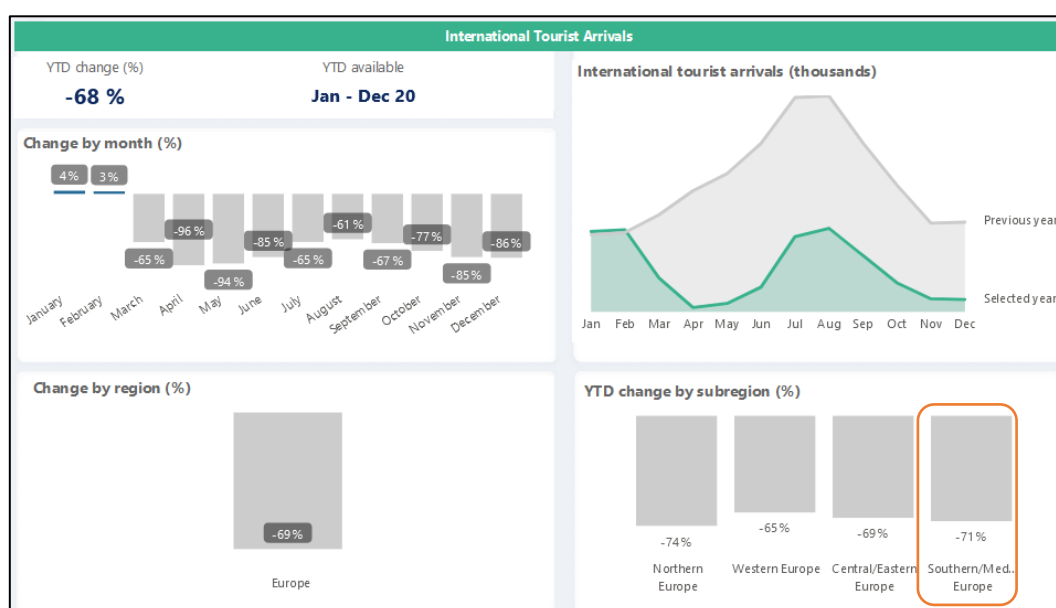
Therefore, it is clear that the decline of tourist demand is only one aspect, albeit the most obvious one, of a change that has affected very important elements of the tourism economy. For example, it will be necessary to investigate the change in tourist expenditure resulting from reduced mobility caused by health regulations and fear of the viral contagion.

2.3.1 An overview of Covid-19 impact on EU-27 tourism

This section provides an overview of tourism results (international tourist arrivals) at a global and regional level, as well as by country groupings.
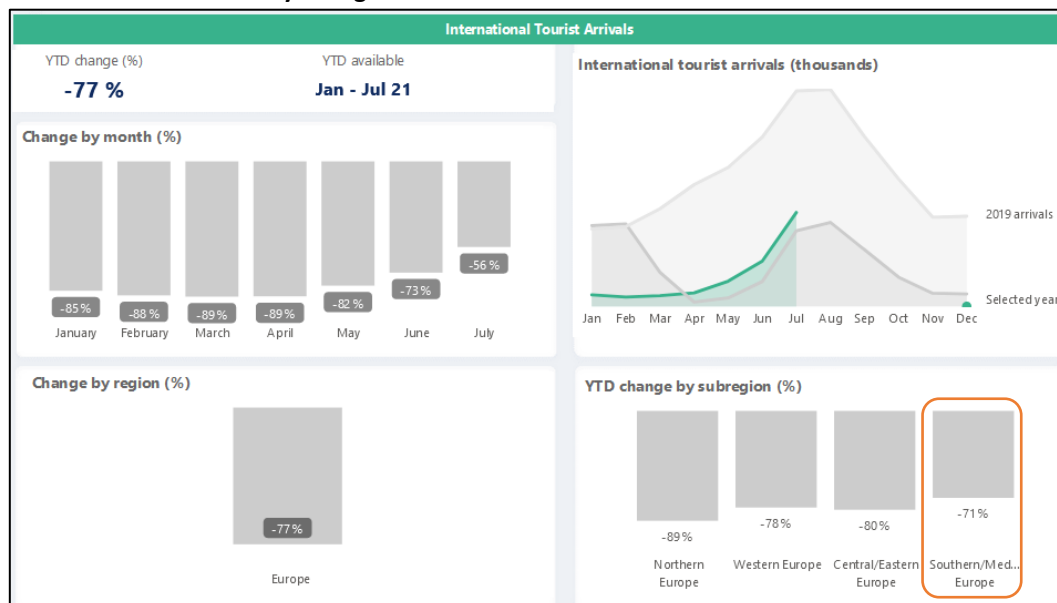
The comparison between the monthly arrivals of 2019 and 2020[11] immediately highlights the impact of the Covid-19 pandemic on tourism. The monthly variations in spring are higher, but in summer there is a partial recovery. The main cause was the generalised lockdown during springtime. In percentage terms, the Mediterranean area has suffered a decrease of 71% on the entire year.

Monthly change in international tourist arrivals 2020 vs. 2019

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[11] Source: United Nations World Tourism Organization (www.unwto.org). Most of 2021 data are provisional.

Monthly change in international tourist arrivals 2021 vs. 2019

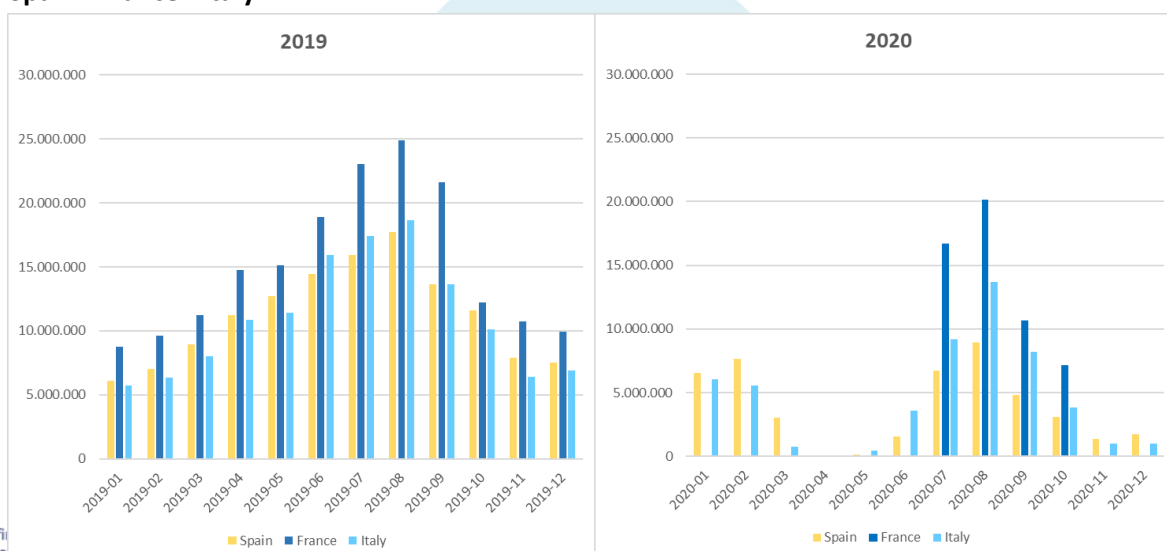## 2.3.2 Covid-19 impact on all 12 Panoramed partner countries

This section provides a focus on the tourism results of a sample of Panoramed partner countries. The sample was selected on the basis of the data availability. Only countries with complete monthly data from 2019/01 to 2020/12 have been included. In order to better understand trends and changes in each destination, the graphs compare countries with the same order of magnitude of tourist flows, so that variations can be easily identified.

The monthly data[12] from the partner countries at national level confirm the general trend. However, we can see that the decline in the summer months is much smaller than in the spring period. Coastal tourism is very important in these countries, therefore it affects national statistics more than the European average.
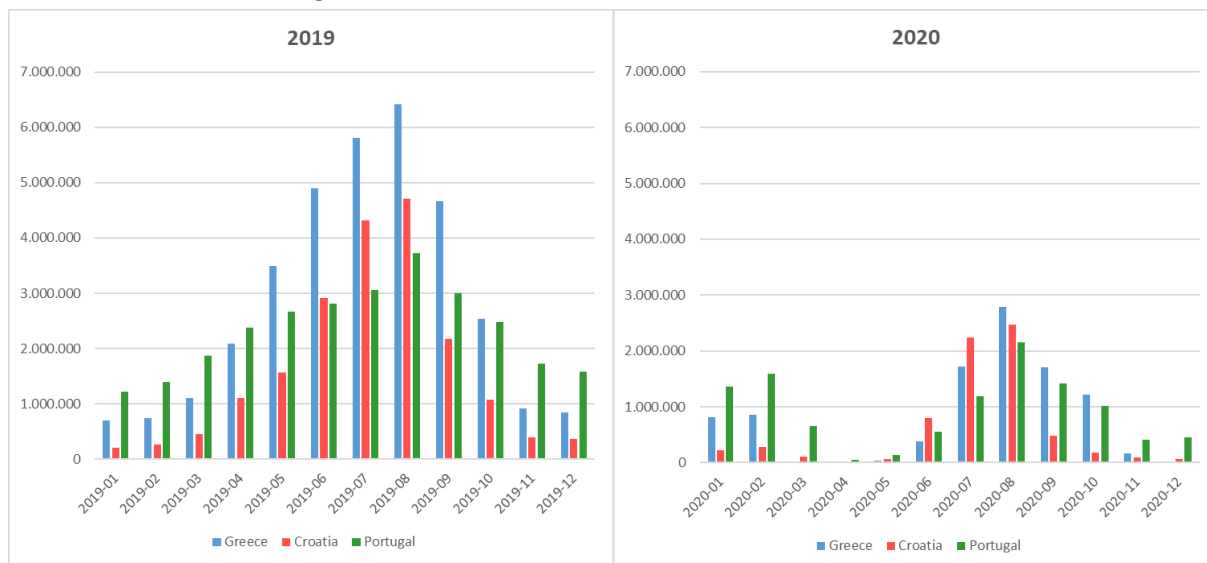
A critical issue for tourism innovation and sustainability is emerging: the pandemic has encouraged traditional tourism (sun, sea and sand) concentrated in the summer.
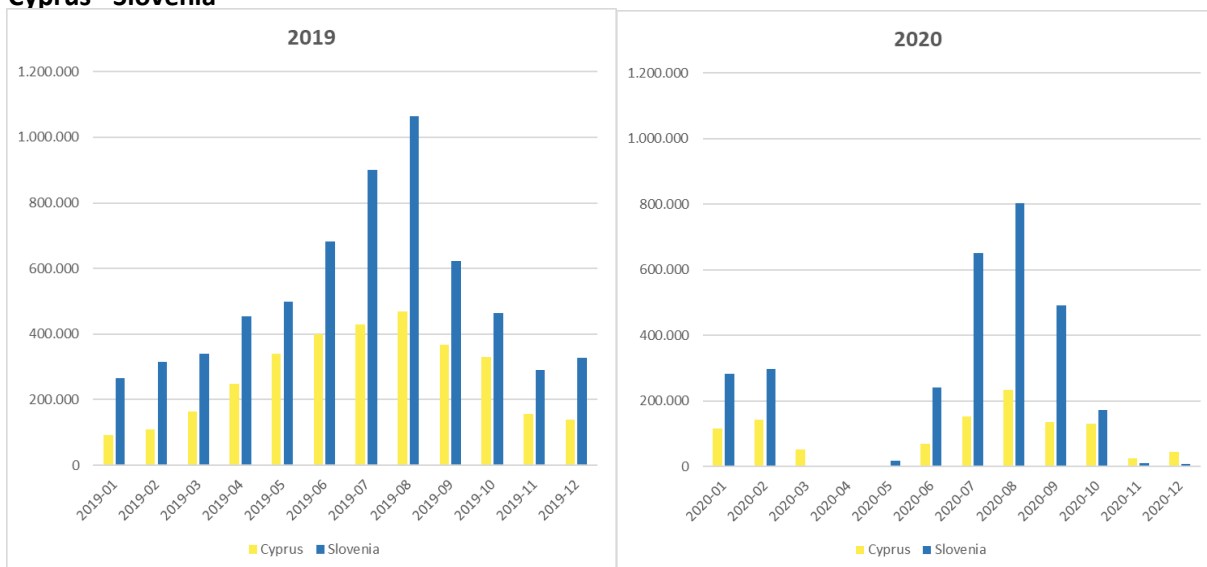
2019 AND 2020 ARRIVALS

Spain - France - Italy[13]
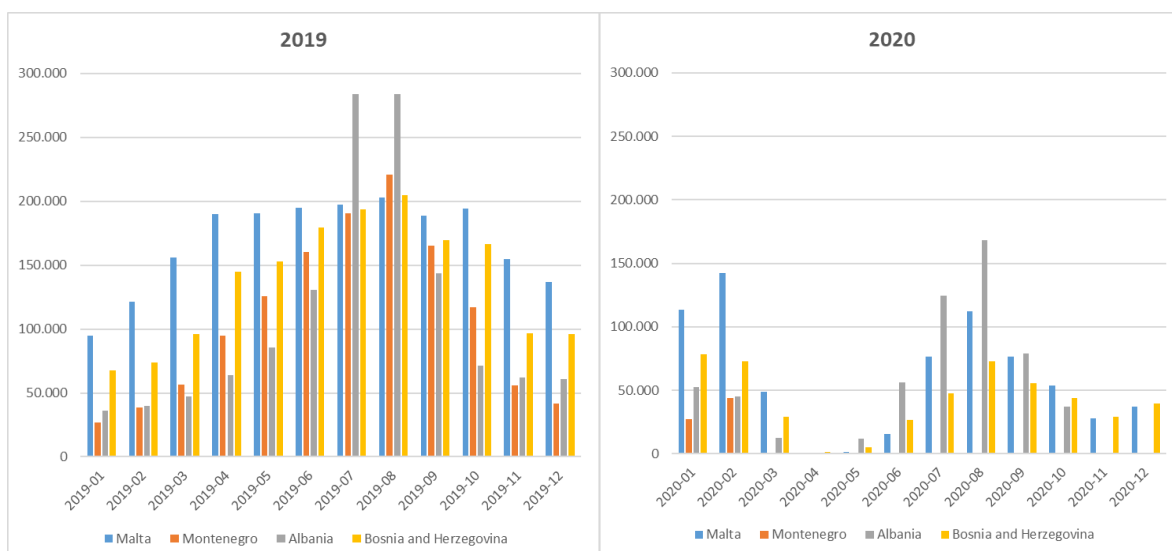
Greece[14] - Croatia - Portugal

Cyprus - Slovenia[15]

[14] Greece missing data (2020 03 and 12) are confidential.
[15] Slovenia missing data (2020 03) are not available.

Malta - Montenegro[16] - Albania[17] - Bosnia and Herzegovina

2.3.3 Covid-19 impact colour scale

The tables below[18] show the monthly change in arrivals and overnight stays in each of the partner countries between 2019 and 2020. The colour scale (green positive, red negative) shows at a glance the difference between domestic and foreign tourists. The main drop in arrivals and overnight stays was due to travel restrictions for international tourism (partially reduced in summer).

Domestic tourism in some countries has reduced the damage of the pandemic. In particular, France, Italy Croatia and Slovenia have limited losses, especially thanks to traditional summer tourism.

ARRIVALS AT TOURIST ACCOMMODATION - 2020 VS. 2019

FOREIGN TOURISTS

	2020-01	2020-02	2020-03	2020-04	2020-05	2020-06	2020-07	2020-08	2020-09	2020-10	2020-11	2020-12
Greece	27,40%	19,92%		-99,72%	-99,83%	-98,08%	-80,03%	-67,06%	-68,38%	-54,41%	-84,73%	
Spain	5,79%	5,39%	-66,42%	-100,00%	-99,75%	-97,97%	-81,10%	-80,14%	-89,87%	-90,56%	-91,16%	-87,49%
France							-55,93%	-57,28%	-79,47%	-83,36%		
Croatia	2,24%	0,91%	-80,81%	-99,92%	-97,67%	-76,00%	-51,18%	-52,89%	-82,21%	-90,08%	-87,44%	-93,45%
Italy	5,12%	-11,94%	-94,16%	-99,88%	-99,61%	-93,01%	-73,65%	-57,85%	-58,33%	-77,89%	-94,96%	-95,48%
Cyprus	27,23%	23,59%	-68,91%	-99,99%	-100,00%	-93,26%	-82,88%	-77,05%	-79,72%	-74,13%	-91,57%	-87,72%
Malta	18,77%	13,64%	-68,54%	-99,69%	-99,65%	-98,91%	-74,19%	-58,79%	-75,61%	-79,80%	-90,09%	-88,60%
Portugal	10,95%	5,95%	-66,07%	-99,69%	-99,27%	-96,83%	-82,96%	-69,80%	-74,29%	-78,18%	-88,79%	-86,22%
Slovenia	6,56%	1,76%		-100,00%	-99,00%	-83,41%	-67,06%	-66,92%	-73,84%	-88,14%	-97,58%	-98,00%
Montenegro	4,38%	12,34%										
Albania	55,82%	1,48%	-75,10%	-100,00%	-98,05%	-82,99%	-77,43%	-49,32%	-54,55%	-68,79%		
Bosnia and Herzegovina	24,25%	-6,61%	-75,45%	-99,75%	-99,61%	-94,90%	-94,01%	-87,95%	-88,33%	-88,47%	-84,15%	-78,43%

