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## Gaps and Growth Opportunities Report