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[16] Montenegro missing data (2020 from 03 to 12) are not available.
[17] Albania missing data (2020 11 and 12) are confidential.
[18] Methodological note: the empty cells are due to the lack of either data from 2019 or 2020.
Source: Eurostat (https://ec.europa.eu/eurostat) and Agency for Statistics of Bosnia and Herzegovina (http://www.bhas.ba). Missing data are not available or confidential. Most of the 2021 data is provisional.
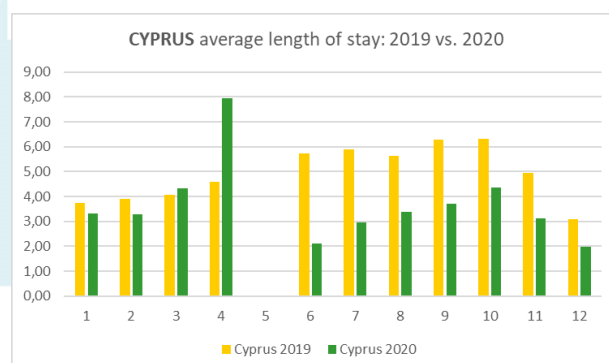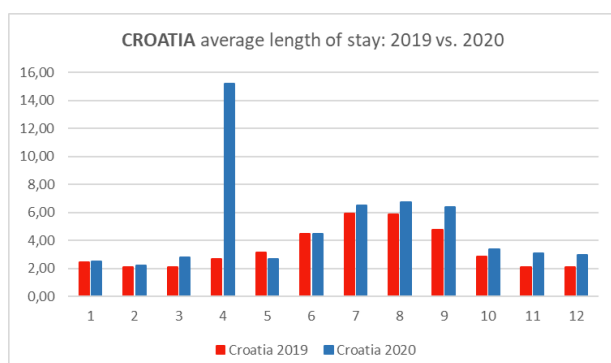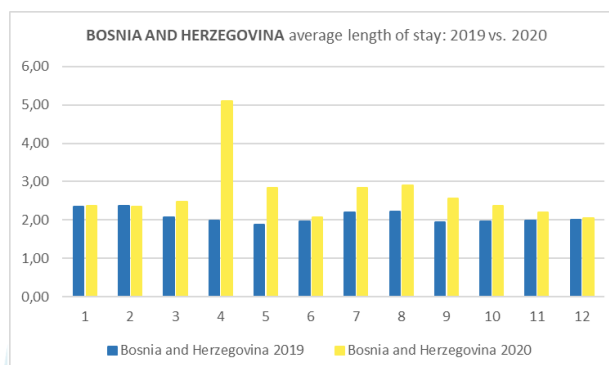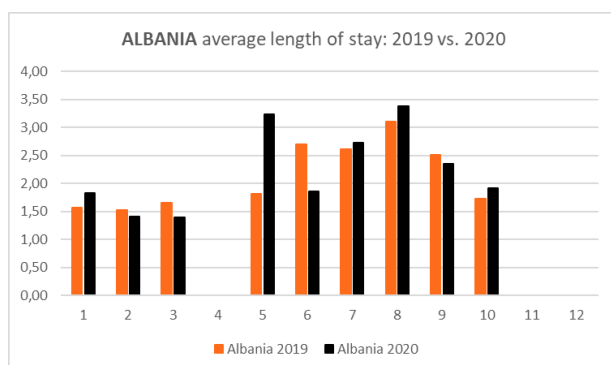
DOMESTIC TOURISTS

	2020-01	2020-02	2020-03	2020-04	2020-05	2020-06	2020-07	2020-08	2020-09	2020-10	2020-11	2020-12
Greece	9,36%	13,47%		-98,34%	-95,72%	-66,65%	-30,48%	-23,06%	-39,95%	-44,66%	-79,43%	
Spain	7,45%	11,95%	-65,96%	-100,00%	-97,83%	-79,90%	-33,82%	-21,88%	-33,71%	-51,55%	-74,67%	-68,84%
France							-12,18%	-1,54%	-37,96%	-24,99%		
Croatia	10,74%	13,51%	-66,98%	-99,14%	-85,82%	-37,00%	-4,61%	19,30%	-24,00%	-47,22%	-59,15%	-64,77%
Italy	5,80%	-11,91%	-87,64%	-98,83%	-91,26%	-60,54%	-16,98%	0,20%	-14,01%	-40,45%	-78,32%	-79,87%
Cyprus	33,01%	46,81%	-65,38%	-99,70%	-100,00%	-10,91%	47,19%	48,88%	122,21%	87,18%	-53,71%	-37,20%
Malta	23,32%	36,76%	-70,88%	-99,32%	-95,55%	-8,45%	117,67%	119,96%	145,82%	37,98%	-35,94%	-2,19%
Portugal	13,27%	23,65%	-64,00%	-95,75%	-86,72%	-56,59%	-29,83%	-9,24%	-17,57%	-23,83%	-62,42%	-55,93%
Slovenia	6,68%	-13,26%		-100,00%	-88,64%	1,71%	176,14%	172,29%	195,55%	1,82%	-94,00%	-95,40%
Montenegro	-10,31%	16,44%										
Albania	36,99%	27,23%	-73,17%	-100,00%	-63,02%	-4,48%	-13,26%	-23,46%	-26,62%	-16,79%	-29,10%	-41,03%
Bosnia and Herzegovina	3,78%	5,49%	-59,57%	-96,80%	-87,70%	-56,22%	3,42%	35,12%	-1,27%	-29,14%	-45,24%	-30,74%

TOTAL

	2020-01	2020-02	2020-03	2020-04	2020-05	2020-06	2020-07	2020-08	2020-09	2020-10	2020-11	2020-12
Greece	15,05%	15,72%		-99,23%	-99,06%	-92,30%	-70,23%	-56,61%	-63,41%	-51,97%	-81,68%	
Spain	6,64%	8,95%	-66,18%	-100,00%	-98,89%	-89,25%	-57,85%	-49,56%	-64,64%	-73,06%	-82,30%	-76,73%
France							-27,37%	-19,24%	-50,56%	-41,15%		
Croatia	5,83%	5,39%	-76,78%	-99,80%	-96,05%	-72,69%	-48,06%	-47,61%	-77,51%	-82,85%	-77,69%	-83,22%
Italy	5,53%	-11,92%	-90,51%	-99,35%	-96,01%	-77,42%	-47,14%	-26,45%	-39,61%	-61,91%	-84,81%	-85,29%
Cyprus	29,44%	31,44%	-67,82%	-99,94%	-100,00%	-82,52%	-64,18%	-49,87%	-63,14%	-60,63%	-83,30%	-68,46%
Malta	19,43%	17,48%	-68,88%	-99,66%	-99,39%	-92,12%	-61,14%	-44,74%	-59,59%	-72,23%	-82,13%	-72,84%
Portugal	12,05%	14,23%	-65,15%	-98,15%	-94,79%	-80,23%	-61,03%	-42,05%	-52,54%	-58,97%	-76,63%	-70,88%
Slovenia	6,60%	-5,26%		-100,00%	-96,55%	-64,58%	-27,60%	-24,69%	-20,84%	-62,71%	-96,36%	-97,12%
Montenegro	0,87%	12,94%										
Albania	45,09%	14,63%	-74,18%	-100,00%	-86,17%	-56,77%	-56,09%	-40,72%	-44,83%	-47,71%		
Bosnia and Herzegovina	16,23%	-1,98%	-69,76%	-98,94%	-96,83%	-85,17%	-75,44%	-64,46%	-67,45%	-73,69%	-69,66%	-58,91%

OVERNIGHT STAYS AT TOURIST ACCOMMODATION - 2020 VS. 2019 [19]

FOREIGN TOURISTS

	2020-01	2020-02	2020-03	2020-04	2020-05	2020-06	2020-07	2020-08	2020-09	2020-10	2020-11	2020-12
Greece	15,76%	13,13%		-99,58%	-99,82%	-98,67%	-81,42%	-67,68%	-66,61%	-49,14%	-74,37%	
Spain	1,85%	3,75%	-58,97%	-100,00%	-99,38%	-98,18%	-83,00%	-81,47%	-91,46%	-91,88%	-87,75%	-84,89%
France	3,11%	1,89%	-63,16%	-100,00%	-100,00%	-88,60%	-53,19%	-54,83%	-71,48%	-83,14%		
Croatia	8,48%	10,93%	-72,70%	-98,99%	-97,72%	-74,34%	-44,56%	-43,91%	-72,44%	-84,90%	-73,30%	-84,26%
Italy	3,28%	-3,19%	-89,01%	-98,27%	-98,10%	-93,05%	-72,11%	-54,70%	-51,38%	-72,34%	-89,13%	-92,33%
Cyprus	12,79%	6,06%	-66,68%	-99,99%	-99,99%	-96,75%	-88,53%	-81,95%	-83,19%	-76,82%	-92,49%	-90,29%
Malta	5,38%	7,41%	-64,68%	-98,67%	-98,70%	-98,80%	-79,60%	-63,23%	-78,27%	-79,68%	-89,06%	-88,34%
Portugal	5,91%	8,62%	-57,41%	-98,87%	-98,65%	-96,59%	-83,93%	-71,87%	-71,28%	-75,72%	-83,70%	-81,41%
Slovenia	0,97%	3,74%	-73,23%	-98,54%	-98,27%	-83,78%	-66,48%	-64,30%	-67,97%	-82,53%	-92,01%	-93,92%
Montenegro	15,15%	14,09%										
Albania	33,37%	-7,72%	-81,78%	-100,00%	-97,84%	-87,83%	-72,63%	-46,88%	-53,72%	-57,61%		
Bosnia and Herzegovina	24,56%	-6,17%	-70,81%	-98,88%	-99,19%	-94,52%	-93,09%	-85,39%	-85,59%	-86,50%	-81,67%	-74,73%

DOMESTIC TOURISTS

	2020-01	2020-02	2020-03	2020-04	2020-05	2020-06	2020-07	2020-08	2020-09	2020-10	2020-11	2020-12
Greece	4,47%	10,13%		-97,29%	-95,16%	-72,78%	-35,81%	-21,10%	-41,34%	-45,23%	-72,36%	
Spain	4,84%	10,76%	-65,01%	-100,00%	-96,94%	-80,57%	-37,36%	-24,12%	-35,66%	-49,80%	-72,26%	-67,91%
France	5,76%	8,18%	-52,09%	-95,72%	-91,07%	-46,13%	-12,58%	-3,52%	-11,74%	-16,47%		
Croatia	7,33%	11,32%	-60,87%	-97,95%	-86,45%	-43,53%	-8,11%	16,87%	-18,76%	-45,32%	-54,95%	-60,04%
Italy	3,29%	-8,46%	-75,77%	-92,05%	-84,53%	-63,30%	-26,35%	-6,72%	-7,84%	-34,53%	-64,69%	-72,20%
Cyprus	26,32%	43,13%	-58,48%	-98,58%	-97,80%	-13,63%	30,52%	47,71%	106,54%	93,76%	-45,49%	-32,25%
Malta	26,13%	47,25%	-67,32%	-99,38%	-93,37%	-24,43%	91,87%	115,13%	140,85%	51,56%	-29,06%	10,44%
Portugal	13,17%	26,07%	-58,46%	-94,66%	-85,90%	-55,14%	-31,29%	-12,70%	-11,23%	-20,72%	-57,05%	-52,21%
Slovenia	3,22%	-8,97%	-64,98%	-99,60%	-91,90%	-4,08%	154,23%	163,69%	217,52%	24,51%	-81,08%	-86,09%
Montenegro	-11,11%	17,34%										
Albania	99,21%	19,96%	-74,25%	-100,00%	-29,93%	-26,22%	3,29%	-6,44%	-35,96%	-15,47%	-42,14%	-83,16%
Bosnia and Herzegovina	5,11%	4,39%	-49,32%	-93,15%	-84,77%	-60,21%	19,09%	62,33%	21,96%	-17,77%	-40,74%	-30,91%

TOTAL

	2020-01	2020-02	2020-03	2020-04	2020-05	2020-06	2020-07	2020-08	2020-09	2020-10	2020-11	2020-12
Greece	8,45%	11,31%		-98,96%	-99,33%	-95,95%	-75,69%	-60,05%	-64,08%	-48,59%	-73,33%	
Spain	2,80%	6,19%	-61,21%	-100,00%	-98,60%	-92,17%	-65,49%	-56,28%	-73,22%	-79,72%	-82,01%	-78,17%
France	4,97%	6,58%	-55,28%	-96,99%	-93,84%	-60,75%	-25,86%	-18,02%	-32,10%	-36,17%		
Croatia	8,01%	11,07%	-69,31%	-98,85%	-96,60%	-72,42%	-42,52%	-39,86%	-69,84%	-79,94%	-67,22%	-76,31%
Italy	3,29%	-5,81%	-82,37%	-95,41%	-92,88%	-79,47%	-48,96%	-26,13%	-33,51%	-58,57%	-75,03%	-80,02%
Cyprus	14,92%	10,59%	-65,72%	-99,90%	-99,93%	-93,61%	-82,03%	-69,81%	-78,31%	-72,88%	-89,52%	-79,72%
Malta	6,73%	10,44%	-64,87%	-98,70%	-98,55%	-95,93%	-73,65%	-56,30%	-69,79%	-75,36%	-84,69%	-78,95%
Portugal	8,27%	14,15%	-57,73%	-97,62%	-95,29%	-82,73%	-64,85%	-46,29%	-51,47%	-61,66%	-74,75%	-70,51%
Slovenia	1,76%	-2,53%	-69,94%	-98,80%	-96,56%	-63,42%	-18,72%	-14,30%	-3,01%	-49,47%	-87,95%	-91,10%
Montenegro	6,37%	14,90%										
Albania	68,80%	5,84%	-78,25%	-100,00%	-75,39%	-70,36%	-54,24%	-35,69%	-48,35%	-42,30%		
Bosnia and Herzegovina	17,59%	-2,82%	-63,62%	-97,27%	-95,20%	-84,27%	-68,21%	-53,78%	-56,93%	-68,32%	-66,33%	-58,06%

2.3.4 Covid-19 impact on tourists' average length of stay (2019 vs. 2020)[20]

Tourist average length of stay is an important index for evaluating the model of tourist behaviour. A high average length of stay in maritime and coastal tourism often reveals the presence of a tourism product based on the three Ss (sun, sea and sand), often with the addition of an F (fun).
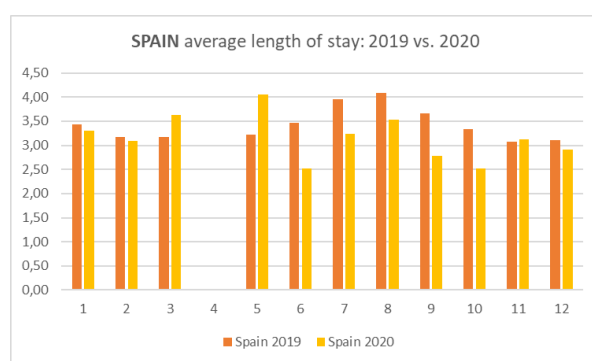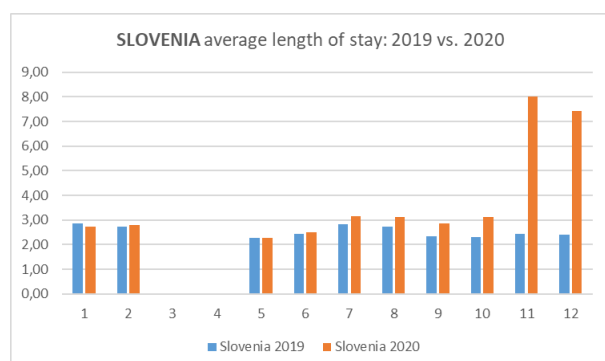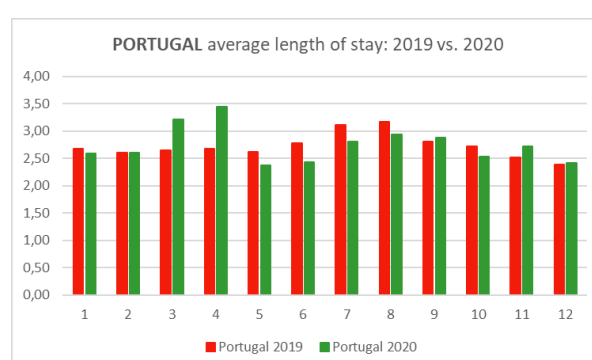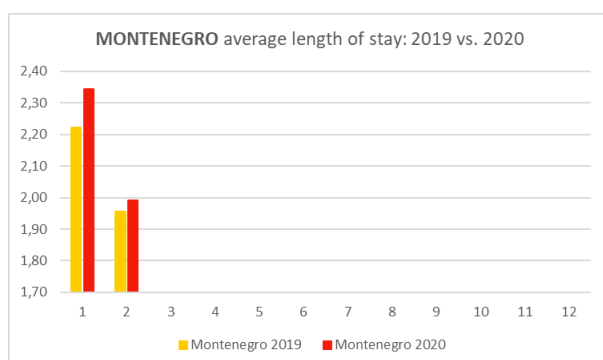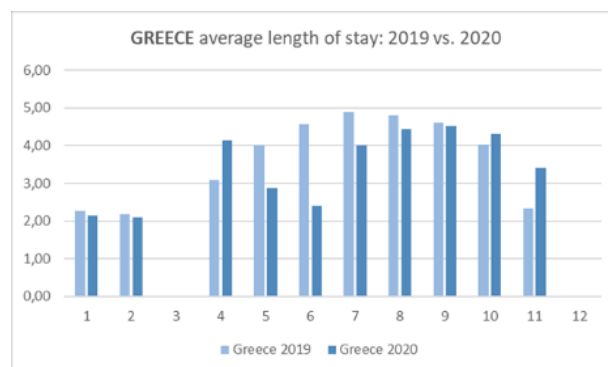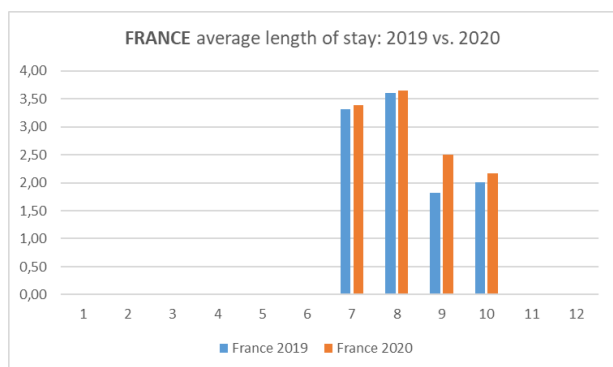
The average length of stay is defined as "high" based on comparison between destinations. For example, in Italy the average national stay in 2019 was 3.32 days. However, in seaside sites it can exceed 8 days, while in heritage and nature sites it is just over two days[21], even if they are coastal destinations.

ALBANIA average length of stay: 2019 vs. 2020

BOSNIA AND HERZEGOVINA average length of stay: 2019 vs. 2020

CROATIA average length of stay: 2019 vs. 2020

CYPRUS average length of stay: 2019 vs. 2020

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[20] Source: Eurostat (https://ec.europa.eu/eurostat) and Agency for Statistics of Bosnia and Herzegovina (http://www.bhas.ba). Missing data are not available or confidential. Most of the 2021 data is provisional.
[21] Source: ISTAT – Istituto Nazionale di Statistica (Italy)

FRANCE average length of stay: 2019 vs. 2020

GREECE average length of stay: 2019 vs. 2020

MONTENEGRO average length of stay: 2019 vs. 2020

PORTUGAL average length of stay: 2019 vs. 2020

SLOVENIA average length of stay: 2019 vs. 2020

SPAIN average length of stay: 2019 vs. 2020

The graphs above show several anomalies. These are probably the consequence of lockdowns due to the pandemic, therefore they can be considered as exceptions to the rule. However, the lack of significant changes could be the sign of critical issues, as explained in the next paragraph.

2.3.5 Final considerations

Tourism in the last 20 years has gone through several crises. Already, before the Covid-19 pandemic, most of these events were caused by phenomena outside the tourism industry (for example: collapse of the World Trade Centre, Sars epidemic of 2003, 2008 economic crisis, terrorist attacks in the Mediterranean and in European countries, etc). Therefore, the Covid-19 pandemic is just the latest crisis that tourism has had to face, even if it is the first truly global one.

It is important to point out that the tourism industry is particularly sensitive to external crises - thus it is necessary not only to react to a crisis (with tools to assist tourism businesses), but also to manage the crisis before it occurs. Therefore, because it has to face new threats to tourism,

destination management cannot be limited solely to marketing management; crisis management capacity should also be developed.

An example of the importance of crisis management emerges from the analysis of the data in this paper. The reduction of contagion in the summer reveals a feature of the Covid-19 pandemic that has affected coastal tourism: both in 2020 and 2021, the main tourist flows were concentrated in the summer months. It seems that traditional costal tourism (sun, sea and sand) has been able to react to the pandemic more than new tourism products (cultural heritage, nature, slow tourism, etc).

From the interviews and questionnaires carried out for this paper emerges the concern that the pandemic has not been a push towards innovation, but instead has seen a consolidation of traditional travel behaviour. There is, therefore, a risk of a return to the past. It is likely that in the next few years, tourism will have to be managed with greater determination to avoid a break in the innovation process that has been started by the projects of the Panoramed partners.

Nevertheless, in the coming years it will be important to put in place governance tools to address the challenges of innovation and sustainability in tourism, and, perhaps, put maritime and coastal tourism on the right path.

In summary, the tourism industry is one of the most susceptible and vulnerable to crises, and countries share the challenges regarding this. Indeed, the analysed data show similar patterns, and provide evidence of the common need for tools and shared best practices in crisis management at the local, regional and national levels. The demand for policies and tools to deal with crises in a more rational and organised way is only expected to increase.

Within this framework, the issues identified by the KPP are still strategically important for the development of maritime and coastal tourism. However, a new scale of priorities has been built in light of the situation that has emerged in the last two years of the pandemic:

1. Firstly: **Integrated and informed tourism governance for smart, sustainable and more resilient destinations**. The creation of a tourism governance system is the main challenge to be faced, in particular building networks at all levels (local, regional, national and international DMOs).
2. Secondly: **Data sharing and harmonisation as the basis for knowledge-based decision making**. Data sharing is essential for the development of data-driven policies.
3. Finally, **greening tourism (reducing pressures) and improving historic, traditional and natural heritage**. The development of greener tourism destinations is the ultimate goal of tourism policies

The other main issues identified in the KPP (enhanced and innovative tourism (business) solutions; informing, educating, and engaging stakeholders to modify behaviour) were analysed in the Panoramed survey in a cross-cutting manner, since they were considered to be closely related to the others. In particular, they have been analysed in the section "Problems and solutions for the dissemination " which can be found in the focus on the other key issues.

3. EXISTING POLICY FRAMEWORK IN THE MED AREA: UPDATE

The first release of the GGOR deals with different European strategies, initiatives and programmes concerning coastal and maritime tourism in the Mediterranean region. The pandemic crisis requests new strategic approaches. In the framework of the existing policy in the Med area each initiative has considered the Covid situation and elaborates indications on how the new reality can impact on the area. Hereby an overview of different materials on the pandemic and Post Pandemic situation is suggested.

EUSAIR

The European Strategy for the Adriatic-Ionian Region addresses how to consider the post-Covid situation in the elaboration of the Strategy. Hereby some significant events and documents on the topic:

- **Plenary session: Imagining post-COVID EUSAIR – How to cooperate in the new reality? The twin digital and green transition as a regional response to the Covid-19 crisis[22] (Jan. 2021)**
  The plenary session revealed some notes and priorities:
  - Coordination is a key factor in the response to the pandemic crisis;
  - Crisis as opportunity to accelerate some trends, one of which is digital one;
  - Strengthening resilience and achieving the strategic long-term objectives of the digital, green and fair transitions
- **EUSAIR Stakeholders Conference (Nov. 2021)[23]**
  RE-ROUTING TOURISM AIMING AT SUSTAINABLE GREEN MACROREGION
  The Conference aimed to raise awareness and encourage better visibility of the priorities and objectives of the EUSAIR strategy among all stakeholders in general, and especially in the field of sustainable tourism and culture.
  - First session: sustainable management of cultural routes in EUSAIR;
  - Second session: over-tourism and recovery in the light of trends and perspectives, and the implications for all sectors closely linked to tourism, in particular in terms of future projects, flagships, blue growth, connectivity and the environment;
  - Third session: revision of the EUSAIR Action Plan, encouraging innovation and sustainability in all EUSAIR pillar sectors in a post-pandemic Europe.
- **Final Report EUSAIR Slovene Presidency 20-21[24] (May 2021)**
  The report among several topics deals with:
  - Pillar Blue Growth: Spatial maritime plans are one of the foundations of the realization of the Green Plan
  - Pillar Sustainable Tourism: Designing high quality gastronomic products

WESTMED

The WESTMED initiative faces how to consider the post-Covid situation in the achievement of its objectives. Hereby some significant events and documents on the topic:

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[22] Plenary session on 28/01/2021 - Summary of the interventions: https://www.adriatic-ionian.eu/2021/01/28/plenary-session-imagining-post-covid-eusair-how-to-cooperate-in-the-new-reality-the-twin-digital-and-green-transition-as-a-regional-response-to-the-covid-19-crisis/ and Report of the 5th EUSAIR Forum Belgrade https://www.adriatic-ionian.eu/document-type/annual-forum-reports/
[23] Press release: https://mint.gov.hr/UserDocsImages/2021_dokumenti/211126_Press-Release_EUSAIR.pdf
[24] Report: https://www.adriatic-ionian.eu/wp-content/uploads/2021/06/EUSAIR-Final-Report.pdf

- **WESTMED - STAKEHOLDER CONFERENCE (Nov. 2021) - Corridors to Sustainable Blue Development[25]**
  One of the topics of the conference was on maritime and coastal tourism,
  The main points raised were the relevance of reflecting on the challenges faced by the sector before the pandemic in order to support a resilient and robust recovery. Paradoxically the COVID-19 pandemic and consequent socio-economic crisis that affected the sector so severely, also highlighted some avenues for sustainable recovery.

- **Second Ministerial Conference on Sustainable Blue Economy (Feb. 2021)[26]**
  The Ministers adopted a new declaration, firmly committing to cooperate closely and address joint challenges in key blue economy sectors. They agree to promote transformative policies and tools such as maritime clusters or maritime spatial planning, and support the overall shift towards low-emission technologies and circular blue economy. New joint activities and projects will be set up on a wide range of issues, including "blue skills", marine litter, marine renewable energies and nature-based tourism.

- **Sustainable Tourism in the western Mediterranean Strengthening ties and opportunities with Southern partners BUILDING THE RESILIENCE OF THE TOURISM SECTOR Webinar (Dec. 20)[27]**
  The meeting faces the resilience of Tourism sector Learning from Existing Projects

UNEP Map Mediterranean Strategy for Sustainable Development

- **The Mediterranean Action Plan's strategic response to COVID-19: a blueprint for action[28]**
  In the context of the articulation of the UNEP COVID-19 strategic response, this document identifies the main issues and priorities of relevance to the mandate of UNEP/MAP.
  The reflection is articulated around the blocks set forth in the UNEP's COVID-19 Response paper "Working with the Environment to Protect People£, namely:
  (1) The medical and humanitarian emergency phase;
  (2) A transformational change for nature and people;
  (3) Investing to build back better;
  (4) Modernising global environmental governance, with a focus on elements related to the UNEP/MAP—Barcelona Convention system's legal and policy framework.

- **Working with the environment to protect people: Covid-19 Response (May 2020)[29]**
  The paper gives a firs Covid-19 Response. To prevent future outbreaks, it is necessary to address the threats to ecosystems and wildlife, including habitat loss, illegal trade, pollution and climate change.

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[25] https://www.westmed-initiative.eu/publications/#fiches
[26] Report: "Towards a Sustainable Blue Economy in the Mediterranean region" - 2021 Edition https://ufmsecretariat.org/wp-content/uploads/2021/01/UfM-Towards-a-Sustainable-Blue-Economy-in-the-Mediterranean-region-EN_v2.pdf
[27] https://www.westmed-initiative.eu/publications/#webinars
[28] Details on 4 blocks: https://www.unep.org/unepmap/mediterranean-action-plans-strategic-response-covid-19-blueprint-action
[29] https://www.unep.org/resources/working-environment-protect-people-covid-19-response?_ga=2.92975967.357323503.1643716336-1596100891.1643716336

Process, study and report from European Commission

- **Tourism transition pathway – Co-creation process**[30]

  The updated EU Industrial Strategy highlights the need to accelerate the green and digital transition of EU industry and its ecosystems. To that end, it proposes working together with industry, public authorities, social partners and other stakeholders. This co-creation process will lead to the publication of transition pathways for each ecosystem. Tourism, as the most heavily hit ecosystem by the COVID-19- crisis, will be the first to have its transition pathway. The actions of this pathway will form the key elements of the upcoming European tourism agenda 2030/2050.

- **The EU Blue Economy Report 2021**[31]

  The EU Blue Economy Report has become the reference to understand past developments, trends and future opportunities in the blue economy and all individual economic activities related to our seas and oceans in the EU and its Member States. In its fourth edition, the yearly EU Blue Economy Report continues to analyse the scope and size of the Blue Economy in the European Union. It aims at providing support to policymakers and stakeholders in the quest for a sustainable development of the oceans, coastal resources and, most notably, to the development and implementation of polices and initiatives under the European Green Deal and in particular with the insight of the Sustainable Blue Economy communication. This edition also analyses the impacts of the COVID-19 crisis on the various sectors.

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[30] https://ec.europa.eu/growth/sectors/tourism/tourism-transition-pathway_it
[31] https://op.europa.eu/en/publication-detail/-/publication/0b0c5bfd-c737-11eb-a925-01aa75ed71a1

4. IDENTIFYING GAPS AND GROWTH OPPORTUNITIES

One of the objectives of the PANORAMED project is to identify the gaps and growth opportunities of tourism. To do so, it is of outmost importance to collect information, issues and feedback not only from PANORAMED project partners, but also from stakeholders primarily of the Interreg MED network: their actions in the projects tacking the main challenges of maritime and coastal tourism is one of the main sources of information of this report. Therefore, this operational approach is meant to acknowledge the value given by field experiences of the partners and wants to draw out guidelines for the future of European programmes.

The panel includes professionals who work on projects in Europe or in public administration of all levels. The following graphs and tables illustrate the survey sample, which is composed of 26 stakeholders. Sixteen questionnaires were collected.

The respondents to the questionnaires represent different points of view both in terms of the countries involved and the type of organisation they work for. Moreover, the job positions of the respondents are diverse, giving the survey a wide variety of approaches to issues affecting maritime and coastal tourism.

SAMPLE OF THE SURVEY	
COUNTRY	**NAME OF ORGANIZATIONS**
International Organisation	International Union for Conservation of Nature (IUCN Med)
International Organisation	European Regions for Competitive and Sustainable Tourism (NECSTouR)
International Organisation	Conference of Peripheral Maritime Regions (CPRM)
International Organisation	Conference of Peripheral Maritime Regions - Intermediterranean Commission (CPMR-IMC)
Bosnia-Herzegovina	The Tourist board of Herzegovina-Neretva canton
Crete	Region of Crete
Croatia	Ministry of Tourism and Sport
France	Syndicat Mixte du Canigó Grand Site
Greece	Ministry of Tourism
Italy	Veneto Region – Tourism Department
Italy	Foundation for Research and Innovation – F.R.I.
Italy	Italian National Association of Municipalities – Tuscany Branch
Italy	Regional Government of Tuscany - Tourism Department
Italy	Lazio Region
Malta	The energy and water agency - Malta
Slovenia	RDA Green Karst, Ltd.
Spain	Regional Ministry of Tourism of Andalusia

SOURCE: PANORAMED SURVEY 2022

Are your replies related to a specific project?
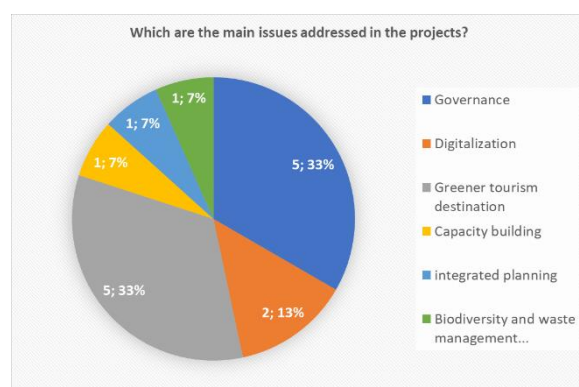
- YES — 12; 71%
- NO — 5; 29%

SOURCE: PANORAMED SURVEY 2022

Some of the respondents gave their opinions according to the position they hold and others according to their role in various projects. The graph shows how many responses are related to one's role in specific projects and how many to their position within their organisation.

It should be noted that the answers to the main questions were often very broad and concerned not only specific experiences with the projects, but also the general activities of the organisations. Thus, we were able to take full advantage of the skills and experiences of the respondents.

Which are the main issues addressed in the projects?

- Governance — 5; 33%
- Digitalization — 2; 13%
- Greener tourism destination — 5; 33%
- Capacity building — 1; 7%
- integrated planning — 1; 7%
- Biodiversity and waste management... — 1; 7%

SOURCE: PANORAMED SURVEY 2022

Respondents said that the most commonly addressed issues are governance (5 projects) and greener tourism destinations (5 projects), whereas the issue of digitalisation and data sharing for tourism analysis has been addressed in 2 projects. The graph also shows other topics that are related but not the same as the three main issues identified in the KPP.

To touch briefly on the details of the projects, they address from different points of view the issues of maritime and coastal tourism, including:

- development of smart, inclusive and sustainable tourism, primarily high seasonality and lack of cooperation of key actors in the sector;
- empowering the public and private actors of the tourism sector;
- development of a transferable and sustainable Tourism Business Model;
- enhancing cross-sectoral local and regional policies, improving integrated planning strategies, and providing stakeholders with effective training and tools to manage, measure, and promote ecotourism
- development of sustainable policies to more efficiently promote natural resources and cultural heritage in coastal and adjacent maritime areas
- setting a more responsible and sustainable tourism development model; transition from the 3S (Sea-Sun-Sand) tourism of insular tourist destinations during the summer to an alternative, sustainable, all-year-round use of these areas
- integration of regional tourism and conservation policies in Mediterranean protected areas through the creation of ecotourism itineraries;
- creating a digital ecosystem among different cross-border regions to strengthen governance and better promote tourism destinations
- promoting the use of smart and open data to better manage tourism flows in natural and cultural heritage sites.

In the following paragraphs, we will analyse in detail the individual projects carried out by the partners who responded to the survey.

The first part describes the projects ("horizontal reading") and how they have helped addressed the key issues for maritime and coastal tourism. In the second part, an overall description ("thematic reading") of the various issues will be provided.

The reason to disclosing these selected projects' results, even though some of them are still in the process of being produced, is to highlight their complementary in tackling tourism governance from various aspects. Moreover, the listed findings also offer space for further correlations that might go beyond the KPP and thus enable the projects' results, such as trainings and data sharing, to be conveyed and embedded into the three priorities that are guiding the analysis under this document.

Finally, it is worth noting that a similar rationale has been followed during the organizational process along with thematical development for the sake of WP5 High Level Event.

4.1 GAPS AND GROWTH OPPORTUNITIES PROJECT BY PROJECT

PROJECT TITLE	*BEST MED* *It aims to enhance Mediterranean Governance, being the main challenges to tackle seasonality and the lack of effective cooperation among main tourism actors, including citizen participation on the policies design.*		
PROGRAMME	Interreg-MED		
TYPE OF PROJECT	Strategic Project		
KEY ISSUES	**EXPERIENCES, RESULTS, DELIVERABLE, SOLUTIONS**	**GAPS**	**GROWTH OPPORTUNITIES**
GOVERNANCE	**Best Med Open Platform** is an open-access IT tool to gather the data for coastal tourist destinations and for internal areas, allowing local and regional policy-makers to upload and monitor indicators of the areas where the MED S&C Path Model will be applied **Med S&C Path Model.** The model aims to achieve an integrated planning and management of cultural routes in Mediterranean destinations, based on sustainability principles. The model contributes to enhancing governance of routes and paths, by allowing greater levels of cooperation between regional authorities, the managers of cultural routes/paths and other key stakeholders in the territory. **Network of national and regional Sustainable Tourism Observatories (NSTO)** It is a common light infrastructure supported by States and Regions participating in the MED Programme will be created to implement the	▪ Stakeholder resistance ▪ Unskilled Personnel ▪ Standardized procedures ▪ Rigidity of the regulatory system ▪ National/regional differences in the administrative procedures, create difficulties in disseminating and implementing best practices in different territories.	▪ Involvement of stakeholders from different governance levels and different sectors ▪ Learning initiatives to cover the gap ▪ Start from experiences of emerging network ▪ Support at all stages of implementation of best practices.

	planning tools (e.g. BEST MED Open Platform) – working in progress **Workshops, Seminars, Training tools**		
DIGITALIZATION AND DATA SHARING	**Best Med Open Platform** **Network of national and regional Sustainable Tourism Observatories (NSTO)**	▪ Stakeholder resistance ▪ Unskilled Personnel ▪ Standardized procedures ▪ Rigidity of the regulatory system ▪ Lack of a collaboration with private partners that own valuable although non official data for the tourism Industry	▪ Start from experiences of emerging network ▪ Involve private sector showing results on how digitalization can help businesses to flourish ▪ Support at all stages of implementation of best practices.
GREENING TOURISM DESTINATION	**Charter on Sustainable Tourism** (to be presented) **Indicator monitoring system**	▪ Stakeholder resistance ▪ Unskilled Personnel ▪ Standardized procedures ▪ Rigidity of the regulatory system ▪ Lack of technological tools/solutions	▪ Start showing impact on local communities resulting from activities of greening touristic products ▪ Support at all stages of implementation of best practices.
COVID 19 AND CRISIS MANAGEMENT			▪ Disposal of studies and tools for relaunching sustainable tourism

BEST MED Open platform

This platform allows the exchange of experiences and information among the stakeholders, contributing a method by which the competitiveness of tourist destinations can be achieved for designing policies, benchmarking and monitoring the results of the strategies and policies.
You are invited to apply for the account to use all platform features.

Enter platform

Enter platform and never show this again

33

Platform features

Interactive Tool

Best Med open platform is an interactive tool for your data input in order to measure compliance with the Med Sustainable Path & Cultural Route model.

Destination management

The results of gathering the indicators underline the importance of involving all tourism stakeholders in destination management.

Tourism analysis

Indicators help tourism stakeholders analyse tourism's current impact on local economies, environments, and societies.

Better decision making and planning in tourism

The platform's content allows better decision making and planning as well as improved policy environment and processes in tourism.

The platform can be used by the following stakeholders:

Managers and **coordinators** of the Cultural Routes of the Council of Europe and other noncertified cultural routes.

National, regional and local **public authorities** related to **culture and tourism**

Other **interest groups**, including **NGOs**

PROJECT TITLE	*DESTIMED PLUS* *It brings together 9 Mediterranean Regions to develop and promote Ecotourism in their protected areas. DestiMED Plus builds on the successes of MEET and DestiMED projects and aims to improve levels of integration between regional tourism and conservation policies in Mediterranean protected areas through the creation of ecotourism itineraries which are developed using a collaborative approach, both locally and regionally.*		
PROGRAMME	**Interreg - MED**		
TYPE OF PROJECT	Capitalisation project		
KEY ISSUES	**EXPERIENCES, RESULTS, DELIVERABLE, SOLUTIONS**	**GAPS**	**GROWTH OPPORTUNITIES**
GOVERNANCE	The project produced several outputs and deliverables on environmental matters. https://destimed-plus.interreg-med.eu/what-we-achieve/deliverables-database/ **GOVERNANCE AND POLICY TRENDS AND CHALLENGES IN REGIONAL MEDITERRANEAN ECOTOURISM (2021)** This report analyses the current tourism policy and governance situation, with regards to tourism and conservation, in the nine regions and pilot actions participating in DestiMED PLUS project across the Mediterranean.	- Unskilled Personnel; - Rigidity of the regulatory system; - Stakeholder resistance - Lack of financial support to participation of stakeholders in pilot actions	- At national and regional level are DMOs: ask their support with the participation of both the public and the private sector as well as the research institutions for dissemination of results, and involvement of stakeholders and recommendations for tourism practises. - Disseminate clear added value and examples that present a proof of concept (e.g. best practises and their return for territories)
DIGITALIZATION AND DATA SHARING	List of Indicators and training platform (Work in progress).	- Stakeholder resistance; - Unskilled Personnel - Lack of technological tools/solutions	- Disseminate clear added value and examples that present a proof of concept. - Availability of tools and a training platform on data and environmental matters. - The use of common and harmonised data and tools allows aware policy decisions.
GREENING TOURISM DESTINATION	The project produced several outputs and deliverables on environmental matters.	- Stakeholder resistance; - Unskilled Personnel;	Disseminate clear added value and examples that present a proof of concept.

	https://destimed-plus.interreg-med.eu/what-we-achieve/deliverables-database/ **ANALYSIS OF SUSTAINABILITY INDICATORS (CAPITALISATION BASELINE) 2020** This analysis is a collation of methodologies and indicators which will help DestiMED PLUS to define the sustainability assessments for ecotourism packages (environmental, economic, social, governance and conservation). **THE ECOLOGICAL FOOTPRINT AND BIOCAPACITY BALANCE OF DESTIMED PLUS DESTINATIONS** Report provides an assessment of the Ecological Footprint and biocapacity of DestiMED PLUS Pilot Action countries and regions and discusses the implications of current resource supply and use in these regions for the development of tourist offers.	▪ Rigidity of the regulatory system	
COVID 19 AND CRISIS MANAGEMENT	**SHIFTING THE FOCUS OF TOURISM FOR LASTING CHANGE** Featuring two case study examples from pilot actions in Spain and Albania, this report card explores the impact of the Covid-19 pandemic on the Mediterranean tourism industry, with a particular look at how it has affected tourism in protected areas.		▪ New COVID conditions are opportunities for change in destinations and changes in demand.

PROJECT TITLE	EMbleMatiC PLUS
	The EMbleMatiC project's overall objective is to create and test a NEW and radically different tourism offer based on the features of the involved mountains and offering an alternative to the traditional holiday by the sea.
	The project's strategic objectives are:
	To re-balance tourist flows concentrations between the sea and the mountain, to extend the season and to improve economic returns for the territories.
	To co-build and experiment a slow tourism offer located in the hinterland coastal mountainous area (by the creation of 9 eco-itineraries based on the emblematic singularities of each territory) to improve the international recognition of our singularities: shared communication actions should lead the territories toward the definition

PROGRAMME	Interreg-MED
TYPE OF PROJECT	Study Project + Pilot Project

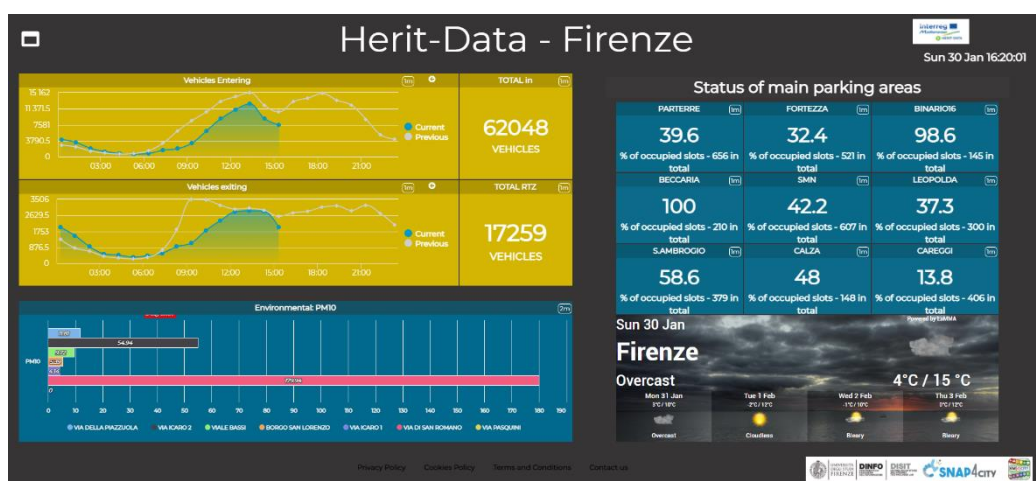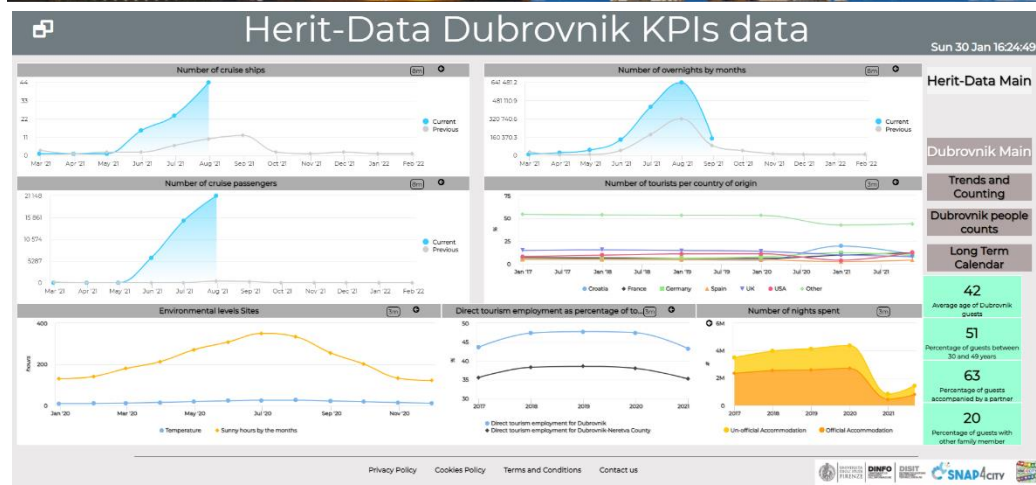| KEY ISSUES	EXPERIENCES, RESULTS, DELIVERABLE, SOLUTIONS	GAPS	GROWTH OPPORTUNITIES
GOVERNANCE		Unskilled Personnel; Lack of technological tools/solutions	▪ To foster meetings with group of selected stakeholders for two way exchanges
DIGITALIZATION AND DATA SHARING		▪ Lack of harmonisation	▪ The increase availability of digital tools is an opportunity to facilitate the collection, exchange and interpretation of data
GREENING TOURISM DESTINATION	The project produced materials for study phase, testing phase, transferring phase, communication https://emblematic.interreg-med.eu/what-we-achieve/our-outcomes-and-productions/	▪ Unskilled Personnel;	▪ Availability of materials can be an interesting point to involve and propose learning pathways to tourism operators and stakeholders
COVID 19 AND CRISIS MANAGEMENT			

PROJECT TITLE	*HERIT-DATA*
	HERIT-DATA promotes the use of smart and open data to better manage tourism flows in natural and cultural heritage sites. The project aims to identify innovative solutions, with the support of new technologies and big data, to reduce the negative impacts of tourism on cultural and natural heritage sites.
PROGRAMME	Interreg-MED
TYPE OF PROJECT	Integrated territorial Project

KEY ISSUES	EXPERIENCES, RESULTS, DELIVERABLE, SOLUTIONS	GAPS	GROWTH OPPORTUNITIES
GOVERNANCE	No. 6 Tools to learn more about tourism data and consequently act with specific policies (Herit Data Platform)	▪ Rigidity of the regulatory system; ▪ Lack of technological tools/solutions; ▪ Lack of Open Data	▪ Involve local actors in spreading results and tools implemented ▪ Use Herit-Data Platform in governance decisions
DIGITALIZATION AND DATA SHARING	No. 6 Tools to learn more about tourism data and consequently act with specific policies (Herit Data Platform). App "FeelFlorence" to help visitors to better organize their visits	▪ Stakeholder resistance; ▪ Unskilled Personnel; ▪ Rigidity of the regulatory system; ▪ Lack of communication among different entities that collect, manage and exchange data due to internal rules (e.g. privacy…)	▪ Involve local actors in supporting and spreading the use of the data; ▪ Learn and use data to understand tourism and make prediction at private and public level ▪ Use Herit-Data Platform as a fixed supporting tool at disposal of local administrations
GREENING TOURISM DESTINATION	Herit Data Platform foresees an Indicator monitoring system dealing with environmental topics: carrying capacity; overtourism; environmental monitoring, such as PM10, twitter vigilance on selected topics (e.g. negative feedbacks);	▪ Stakeholder resistance; ▪ Lack of financial resources and use of the available funds for other most urgent matters (different funds allocation) ▪ Lack of technological tools/solutions ▪ Unskilled Personnel	▪ Involve local actors in encouraging and spreading the use of the data ▪ Disseminate results achieved to encourage the use of data and make predictions ▪ Foster learning to understand and use data
COVID 19 AND CRISIS MANAGEMENT	App "FeelFlorence" use functions like: "skip the line" not just to escape long lines to the main museums, but also to guarantee more security and distances, helping to avoid overcrowded areas and keeping people more distanced.		▪ Integrate in ordinary tools news functions useful to prevent COVID and to respond to tourists exigences of more cautious and careful

FOCUS ON: HERIT DATA PLATFORM -
https://www.snap4city.org/dashboardSmartCity/view/index.php?iddasboard=MzExNQ==

Examples of data managed

- Basic data on tourism flows and guests' profiles
- Traffic data
- Closed public parking slots
- People flows
- Environment
- Twitter analysis/vigilance on selected topics (e.g. negative feedbacks)
- Carrying capacity

PROJECT TITLE	INCIRCLE
	INCIRCLE aims to support insular and scarcely inhabited MED areas to meet the increasing environmental challenges caused by tourist activities by promoting the application of circular economy principles in the tourism sector.
	The mission is: enhance the sustainability and attractiveness of MED touristic insular and low-density areas through Circular Tourism, preserving the quality and availability of natural resources as well as improving the quality of life of residents & tourists.

PROGRAMME	Interreg - MED
TYPE OF PROJECT	Pilot Project + Capitalisation Project

KEY ISSUES	EXPERIENCES, RESULTS, DELIVERABLE, SOLUTIONS	GAPS	GROWTH OPPORTUNITIES
GOVERNANCE			
DIGITALIZATION AND DATA SHARING			
GREENING TOURISM DESTINATION	**Knowledge Platform** Sets the premises for the exchange of already acquired knowledge, tools, methods and good practices in the field on circular economy applying to the tourism sector, ensuring further transferring and capitalization of existing knowledge in the tourism sector. **https://www.incircle-kp.eu/**	▪ Stakeholder resistance; ▪ Unskilled Personnel; ▪ Standardized procedures; ▪ Rigidity of the regulatory system; ▪ Lack of technological tools/solutions	▪ Availability of tools, best practises ready to use for destinations and territories
COVID 19 AND CRISIS MANAGEMENT			

PROJECT TITLE	**MITOMED+ M&C MANAGEMENT MODEL** *aims to improve sustainable and responsible maritime and coastal tourism planning in the Mediterranean area, through a series of recommendations, tools and practices based on the work done and results of MITOMED+ project, the CPMR-IMC and NECSTouR policy works, the Interreg MED Sustainable Tourism Community results, among others.* *The Model can be used by M&C tourism destinations to assure the tourism sustainability and gain competitive advantage, increasing the benefits tourism brings to the territory and the local community.*		
PROGRAMME	**Interreg - MED**		
TYPE OF PROJECT	Pilot Project + Capitalisation Project		
KEY ISSUES	**EXPERIENCES, RESULTS, DELIVERABLE, SOLUTIONS**	**GAPS**	**GROWTH OPPORTUNITIES**
GOVERNANCE			
DIGITALIZATION AND DATA SHARING			
GREENING TOURISM DESTINATION	**MANAGEMENT MODEL** https://mitomed-plus.interreg-med.eu/index.php?id=11112		▪ Availability of tools of governance ▪ To engage other regions, destinations and stakeholders that are invited to implement the MITOMED+ model in their territories in order to promote the development of a favorable ecosystem for the implementation of interventions of sustainable integrated tourism development.
COVID 19 AND CRISIS MANAGEMENT			

PROJECT TITLE	SMART DESTINATION
	The project aims at creating a digital eco-system among different cross-boarding regions (Tuscany, Liguria, Nice Cote D'Azur, Sardinia) to strengthen the governance and better promote the tourism destinations. It has been developed a joint methodology, an homogeneous taxonomy and a system for data sharing, starting from the digital data included in the web platform for regional tourism promotion. The development of 2 proof of concepts (SMART MONIT and SMART TOUR) helped to test the system.

PROGRAMME	Italy-France Maritime 2014-2020
TYPE OF PROJECT	Pilot project on data interoperability – Strategic agreement

KEY ISSUES	EXPERIENCES, RESULTS, DELIVERABLE, SOLUTIONS	GAPS	GROWTH OPPORTUNITIES
GOVERNANCE	The project contributed to the multilevel governance in terms of using web platform and sharing data to promote cross-borders destinations. http://interreg-maritime.eu/web/smartdestination Several living labs and testing have been implemented with local public and private stakeholders. Partners has approved a strategic agreement and action plan to further implement the governance of the system	Stakeholder resistance; Unskilled Personnel; Standardized procedures	▪ Involvement of local actors since the "designing" phase, taking into consideration their actual need and capability. ▪ Start from the understand of the real benefit that users can get from tools.
DIGITALIZATION AND DATA SHARING	The project developed a joint methodology, taxonomies and data models useful to the interoperability of data. Starting from the data available in the web portals of 4 destinations (Tuscany, Nice Cote d'Azur, Liguria and Sardinia), Smart Destination created a unique data lake. The data have been integrated also with data owned by private operators. The project developed SMART MONIT and SMART TOUR as demos. The first tool is a dashboard useful to showcase and monitor relevant data for the destinations; the second one is an app that using sharing data promote cross-regional destinations.	Stakeholder resistance; Unskilled Personnel; Standardized procedures	▪ To design and develop "organisation" behind the web tools and not just technological aspects - In case of "digitisation" and data sharing it is relevant the "organisation" that support the ICT tool. ▪ Involvement of Local actors since the "designing" phase, taking into consideration their actual need and capability.

			▪ To disseminate and lead to understand the real benefit can get from digitalization.
GREENING TOURISM DESTINATION			
COVID 19 AND CRISIS MANAGEMENT			

PROJECT TITLE	SMARTMED
	The main object is to develop the Mediterranean as an attractive, smart and inclusive destination. The SMARTMED project will face key challenges for the Mediterranean region in the development of smart, inclusive and sustainable tourism, primarily high seasonality and lack of cooperation of key actors in the sector.
	The main result of the project is a new business model of SMART tourism which will be developed through the project based on analyses, stakeholder consultations, testing through pilot projects and increasing stakeholder capacity to implement pilot projects, and the knowledge gained in the project will be transferred and capitalized Union in the form of an e-learning platform and recommendations for the development of future policies so that it can be used within the future multiannual financial framework in the period 2021-2027.

PROGRAMME	Interreg-MED
TYPE OF PROJECT	Strategic Project

KEY ISSUES	EXPERIENCES, RESULTS, DELIVERABLE, SOLUTIONS	GAPS	GROWTH OPPORTUNITIES
GOVERNANCE		▪ Unskilled Personnel ▪ Lack of technological tools/solutions ▪ Rigidity of the regulatory system ▪ Stakeholder resistance; ▪ Targeting the right stakeholders	▪ Presentation of the program results and best case practises to local community groups and other local stakeholders to improve interest in the governance matters ▪ Cooperation with other network organizations and European Institutions in the involvement of other stakeholder in order to encourage the participation ▪ Availability of different experiences in involvement activity: focus group and educational event
DIGITALIZATION AND DATA SHARING	SMART TOURISM BUSINESS MODEL focusing, among other issues, in the up/re-skilling tourism work force with a focus on innovation/digitalisation and the exploitation of digital innovation in tourism.	▪ Stakeholder resistance; ▪ Lack of technological tools/solutions ▪ Unskilled Personnel; ▪ Standardized procedures; ▪ Rigidity of the regulatory system;	▪ Availability of a model in the up/re-skilling tourism work force with a focus on innovation and digitalisation ▪ Sharing information through social media or on an organization's website

	Digital literacy for employees in tourism **Web tools** to promote place as a destination based on interaction and digital experience of visitors**.** **Destinations are connected by digital platforms**		▪ Disseminate through organization's website data ▪ Reduce administrative burden ▪ National recovery plans include actions and measures for digitalization ▪ Focus on usability of the gathered data to explain the function in tourism field ▪ On line advertising and augmented reality experience
GREENING TOURISM DESTINATION	**Involvement in Glasgow Declaration Climate Action in Tourism** **Involvement of EC Tourism Transition Pathway process and the work of the Future of Tourism Coalition**	▪ Stakeholder resistance ▪ Lack of technological tools/solutions ▪ Standardized procedures; ▪ Difficulties in collection of data ▪ Rigidity of the regulatory system ▪ Targeting the right stakeholders	▪ Availability of projects, methodologies, studies and guide lines on sustainability in Tourism ▪ Presenting program results to local community groups and other local stakeholder ▪ National recovery plans include actions and measures for green transition
COVID 19 AND CRISIS MANAGEMENT	**Studies at national or European level**		▪ Availability of different studies and guidelines at national and European level

PROJECT TITLE	SUSTAINABLE TOURISM COMMUNITY
	The Sustainable Tourism Community is the INTERREG MED horizontal project responsible for studying, testing, capitalising innovative instruments and actions towards the enhancement of tourism sustainability in the Mediterranean through the community of 30 modular projects gathering 200+ organisations. All the projects belong to the MED programme's priority axis 3 "Natural & Cultural resources – Protecting and promoting Mediterranean natural and cultural resources" and to the specific objective 3.1 "To enhance the development of sustainable policies for more efficient valorisation of natural resources and cultural heritage in coastal and adjacent maritime areas of a sustainable and responsible coastal and maritime tourism in the MED Area".

PROGRAMME	Interreg-MED
TYPE OF PROJECT	Horizontal Project

KEY ISSUES	EXPERIENCES, RESULTS, DELIVERABLE, SOLUTIONS	GAPS	GROWTH OPPORTUNITIES
GOVERNANCE			▪ Encourage bilateral meetings, staff exchange, try-outs
DIGITALIZATION AND DATA SHARING		▪ Stakeholder resistance; ▪ Unskilled Personnel; ▪ Standardized procedures; ▪ Rigidity of the regulatory system; ▪ Lack of technological tools/solutions	▪ Several COSME projects are being launched now with digitalization and tourism SMEs in mind.
GREENING TOURISM DESTINATION	The Sustainable Tourism community supervises 30 modular projects directly related to a greener tourism. Catalogue of the project https://sustainable-tourism.interreg-med.eu/catalogue-of-projects-outputs-and-policy-targets/	▪ Stakeholder resistance; ▪ Lack of financial resources; ▪ Lack of time ▪ Unskilled Personnel; ▪ Lack of financial resources; ▪ COVID lead on other priority	▪ Availability of tools, best practises and experiences on the key issue
COVID 19 AND CRISIS MANAGEMENT			

PROJECT TITLE	*WINTER MED*
	It promotes the transition from the 3S (Sea-Sun-Sand) tourism of insular tourist destinations during the summer to an alternative, sustainable, all-year round use of these territories, by delivering the tools for changing and upgrading one of the key sectors of the Mediterranean area.
	The main objective of the project is to implement integrated transnational strategies for the development of all year round sustainable and responsible tourism in Mediterranean island destinations, through joint planning and cooperation between involved regions.
PROGRAMME	**Interreg - MED**
TYPE OF PROJECT	Capitalisation Project + Pilot Project

KEY ISSUES	EXPERIENCES, RESULTS, DELIVERABLE, SOLUTIONS	GAPS	GROWTH OPPORTUNITIES
GOVERNANCE	**WINTERMED TRANSNATIONAL STRATEGY** https://winter-med.interreg-med.eu/index.php?id=13932&L=0 **Regional and National Action Plans (Tuscany, Cyprus, Corse, Balearic Islands, Dubrovnik-Neretva)**: https://winter-med.interreg-med.eu/index.php?id=13931&L=0 **WINTERMED TOOLBOX** https://winter-med.interreg-med.eu/what-we-do/winter-med-toolbox/	▪ Lack of financial resources; ▪ Rigidity of the regulatory system; ▪ Lack of technological tools/solutions	▪ Stakeholders' engagement through participatory processes. ▪ Implementation of knowledge management systems to spread good practices and to foster key information
DIGITALIZATION AND DATA SHARING	**SOFTWARE DEVELOPMENT KIT** The project capitalised the results of SMART DESTINATION PROJECT. SMART DESTINATION supported and relaunched the competitiveness of the transnational tourism supply chains by launching a process of integration of information flows and databases currently available to the public-private system with the territorial tourism offer. The good practice provides an example of construction of a cross-border digital tourist ecosystem, replicable in other areas of the Med.	▪ Stakeholder resistance; ▪ Unskilled Personnel; ▪ Lack of technological tools/solutions ▪ Standardized procedures.	▪ Opportunity to formulate and implement a joint plan for the professional development of talents in the tourism sector, as a capacity building strategy that enhances its value chain, from the tactical and strategic spheres.
GREENING TOURISM DESTINATION	**WINTERMED TOOLBOX** https://winter-med.interreg-med.eu/what-we-do/winter-med-toolbox/	▪ Unskilled Personnel;	▪ Opportunity to formulate and implement a joint plan for the professional development of talents in the

			tourism sector, as a capacity building strategy that enhances its value chain, from the tactical and strategic spheres. ▪ Create and reinforce a transnational ecosystem fostering R&D, exchange of knowledge, finding synergies, best practices.
COVID 19 AND CRISIS MANAGEMENT			

OTHER INITIATIVES	NECSTour		
	The aim of the network is to help members deliver the tourism of tomorrow, NECSTouR provides an interregional cooperation strategy focused on the five key strategic approaches, known as the "Five S of sustainable tourism of Tomorrow": Smart destinations, Sociocultural balance, Skills and talent, Safety and resilience, Statistics and measurability. These are complemented by two cross-cutting initiatives: The Barcelona Declaration "Better Places to Live, Better Places to Visit" and the Smart Specialisation Platform "Digitalisation and Safety for Tourism".		
PROGRAMME	n/a		
TYPE OF INITIATIVE	Network		
KEY ISSUES	EXPERIENCES, RESULTS, DELIVERABLE, SOLUTIONS	GAPS	GROWTH OPPORTUNITIES
GOVERNANCE	**NECSTouR is a network of 40** regions, each member is either directly the Regional DMO or the tourism department in the regional authority. Plus some local DMO as associated members. https://necstour.eu/members **The Tourism of Tomorrow Lab** have been integrated as a proposed investment project into the core business of NECSTouR. The goal is to target the management of sustainability, the integration big data sources in destination management and to check the coherence of official statistics.		
DIGITALIZATION AND DATA SHARING	**Digitalisation and Safety for Tourism** https://s3platform-legacy.jrc.ec.europa.eu/tourism **The Tourism of Tomorrow Lab**		▪ Access to data, for the benefit of both public and private regional tourism stakeholders.
GREENING TOURISM DESTINATION	**Glasgow Declaration** Engagement of the members and engaging our members to develop Climate Action Plan and connect the Glasgow pathways with the European Green Deal and Tourism Agenda.		
COVID 19 AND CRISIS MANAGEMENT	**Study on "Regional impacts of the COVID-19 crisis on the tourist sector"** The study assesses how different tourist regions are affected by COVID-19 and potential future developments. **https://necstour.eu/publications/dg-regio-study-region-covid-tourism**		

OTHER INITIATIVES	NATIONAL AND REGIONAL EXPERIENCES *Hereby some national and regional experiences during pandemic. Organisations have investigated different solutions to improve operational tools for Governance, Digitalization and Greening Tourism in order to face COVID 19 crisis.*		
PROGRAMME	Not relevant		
KEY ISSUES	EXPERIENCES, RESULTS, DELIVERABLE, SOLUTIONS	GAPS	GROWTH OPPORTUNITIES
GOVERNANCE	**Strengthening the governance.** Many destinations elaborate management plant enhancing participatory processes **Plans** Master and strategic tourism plans; Tourism promotion strategy; Plans for the Enhancement of cooperation among main tourism actors; Plans for the Strengthening of management and governance skills of tourism actors (at national and regional levels) **Cooperation** Links and connections among lead destinations (Slovenian tourism 35 organizations on national level)	▪ Stakeholder resistance; ▪ Rigidity of the regulatory system	▪ Organization by webinar to enhance participation ▪ Use platform and other web site already available to involve and disseminate
DIGITALIZATION AND DATA SHARING	**Regional Destination Management System Deskline 3.0 powered by Feratel** Tool which is to be used free by the local destinations and their enterprises. (Veneto Region) **Veneto Region Federal Observatory** A smart dashboard with main data at different level: national, regional, local and by destination. (Veneto Region)	▪ Stakeholder resistance; ▪ Lack of financial resources	▪ Use existing tools to persuade stakeholders and operator in know and use data for their activity

GREENING TOURISM DESTINATION	GSTC CERTIFICATION is an international body created by the United Nations Environment Program and the United Nations World Tourism Organization, to promote sustainability and social responsibility. The GSTC has created two types of certifications both shaped on the needs of the tourism sector: hotel and tour operators and destination	▪ Stakeholder resistance; ▪ Rigidity of the regulatory system	▪ Availability of operative tools and a define process to obtain certification ▪ Improvement of learning activity
COVID 19 AND CRISIS MANAGEMENT			▪ Higher interest of locals and for exploration of unknown destinations ▪ More possibilities to change

FOCUS ON STUDIES ON IMPACT OF THE COVID-19

Impact of the Covid-19 in the first place (2020) and the support needs of the regions to relaunch tourism in a sustainable way (2021).
CPMR among its Mediterranean member regions
https://cpmr-intermed.org/download/study-on-the-impacts-of-covid-19-and-adaptation-measures-on-the-tourism-sector/

Results of the second part of the study
Impact of the Covid-19 in the first place (2020) and the support needs of the regions to relaunch tourism in a sustainable way (2021).
(not public at the moment, although a brief presentation of initial findings can be consulted)
https://cpmr-intermed.org/download/conclusions-task-force-culture-and-sustainable-tourism-16-july-2021/?wpdmdl=13321&ind=1636012935359

Intermediterranean Commission Final Declaration 2021 "15 key recommendations for the Future of the Mediterranean basin in a post-pandemic era"
CPMR
https://cpmr-intermed.org/download/final-declaration-2021-of-the-intermediterranean-commission/?wpdmdl=12751&ind=1626348618779

Handbook on shared methods and tools for relaunching a sustainable post COVID-19 tourism model (to be published soon)
CPMR and UfM

Covid 19 – Studies in Andalusia
https://www.andalucia.org/es/informes-covid

FOCUS ON APP IN RESPONSE TO COVID19 CRISIS

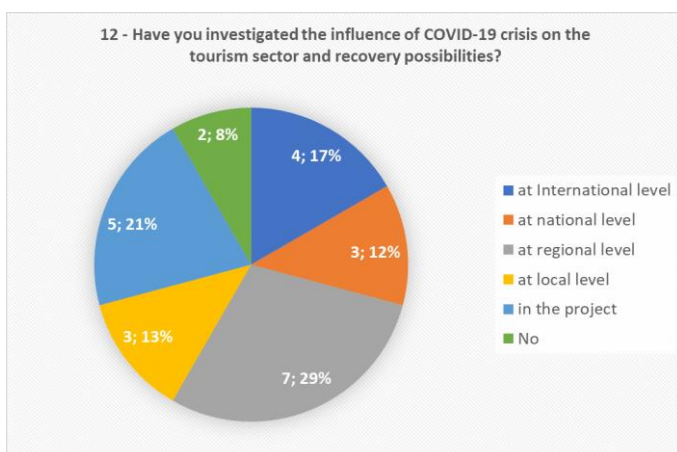|	
YOUFLANDERS MOBILE APP RESPONSE TO COVID-19 CRISIS	YouFlanders Mobile App has the objective of giving the visitor the right instruments to visit the region during the pandemic by helping them identify alternative tourism experiences. The app is not only aimed at visitors, it is also a tool to help local businesses get information and to develop their activities accordingly.

4.2 IMPACT AND CHALLENGES IN THE TOURISM SECTOR DUE TO THE COVID-19 PANDEMIC

The impact and challenges of the Covid-19 pandemic on maritime and coastal tourism were illustrated in the previous chapter using statistical data and recommendations from the KPP and other papers. In this section, we present the opinions that emerged from the survey carried out by Panoramed. The documents suggested by the respondents were also used.

SOURCE: PANORAMED SURVEY 2022

The survey highlighted that public entities paid great attention to the effects of the Covid-19 pandemic on tourism.

Only two respondents stated that they had not investigated the effects of the pandemic on tourism. Among those who responded positively, most carried out surveys or studies in their field of competence (governance level or project), although in some cases the studies covered different governance levels.

Therefore, the multiplicity of viewpoints reveals the complexity of the effects of the pandemic.

The studies proposed by the respondents contain two typologies of information: statistical data on the 2021 recovery after the dramatic decrease in 2020 and qualitative data.

Statistical data confirm that 2021 was a year of recovery. However, the continuing decline in tourism has not been affected solely by restrictions imposed by various levels of government (from local to national) but also by changes in tourist behaviour[32]. Because of these changes, the decline has been particularly severe for destinations that depend on air connections and short-term travel. In fact, many coastal regions with strong domestic markets and rural tourism regions were less severely affected by the pandemic, because the mistrust of air travel has favoured tourist destinations that are reachable from the reference markets by other means of transport[33].

In line with the above, the recommendations approved at the General Assembly of the "CPMR Intermediterranean Commission" are coherent with the guidelines identified in the KPP. In particular, the Final Declaration "*Recalls that multi-level governance – albeit complex – ensures that public policies at Mediterranean, European and national scales answer territorial needs reflected through the voice, management, and decisions of local and regional authorities on the one hand*" and "*Recommends that the role of local-and-regional-authorities-networks be fully acknowledged by European and Mediterranean institutions and stakeholders, in their capacities to support decentralization, the integration and mainstreaming of policies and funds at various*

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[32] Regional impacts of the COVID-19 crisis on the tourist sector - Final Report
https://osservatorioturismoveneto.it/
http://www.irpet.it/archives/58357
[33] European Travel Commission, 2020b

governance levels throughout the Mediterranean"[34]. Therefore, we can confirm that governance possesses a strategic role for tourism.
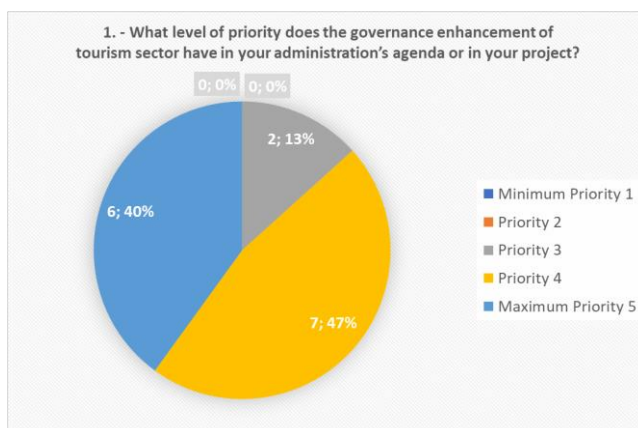
For the purposes of Panoramed GGOR update, it would be useful to examine more deeply the qualitative information and opinions provided.

Two different views were expressed by respondents. On one hand, there is a strong concern that the pandemic may generate the desire to slow down tourism innovation. In this regard, there is a "great illusion" among public entities and private stakeholders that tourism will soon return to the levels of 2019 and that there is no reason to change tourism models. On the other hand, some respondents believe tourists are interested in exploring unknown destinations. In this view, there are opportunities for change in destinations and in demand, like developing ecotourism in protected areas. This new demand is conditioned by concerns related to the pandemic. Tourists are more cautious and careful and are seeking increased safety and distance, meaning they want to avoid overcrowded areas and keep other people at a greater distance.

As it has often been said, crises are both a risk and an opportunity for change. Thus, we can assume both opinions are valid. That is to say, on one hand, there is the risk that stakeholders seek established tourist models; and on the other hand, there is a new demand for safety and change that stakeholders can embrace by significantly modifying the governance of tourism and behaviours.

4.3 FOCUS ON TOURISM GOVERNANCE

Governance is the main issue for coastal and maritime tourism, according to Panoramed partners. As reported in chapter one, the KPP identified objectives and recommendations for improving governance in the tourism sector[35]. In this section, we report the opinions and suggestions collected in the Panoramed survey.

Governance is a relevant issue for most respondents; in fact, no respondent selected priorities 1 or 2, the least important. However, there is still a fair amount of variability in the degree of importance devoted to this subject.

Organizations operating at a regional or local level expressed less interest in this subject, selecting values 3 and 4, whereas national and international organisations consider the issue of governance more important.

In some cases, this lower interest can be explained by the organisation of tourism, especially in smaller countries, where tourism management is more centralized. In larger countries, where tourism is mainly managed at the regional level, it should be of the highest priority.

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[34] Final Declaration CPMR Intermediterranean Commission General - Assembly, 15 key recommendations for the Future of the Mediterranean basin in a post-pandemic era, 9 July 2021
[35] Chapter 1, paragraph "Are the "main issues" of KPP still relevant?"

According to some respondents, governance is definitely a key factor for innovation in tourism, as stated in the KPP. However, they believe that creating a network for governance can be achieved gradually. For example, stakeholders are focused on establishing local tourism management organisations by creating data sharing systems. Therefore, a lower priority is the result of a need to build the stakeholder network over a longer period of time.

4.3.1 The role of DMOs

The concept of DMO was illustrated in the first chapter. Respondents were given a summary sheet explaining the broad meaning of this term in international literature and were asked to respond, taking into account that the DMOs can act at all government levels and consist of a network of public and/or private stakeholders.

2. - Are there DMOs in your country (at local, regional or national level) involved in the tourism governance model or in your project?

- Yes at national level
- Yes at regional level
- Yes at local level
- Yes in the project
- No

According to this concept, the governance issue is closely related to the matter of DMOs, which possess the operational tools necessary to achieve the objectives. Some inconsistencies in the answers reveal the lack of a "shared vocabulary" on this topic that would be the basis for building common strategies at a Mediterranean-wide level.
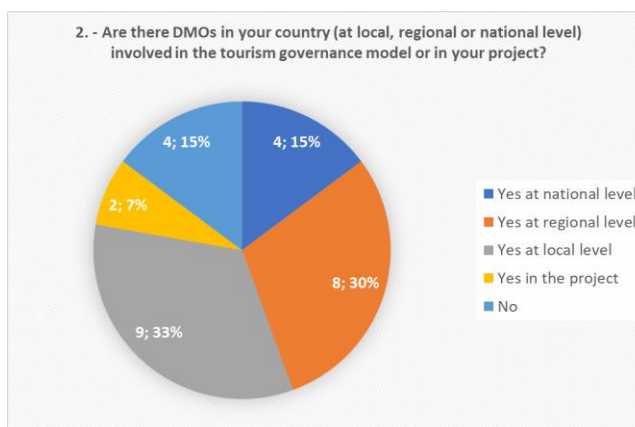
Having said this, it can be noted that the stakeholder networks are present in Mediterranean countries at all levels of government. The model of governance based on the networks has therefore been implemented in the Mediterranean countries.

In some cases, the tourism management model involves all levels of government (national, regional and local), but more often we find the regions in the middle of the management system.

In many cases (9 respondents), the DMO is active at only one level of government. Taking into account what was explained in chapter one, the integration of management at all levels of government is necessary to achieve the most important objectives (sustainable tourism). Therefore, this is a weakness of the system that should be addressed.

After analysing in detail the DMOs proposed by the respondents, we found that they mentioned two different types consistent with international terminology. In fact, the term DMO has a dual meaning: "Destination **Management** Organisation" and "Destination **Marketing** Organisation"[36]. The dual meaning of the term may be confusing. It must be made clear that in order to have an efficient marketing organization it is necessary to have an equally efficient management organisation. Therefore, the main issue derives from **management** in both cases.

Furthermore, we can find DMOs at all levels of governance: national, regional and local. In addition, there are international networks of DMOs. NECSTouR, for example, is a network of 40 regions, whose members are either Regional DMOs or the tourism department of regional authorities, plus a few local DMOs.
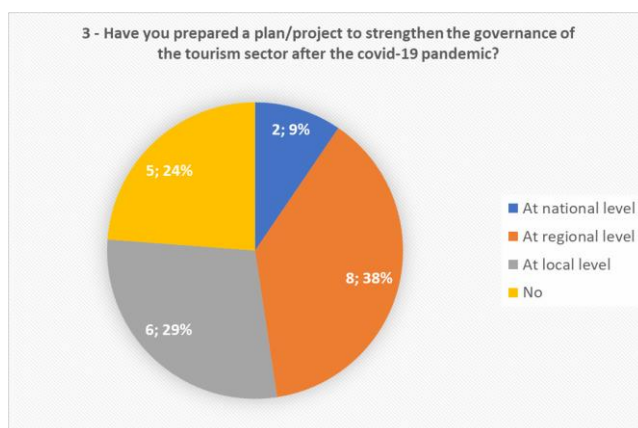
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[36] See the paragraph "Building a Shared Vocabulary" above

4.3.2 Plans and projects to address the pandemic

The Covid-19 pandemic has created serious challenges for the tourism industry. The industry has been particularly weak in dealing with external crises, more so than internal crises, as illustrated above.

The panel of respondents addressed the crisis by developing several governance tools:

- Master and strategic tourism plans;
- Tourism promotion strategies;
- Plans to restore travellers' confidence and stimulate demand after the COVID-19 crisis;
- Plans to enhance cooperation among the main individuals affected by tourism;
- Plans to strengthen the management and governance skills of aforementioned individuals;
- Foundation of Mediterranean Ecotourism Consortium – a key working group for ecotourism governance.

Five respondents reported that no plan was drawn up. The reason for this choice is related to the emergency situation and the need to address it with business support tools and other emergency measures.

The point of this document is not to summarise the plans of each respondent, and it would be impossible to account for so many different methods and proposals[37].

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[37] For more information:

Veneto Region:
https://www.slea.it/pstv/

NECSTOUR:
https://necstour.eu/public-news/necstour-calls-transforming-sustainable-destination-through-data-sharing-and
https://necstour.eu/public-news/necstour-and-tourism-manifestos-position-commissions-proposals-intra-eu-and
https://necstour.eu/public-news/necstour-outlines-pathway-commitment-action-20th-european-tourism-forum

WINTER MED Transnational Strategy:
https://winter-med.interreg-med.eu/index.php?id=13932&L=0
Regional and National Action Plans (Tuscany, Cyprus, Corse, Balearic Islands, Dubrovnik-Neretva):
https://winter-med.interreg-med.eu/index.php?id=13931&L=0

National resilience and recovery plan 2021-2026 - chapter dedicated to tourism on page 416:
https://planoporavka.gov.hr/UserDocsImages/dokumenti/Plan%20oporavka%20i%20otpornosti%2C%20srpanj%202021..pdf?vel=13435491

"Tourism for all" programme was created to boost demand and extend the tourism season by financing domestic tourism on the basis of income criteria:
- Special section dedicated to COVID – 19, providing travellers with information and instructions: www.visitgreece.gr
- Destination Greece Health First: https://greecehealthfirst.gr/

Tuscany Region:
- http://www.toscanapromozione.it/content/67/Piano-Operativo-2021

However, we can see that all the plans address the crisis by particularly focusing on new tourism models for coastal destinations, including heritage, naturalistic and food and wine tourism, to name a few, which are considered strategic in overcoming the decrease in arrivals and overnight stays. In addition, building systems for collecting and sharing data is considered a necessary aspect of tourism governance and essential for implementing specific policies.

Providing economic resources and planning future action helped tackle the crisis caused by the Covid-19 pandemic. However, no one reported having crisis-management plans with previously prepared tools. In dealing with crises in general – not just the pandemic – it would be more effective to have tools already in place.

The GGOR update, as mentioned above, is intended to provide tools for tourism management. For this reason, respondents were asked to indicate best practices for managing the destination.

The proposed best practices, although very different from each other, focus on two elements: participatory programming and data sharing. The involvement of stakeholders is a central factor both in the data collection phase and in the programming phase. It can therefore be said that the issue of governance is closely linked to the creation of collaborative networks at all levels of governance.

Best practices identified by respondents address several issues at the same time: knowledge-driven programming, the creation of new tourism products and sustainable destination management. This means that they are part of a single governance process.

The following table reports the suggestions made by the respondents

TOOLBOX FOR TOURISM GOVERNANCE
The Veneto Region has developed tourism management plans for local DMOs, and the Regional Tourism Strategic Plan has been updated with a participatory process[38]. As an example, we suggest the project **"Vivere le Dolomiti"** by the Dolomiti-Belluno DMO**.**
The **Tourism of Tomorrow Lab** has been integrated as a proposed investment project into the core business of NECSTouR. The goal is to target sustainability management, integrate big data sources into destination management and check the coherence of official statistics.
The **Mediterranean Ecotourism Consortium** will [39]   1. **Create a cross-sectoral working group on Ecotourism at a Mediterranean level;**   2. **Improve the governance of ecotourism in the basin with a bottom-up approach;**   3. **Monitor and provide training, data and tools to manage, measure, and promote ecotourism;**   4. **Advocate for ecotourism integrated strategies at all levels.**
MITOMED+ M&C Management Model can be used by maritime and coastal tourism destinations to ensure tourism sustainability and gain a competitive advantage, increasing the benefits tourism brings to the territory and the local community through a series of recommendations, tools and practices based on the work done and results of MITOMED+

- https://team.toscanapromozione.it/
- https://team.toscanapromozione.it/wp-content/uploads/2019/12/Linee-guida-per-ambiti-e-PTO.pdf
- https://www.fondazionesistematoscana.it/toscana-rinascimento-senza-fine-nel-segno-della-ripartenza/

[38] For more information visit the website: https://www.slea.it/pstv/
[39] For more information visit the website: https://www.iucn.org/regions/mediterranean/projects/current-projects/destimed-plus-interreg-med-towards-a-mediterranean-ecotourism-consortium

project, the CPMR-IMC and NECSTouR policy work and the Interreg MED Sustainable Tourism Community results, among others[40].

Best practices involving residents and local communities in tourism planning: Catalonia's regional government requested public consultation from the general public in order to collect citizens' input before drafting the new **Tourism regional law**[41].

The project Herit-Data has created an **ICT umbrella platform,** which encompasses six pilot platforms:

Dubrovnik; Florence; Mostar; Pont du Gard; Valencia; West Greece[42].

The indicators system developed by Herit-Data project, based on big data and open source, will provide DMOs and Tourism Boards with quick and accurate information about visitor behaviour and how the flow of tourists affects the state of conservation of a specific site. Through the **Snap4city platform** provided by the DISIT (Distributed Systems and Internet Technologies) Lab of the University of Florence (project partner), destination dashboards were developed for 6 pilot sites. Further information is available on the project website.

BESTMED Med S&C Path Model. The model aims to achieve integrated planning and management of cultural routes in Mediterranean destinations based on sustainability principles. The model helps enhance the governance of routes and paths by allowing greater levels of cooperation between regional authorities, the managers of cultural routes/paths and other key stakeholders in the territory.

In addition, the establishment of a Mediterranean **Network of Sustainable Tourism Observatories** within the BESTMED project, by bringing together data collection and data management entities and facilitating the connection between experts on sustainable tourism, can help enhance participatory, knowledge-based and multilevel planning.

The main function of the online platform is the self-assessment form for managers of cultural routes, which enables monitoring of sustainable practices. The self-assessment form consists of four main categories, all revolving around sustainability: sustainable management, economic sustainability, socio-cultural sustainability and environmental sustainability.

The strategy of the **Tuscany Region** in innovative tools for tourism governance includes:
- **Destination management system (DMS)** at regional level. The DMS is a web tool that connects all the local IAT (information offices) as well as the public and private operators to share data, co-create news and information, manage contacts, launch surveys etc – see https://make.visittuscany.com/. The information for the digital promotion of the destination are edited on the web portal www.visittuscany.com
- **Tuscany Together** is a web system used to co-create the annual tourism promotional plan at regional level, by involving local DMOs (ambiti turistici - association of municipalities - and the Tourism Product PTO recognised by regional law n. 86/2016).
- **Smart Destination Project** was an opportunity to test the methodology for interoperability and data sharing.
- **Digital Tourism Observatory. Based on a datalake from different sources (open or private ones)**, it integrates them and implements KPIs and dashboards to offer an overview of the tourism sector at a regional level.

SmartData is a tool of the Regional Ministry of Tourism of Andalusia for tourism data management used to:[43]
- **Assist and orient the tourism industry and DMOs in decision-making processes;**

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[40] For more information visit the website: https://mitomed-plus.interreg-med.eu/index.php?id=11112
[41] For more information visit the website https://participa.gencat.cat/processes/lleiturisme?locale=es
[42] For more information visit the website:
https://www.snap4city.org/dashboardSmartCity/view/index.php?iddasboard=MzExNQ==
[43] For more information visit the website: https://smartdata.andalucia.org/

- **Make the data accessible and user-friendly no matter the technical qualification of the employees or the technological infrastructure;**
- **Supplement official statistics, including non-official data of special interest for the tourism sector;**
- **Promote the use of data in the tourism sector.**

DATAESTUR is a selection of the most significant Spanish tourism data for consultation and study. Presentation of the main sources of information and results are constantly being expanded and improved[44].

Smart Destinations Network is aimed at leading tourism sector development through innovation and technology, always with sustainability at the forefront. These destinations are linked together via the Smart Destination Network in order to promote synergies and the transfer of knowledge, thus maximising the benefits of this methodology.
The Spanish Secretariat of State for Tourism and SEGITTUR jointly coordinate the Smart Destinations Network, which provides advice on how the methodology can be applied and promotes the exchange of experience and best practices among its members.[45]

4.4 FOCUS ON DIGITALISATION

The digitalisation of the tourism industry covers many areas.

It may involve tourist information and promotion, such as the digitisation of content (for example, transferring archival images to digital media); sharing tourist information through digital platforms (websites, e-mail, social media, etc.); promotional campaigns through the web; etc.
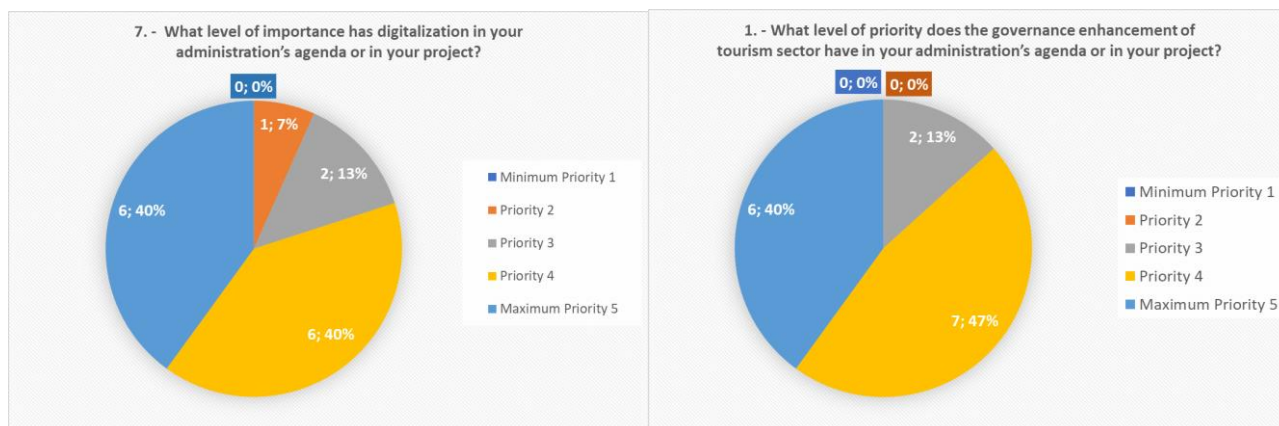
However, in the PANORAMED project, digitalization focuses on the **lack of comparable statistical data**, from basic data on tourist flows and guest profiles to destination management and tourism governance indicators. The goal of digitalisation therefore is **data management** and analytical capabilities, with the goal of creating opportunities for collaboration between different stakeholders, also considering the new needs of destination management that arose following COVID-19.

The harmonisation of data collection systems helps develop new research methodologies and models, data sharing and the transfer of knowledge to better exploit tourism resources.

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[44] For more information visit the website: https://www.dataestur.es/en/
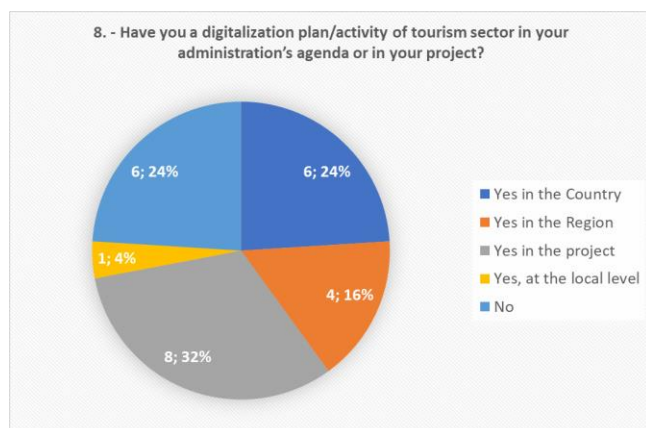[45] For more information visit the website: https://www.segittur.es/en/

The digitalisation of data and data sharing are two of the major challenges tourism faces at all levels of governance, from local to international. The following graphs compare the responses

of our experts on the two main issues for the development of maritime and coastal tourism: governance and digitalisation[46].

The replies to the two questions are almost identical. In some cases, digitalization is considered more important, in others, the opposite is true. However, those who gave importance to the first item also gave importance to the second.

Knowledge-driven tourist destination management is the main goal of all case studies that have been proposed by respondents.

The significant focus on digitalisation does not correspond to the implementation of action for this objective. Six respondents don't have plans to digitalize data. The main problem, however, is the lack of integration at different levels of governance. In fact, the graph highlights the presence of digitization projects operating at different levels of governance, but only in one case did action involve all levels.

In fact, even while drafting this paper, the difficulty in carrying out statistical analyses that cover all the countries involved in the PANORAMED project emerged. The simplest data (arrivals and overnight stays) is available on the platforms at different times for each national statistical institute.
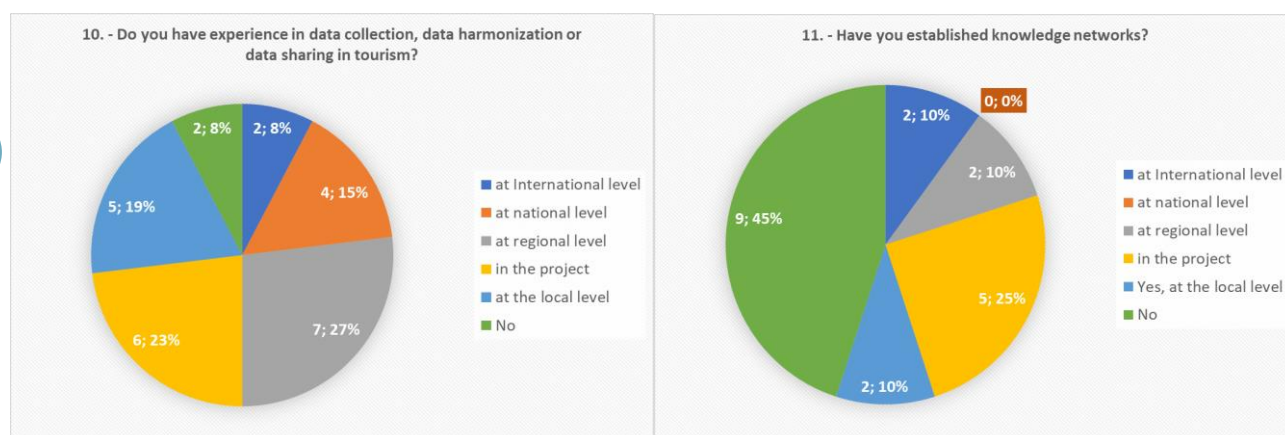
Knowledge-driven planning and management needs, in today's world, include both a variety of information required (not only quantitative but also qualitative data) and their availability in real time.

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[46] These are probably two issues that affect the tourism sector worldwide

There is a very wide gap between the needs of data sharing and their actual availability. Although important projects are underway to explore procedures and tools for data sharing, the goal of creating a unified platform at the level of Mediterranean destinations is still a long way off, often also at a regional level.

Indeed, digitalization is still in its experimental phase. Many tourism experts have no experience in creating networks at a national or international level, even within our sample. This experience exists mainly within individual organizations or projects. A widespread network of data sharing still needs to be built.

As mentioned above, there are many best practices regarding the digitalisation of coastal tourism. In particular, we can look at two MED strategic projects: SMARTMED and BEST MED.

All respondents are aware that this is a strategic issue. Particularly for European partners, there are projects in the National Recovery and Resilience Plans of every country that aim to create platforms for data sharing involving all tourism stakeholders.
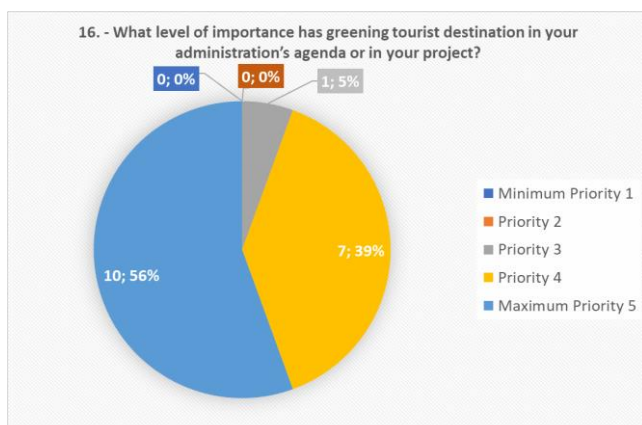
4.5 FOCUS ON GREENER TOURIST DESTINATIONS

The topic of greener tourist destinations, as mentioned in the first chapter, has been divided into three objectives: improving and protecting the tourism ecosystem, reducing pressure and implementing climate-change adaptation measures and adding value to protected cultural, traditional and natural heritage.

This is one of the "key issues" of PANORAMED[47] and should become the main mission for the development of coastal and maritime tourism in the Mediterranean.

The methodology used for the drafting of the GGOR (i.e., a survey between partners and other tourism stakeholders), has identified the key strengths and weaknesses, as well as different approaches to governance. In this way we have avoided to overlap with the report carried out by the HPs who have prepared a catalogue of the results of the projects.[48]
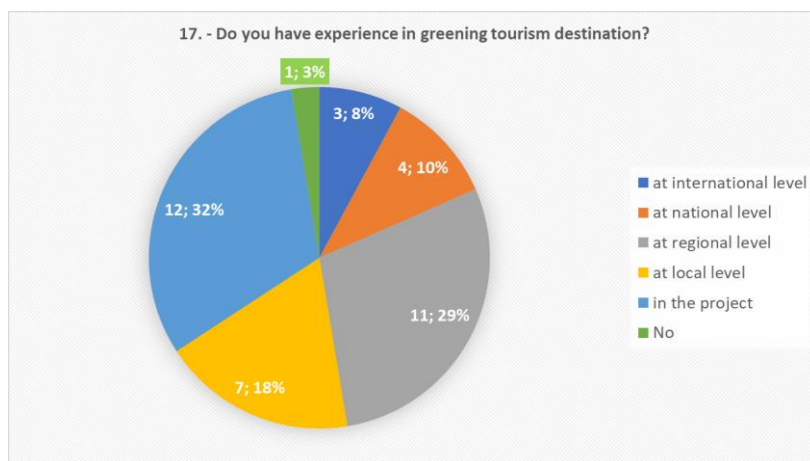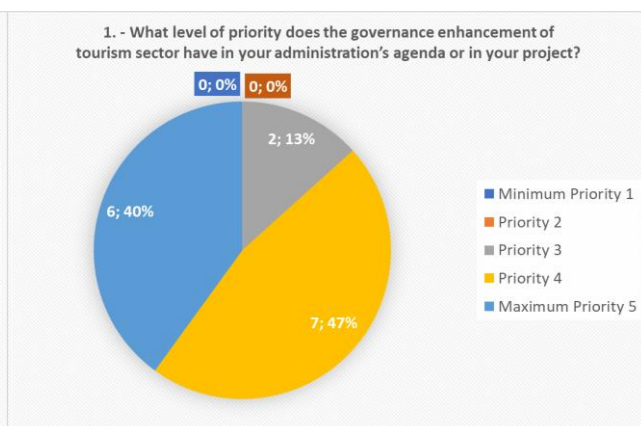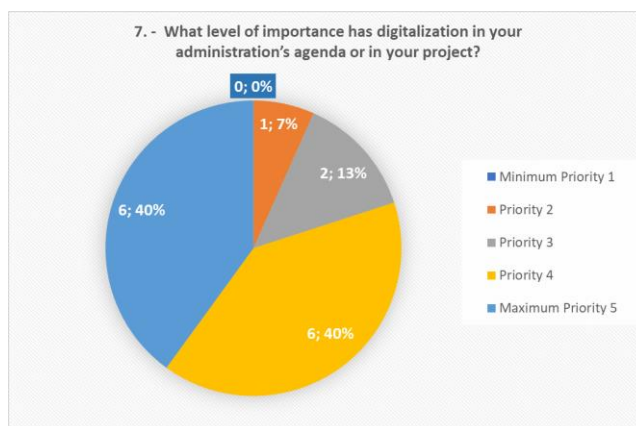
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[47] Key Policy Paper
[48] Capitalization activity is available online and in particular the tools implemented in the projects: https://sustainable-tourism.interreg-med.eu/catalogue-of-projects-outputs-and-policy-targets/

16. - What level of importance has greening tourist destination in your administration's agenda or in your project?

0; 0% 0; 0% 1; 5%
10; 56%
7; 39%

- Minimum Priority 1
- Priority 2
- Priority 3
- Priority 4
- Maximum Priority 5

The respondents confirm the importance of this topic. Most gave the issue "priority 5", and one gave it "priority 3." If you compare this to the other key issues, this one received more attention.

Therefore, the goal is clear to everyone. There is a difference between the first two key issues and the third. In fact, the first two are tools to reach the final goal: a greener coastal and maritime tourist destination.

7. - What level of importance has digitalization in your administration's agenda or in your project?

0; 0%
1; 7%
2; 13%
6; 40%
6; 40%

- Minimum Priority 1
- Priority 2
- Priority 3
- Priority 4
- Maximum Priority 5

1. - What level of priority does the governance enhancement of tourism sector have in your administration's agenda or in your project?

0; 0% 0; 0%
2; 13%
6; 40%
7; 47%

- Minimum Priority 1
- Priority 2
- Priority 3
- Priority 4
- Maximum Priority 5

17. - Do you have experience in greening tourism destination?

1; 3%
3; 8%
4; 10%
12; 32%
11; 29%
7; 18%

- at international level
- at national level
- at regional level
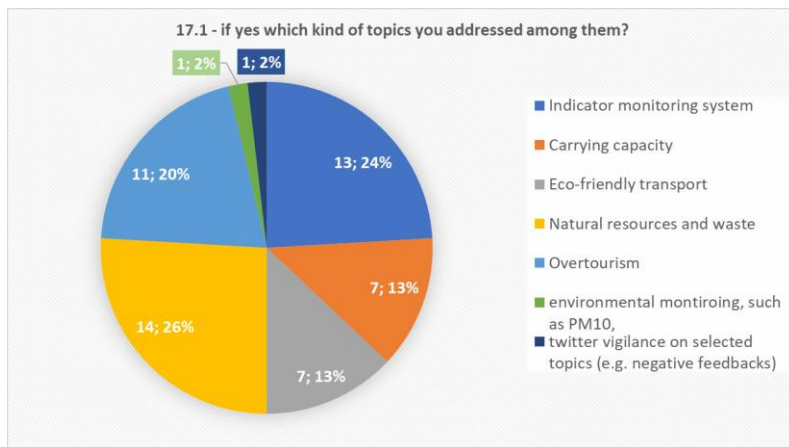- at local level
- in the project
- No

The respondents have extensive experience on this topic. The issue has been explored at all governance levels.

It should also be noted that many experiences are related to European interregional cooperation projects. Therefore, most respondents have international expertise.

Many experiences of respondents are related to the issues we have already outlined. In particular, the indicator monitoring, environmental monitoring, twitter vigilance and carrying capacity involve the creation of a digital platform.

17.1 - if yes which kind of topics you addressed among them?

- Indicator monitoring system
- Carrying capacity
- Eco-friendly transport
- Natural resources and waste
- Overtourism
- environmental montiroing, such as PM10,
- twitter vigilance on selected topics (e.g. negative feedbacks)

Experiences of waste management and overtourism hold particular importance. In fact, these are two problems common to coastal destinations that are very difficult to deal with. The details of outputs are given above in the summary sheets of each project.
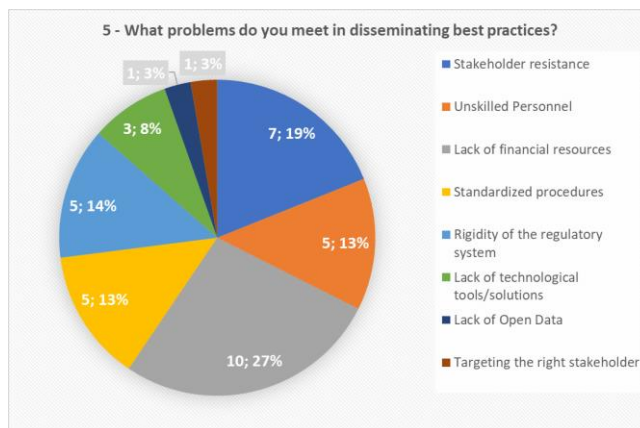
The experiences and tools developed in the projects are best practices for addressing the issue of sustainable tourism. Dissemination is therefore a "key issue" for the future of maritime and coastal tourism. For this reason, respondents were asked to find out what obstacles prevent the wide dissemination of their experiences.

5. EXPERTS' RECOMMENDATIONS TO OVERCOME THE SITUATION WITH AN INNOVATION-DRIVEN APPROACH

The GGOR aims to identify both growth opportunities and challenges for the development of sustainable tourism in coastal destinations. It was preferred to focus on the critical issues related to the main objectives identified in the KPP.

5.1 PROBLEMS AND SOLUTIONS FOR THE DISSEMINATION OF GOVERNANCE TOOLS

The graph shows the main difficulties for respondents in disseminating the tools listed in the table above "TOOLBOX FOR TOURISM GOVERNANCE".

The list of problems was provided in the survey, but it was possible to add other issues. Only one additional issue was proposed: targeting the right stakeholder. The issue is very important and it is appropriate to allocate sufficient funds and human resources. It is not easy to identify the right stakeholders for every task in the governance of a tourist destination.

A lack of financial resources was the most common problem. However, this concerns all growth objectives, not just governance. Therefore, the other issues raised by respondents are more relevant for the purposes of this paper.

Four issues are relevant to the dissemination of tools: Stakeholder resistance, Unskilled personnel, Standardized procedures and Rigidity of the regulatory system.

The first two issues concern whom the tools should be shared with. Stakeholder resistance and lack of skills are closely related. More expertise would likely facilitate the innovation process and the dissemination of new tools.

The rigidity of the regulatory system is a critical issue for those who carry out projects between regions and nations. For example, the sharing of statistical data is regulated by national laws that make the creation of international tools difficult. Therefore, the experiences listed above are very important to overcome these obstacles.

Standardized procedures are an obstacle especially where collaborations between public organisations is concerned. Every organization needs standardized procedures to be efficient. At the same time, however, the creation of networks (DMOs) generates a need to modify procedures in order to share tools. It is therefore a complex problem that can only be resolved through practical experience with projects.

The development of technology, the spread of the internet and the improvement of connections have made the use of web tools less complex. The best practices listed above demonstrate that this problem can be overcome.

Finally, we asked respondents how to deal with these problems. Despite the variety of problems identified in the previous chart, in reality, the proposed solutions focus on stakeholders. It therefore seems that stakeholder resistance is the most pressing issue of all the problems listed.

The solutions apply different strategies that highlight the existence of various difficulties in relationships with stakeholders.

Training and information are considered essential for dissemination. These actions are consistent with the issues described above. More specifically, it is necessary to explain stakeholders about the advantages that the proposed innovations can bring. Data sharing platforms are considered important to support training activities.

The second method of dissemination is to involve stakeholders in programming. Participatory processes are both useful for the quality of plans and an opportunity to train and inform stakeholders.

Finally, the support of public institutions is considered strategic, especially that of European and international institutions. Furthermore, it is believed that European networks can play an important role in disseminating best practices.

The proposed solutions are listed below:

- **Training:**
  - Webinar focus groups, round tables, educational events for stakeholders of all levels
  - Web platform of Observatory
  - Meetings with all stakeholders
  - Best case practices (first hand experiences: visits to locations, transferring of results from beneficiaries)
  - Illustrating the added value and examples that present a proof of concept
  - Presenting program results to local community groups and other local stakeholders,
  - Creating and distributing program materials, such as flyers, guides, pamphlets
  - Sharing information through social media or on an organization's website
  - A good communication strategy, bilateral meetings, staff exchanges, try-outs
  - Periodical meetings with groups of selected stakeholders for two-way exchanges
  - Implementing knowledge management systems and good practices to foster key information sharing and implementation.

- **Participatory processes:**
  - Continuous stakeholder engagement through participatory processes
  - Providing support at all stages of the implementation of best practices on their side
  - Involving a broad range of stakeholders from different governance levels and different sectors, also from the earlier stages of the project
  - Local actors should be involved from the "design" phase, taking into consideration their actual need and capability
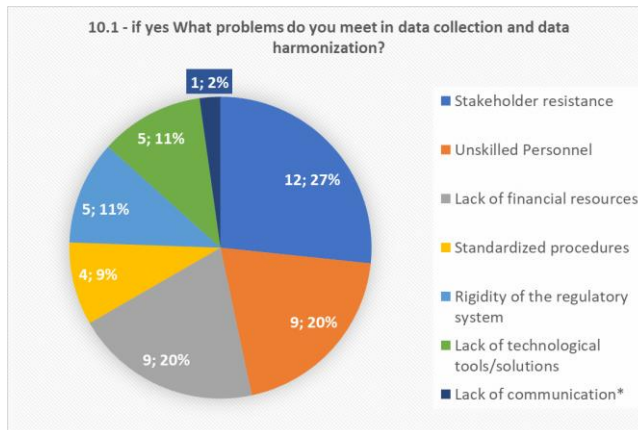
- **Support of institutions:**
  - Ensuring the support of European institutions and other relevant organisations
  - Having the support of Network organisations that can facilitate the sharing of best practices, also beyond the geographical area concerned (not just the Med area in this case) and the lifetime of the project

5.2 PROBLEMS AND SOLUTIONS FOR DIGITALISATION

Creating networks for sharing data is difficult. It is necessary to check what are the obstacles to the dissemination of data sharing tools. We have proposed two types of problems: the difficulty in collecting data and, subsequently, in sharing them. The following graph identifies several issues related to these problems.

The experiences of PANORAMED partners and MED network have highlighted that the collection of data, especially of tourist behaviour at a local level, is challenging due to an inability to create online IT platforms, a lack of organization of the collection system and no training of personnel.

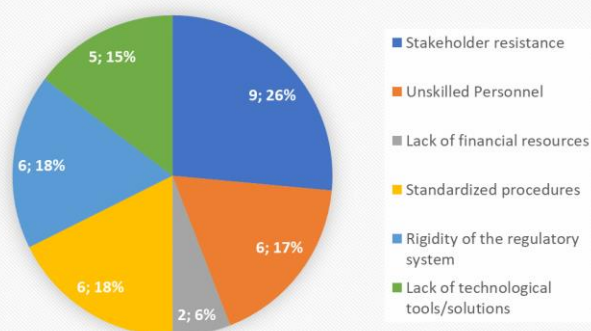*Lack of communication among different entities that collect and manage and exchange data

Two issues are related to stakeholders, regarding data collection. The lack of skills and the resistance to change, as we have said before, are closely linked. The strategies outlined in the previous paragraph are therefore also useful for this problem. Indeed, governance and digitalisation are two aspects of the same problem, as explained above, and must be addressed with the same tools and, probably, at the same time.

The rigidity of the regulatory system and internal procedures within organisations are also important problems. However, they are of less importance than the others. Faced with these challenges, the lack of financial resources is obviously an important problem, especially for the training of stakeholders at all levels of government.

One final problem must be highlighted: there is a "lack of communication between different entities that collect and manage and exchange data". The lack of communication could refer to a lack of willingness to communicate. However, we believe that this problem may be related to the "Rigidity of Regulatory System." It is likely that the creation of data sharing procedures is not easy because of national and regional regulations for each partner. We must therefore work at an international level by harmonising legislation on the sharing of statistical data.

Data sharing is only partly similar to the previous problem. It is largely related to the use for planning and governance activities.

10.2 - if yes What problems do you meet in data sharing?

- Stakeholder resistance
- Unskilled Personnel
- Lack of financial resources
- Standardized procedures
- Rigidity of the regulatory system
- Lack of technological tools/solutions

When information is available online, the problem is in facilitating their use for planning, management and marketing, in addition to the problem of procedures and regulations.

At this point, stakeholder skills are much more important than lack of resources and it becomes very important to have online platforms for smart sharing.

5.2.1 Knowledge-driven crisis management

In the governance section, we highlighted the need for crisis management tools. Tourism in the past twenty years has been full of unexpected and devastating events.

Crisis management has been developed within companies, but now it must also be developed at the level of tourist destination itself. To better explain what crisis management means, we should note that, during the pandemic, tourist destinations were forced to review their communication strategies. Many of them chose silence, others developed emergency communication campaigns with the aim of staying in touch with their target audience ("We are looking forward to seeing you but stay home now" was the concept developed for many promotional campaigns). However, no destination had a previously developed crisis management plan.

Given that public bodies reacted to the pandemic with emergency solutions, the question is: how many decisions made during the pandemic were knowledge-driven?

The first issues concern the type of data handled by the respondents. The following table shows that there is a prevalence of basic data (arrivals and overnight stays), but more sophisticated data are also available.

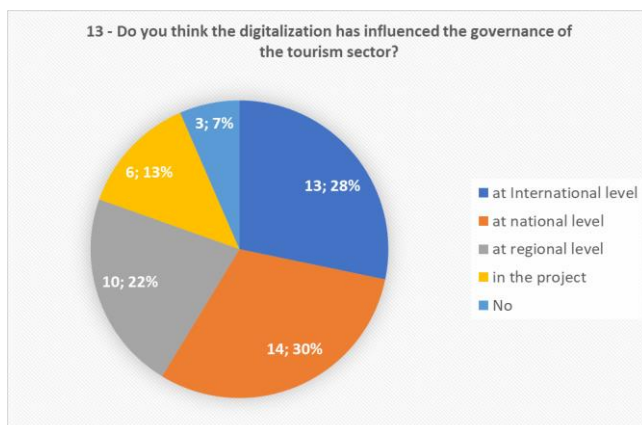| 14 - Which kind of data is managed in your data sharing experience?	
Basic data on tourism flows and guests' profiles	12
Destination management and tourism governance indicators.	7

The following is a brief list of the data available in the respondents platforms:

- Data about tourism arrivals and overnight stays
- Traffic data
- Closed public parking slots
- Twitter analysis/vigilance

Respondents confirmed that the choices made during the pandemic were driven by information and data available. This suggests the existence of a growth opportunities agenda:

13 - Do you think the digitalization has influenced the governance of the tourism sector?

- at International level — 13; 28%
- at national level — 14; 30%
- at regional level — 10; 22%
- in the project — 6; 13%
- No — 3; 7%

- Adopting and using Destination Management System: increase availability of common and harmonised digital tools in order to facilitate the collection, exchange and interpretation of data and contact tracing;
- Ensuring comprehensiveness and inter-operability of and open access to tourism data;
- Providing necessary digital skills for tourism practitioners (network capacity building[49]; data collection and analysis capacities);
- Including the tourism dimension in regional digital strategies/policies/RIS3 strategies[50];
- enhancing digital security to improve stakeholder and tourist acceptance of digital services[51].

As stated above, public bodies are not yet able to exchange data with each other in real time. Therefore, the dissemination of data collection and sharing tools is very important for the development of knowledge-driven policies. Especially for action at the Mediterranean level. For this reason, respondents were asked to provide dissemination strategies:

- building a unique dashboard for collecting and sharing data
- simply meetings
- showing the results achieved, with the support and contribution of local municipalities to give more credibility to the results
- implementing private-public efforts to spread the new future of tourism
- using data to learn what's happening and making predictions
- establishing regional DMOs, operating under the umbrella of a national DMO, with the participation of both the public and private sector as well as research institutions[52]
- a good communication strategy
- a network of regions and their lobbying activities
- promoting collaboration between key stakeholders by collecting, organising and analysing data[53]
- involving local stakeholders from the "design" phase, taking into consideration their actual need and capability.

A more general consideration emerges from several responses: in digitalisantion and data sharing, the organisation that supports the ICT tool is relevant. It is not a matter of technology,

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[49] Smart tourism relies on the development of collaborative network relations
[50] Commission Staff Working Document "Scenarios towards co-creation of transition pathway for tourism for a more resilient, innovative and sustainable ecosystem", Brussels, 21.6.2021
[51] idem
[52] These DMOs can establish a common knowledge network that could research and analyse topics that are important on a regional level. Interpretation of research results in recommendations for tourism practices based on the good practices of other DMOs can prove to be an effective strategy.
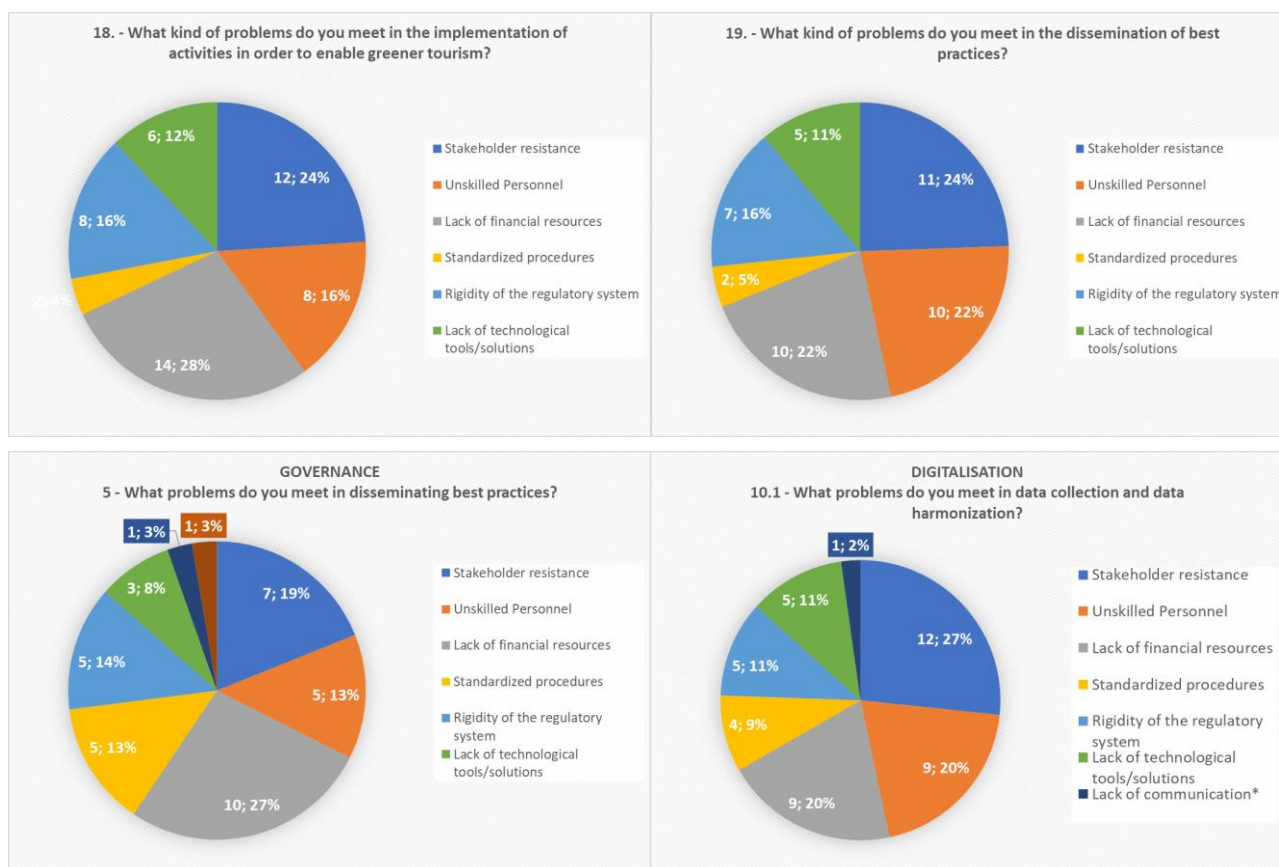[53] This information should be easy to access; use official statistics, traditional methodologies and Big Data; make the automation of processes possible; and have an expanded and concrete vision of the territory, including its weaknesses and opportunities.

but mainly of how the ecosystem is organised. Sustainability should be taken into consideration (skills, financial, organisational, etc.).

5.3 PROBLEMS AND SOLUTIONS FOR GREENER TOURISM

Comparison with the other two key issues helps better understand the difficulties in disseminating results:

A lack of financial resources is a major problem in the three areas. However, it is particularly an issue for creating more sustainable destinations. The complexity of the problems faced when trying to convert a destination (waste, overtourism, etc...) explains why, in this case, the lack of financial resources is one of the main problems.

The resources needed to convert a destination will probably not be available at the same time. It is therefore necessary to define a "working plan" agreed upon at the Mediterranean level with a scale of priorities and a selection of tools. Thus, synergies are created between destinations and countries to address the issue jointly.

Lack of skills and stakeholder resistance are difficult obstacles to overcome. A change in behaviour and lifestyles can be achieved with constant action over time. The respondents highlighted that only by identifying shared objectives and involvement in programming, through participatory processes, is it possible to achieve this goal. Participatory processes are long-term, therefore sharing best practices is necessary to achieve the goals in a short amount of time.

On the issue of dissemination, it is necessary to mention BEST MED's Charter on Sustainable Tourism, which is under development and will summarise the information collected in the MED Sustainable & Cultural Path Model (MED S&C Path Model) into clear political messages and be aimed at sustainability. The Charter consists in a Policy Paper of joint transnational action aiming at contributing to EU policies towards the European Parliament. This Policy Paper will focus on the fact, among others, that there is a huge potential for sustainable tourism in using Big Data to gain relevant insights and information on customers' experiences, interests, opinions, etc. and for policymakers and authorities to create value out of these data and improve sustainable tourism management. This Policy Paper will be focused as well on the fact that these actions should be performed while pursuing and supporting the work undertaken by the UNWTO International Network of Sustainable Tourism Observatories (INSTO), in order to unlock the power of evidence-based decision making at destination levels and foster sustainable tourism practices locally and globally. The Charter will be presented in the Final Capitalisation Conference in Granada, Spain, in late 2022 and will be signed by the regional governments to implement the new MED Sustainable Path and Cultural Routes Model (MED S&C Path Model), as well as by all partners and key / relevant actors in the sustainable tourism field at MED level.

6. OVERVIEW OF GAPS AND GROWTH OPPORTUNITIES WITHIN THE NEW PROGRAMMING PERIOD

The legacy of the PANORAMED project and partner projects can and should be disseminated and strengthened in the next European programming period. The following table contains the project drafts that emerged within the questionnaire and some examples of the European financial opportunities within the programming period 2021-2027 that could accommodate these ideas.

TOPIC	PROJECT IDEA	EU PROGRAMME
Digitalisation; greener tourist destination	**Fondazione per la Ricerca e l'Innovazione – Italy** A possible Herit-Data project follow-up is one of the options on the table.	• Interreg Euro-MED (Priorities 1: Smarter MED and 2: Greener MED) • Interreg Italy-France Maritime (Topics Competitiveness of SMEs; Environment and resource efficiency) • I3 instrument
Greener tourist destination	**Region of Crete** Ideas have not been formed yet, however; it is our intention to exploit the knowledge gained from PANORAMED during the new programming period. Coastal and maritime tourism are of extreme importance for the Cretan economy. It is our intention to create a greener tourist product that lives in harmony with the environment, especially in the many protected areas of Crete. The restart of tourism because after COVID is a good chance to implement important changes with the support of EU funds.	• Interreg Euro-MED (Priority 2: Greener MED) • Interreg ADRION (Priority 1: more competitive and smarter Europe; 2: greener Europe; 4: Better Governance) • Interreg Europe (Priority Governance) • I3 instrument
Better Governance; Digitalisation; greener tourist destination	**International Union for Conservation of Nature (IUCN Med)** Communication with our members and integration of PANORAMED knowledge into our own production, either from NECSTouR or Sustainable Tourism events (in Barcelona in June, in Brussels in October).	• Interreg Euro-MED (Priorities 1: Smarter MED and 2: Greener MED) • Interreg Europe (Priority Governance) • Interreg NEXT MED (Priority Governance) • I3 instrument
Better Governance; Digitalisation;	**Conference of Peripheral Maritime Regions – Intermediterranean Commission (CPMR-IMC)**	• Interreg Euro-MED (Priorities 1: Smarter MED, 2:

| greener tourist destination | Through its Geographical Commissions, the CPMR could help capitalise on the results of cooperation projects that are in line with the targets and objectives identified, in order to address the main issues of the PANORAMED project, particularly in relation to:
• "better governance": integrated planning and management of Mediterranean destinations (e.g. BESTMED - Med S&C Path Model and NSTO; SMARTMED - SMART Tourism Business Model);
• "digitalisation": the exploitation of digital innovation in tourism (e.g. HERIT-DATA), the improvement of management/use of tourism data (e.g. BEST MED, MITOMED+ projects), up/re-skilling of tourism workers with a focus on innovation and digitalisation (e.g. SMARTMED project);
• "greener tourism destinations": the integration of regional tourism and conservation policies (e.g. DESTIMED+); the mitigation of seasonality (e.g. WINTER MED project), the exploitation and monitoring of sustainable tourism data (e.g. BEST MED, MITOMED+ projects)
This could be done by supporting the exchange of good practices among a variety of stakeholders in the field and facilitating their replication, adaptation and integration in different territories. | Greener MED and 3: MED Governance)
• Interreg Europe (Priority Governance)
• Interreg NEXT MED (Priority Governance)
• I3 instrument |
| Digitalisation; greener tourist destination | **Ministry of Tourism and Sport – Croatia**

Actions and measures for digitalization and green transition of the tourism sector - private and public have been included in the National Recovery plan. | • Interreg Euro-MED (Priority 2: Greener MED)
• Interreg ADRION (Priority 1: more competitive and smarter Europe; 2: greener Europe; 4: Better Governance)
• Interreg Europe (Priority Governance)
• Interreg Italy-Croatia CBC (Priority 2: environmental care; 3 Integrated Maritime connection; 4 |

		Heritage Valorization) • I3 instrument
Better Governance; Digitalisation; greener tourist destination	**Ministry of Tourism – Greece** Under the Resilience and Recovery Plan, Greece aims to launch interventions to enhance Green & Blue Development. Green development aims to extend, develop and promote the tourist season beyond traditional peak periods by supporting alternative forms of tourism in order to develop their facilities in a green and smart way. Blue Development targets to develop facilities around sea areas. Actions will include improvements to make beaches accessible to people with disabilities and improvements of ports for a general transformation that would secure high-quality, green and smart infrastructures. The creation of DMOs will be supported by Sustainable Tourism Observatories in order to provide data that will contribute to the development of tourism strategies. Digitalisation interventions include the development of a Single Registry of Tourist Enterprises platform for the interoperability of public registries and systems.	• Interreg Euro-MED (Priority 2: Greener MED) • Interreg ADRION (Priority 1: more competitive and smarter Europe; 2: greener Europe; 4: Better Governance) • Interreg NEXT MED (Priority Governance) • Interreg Europe (Priority Governance) • I3 instrument

Abbreviations

- DMO - Destination Management and/or Marketing Organizations
- EC - European Commission
- EP TRAN - European Parliament's Committee on Transport and Tourism
- GGOR - Gaps and Growth Opportunities Report
- KPP - Key policy paper
- KPI - Key Performance Indicators
- SMEs - Small and medium-sized enterprises
- UNWTO - World Tourism Organization

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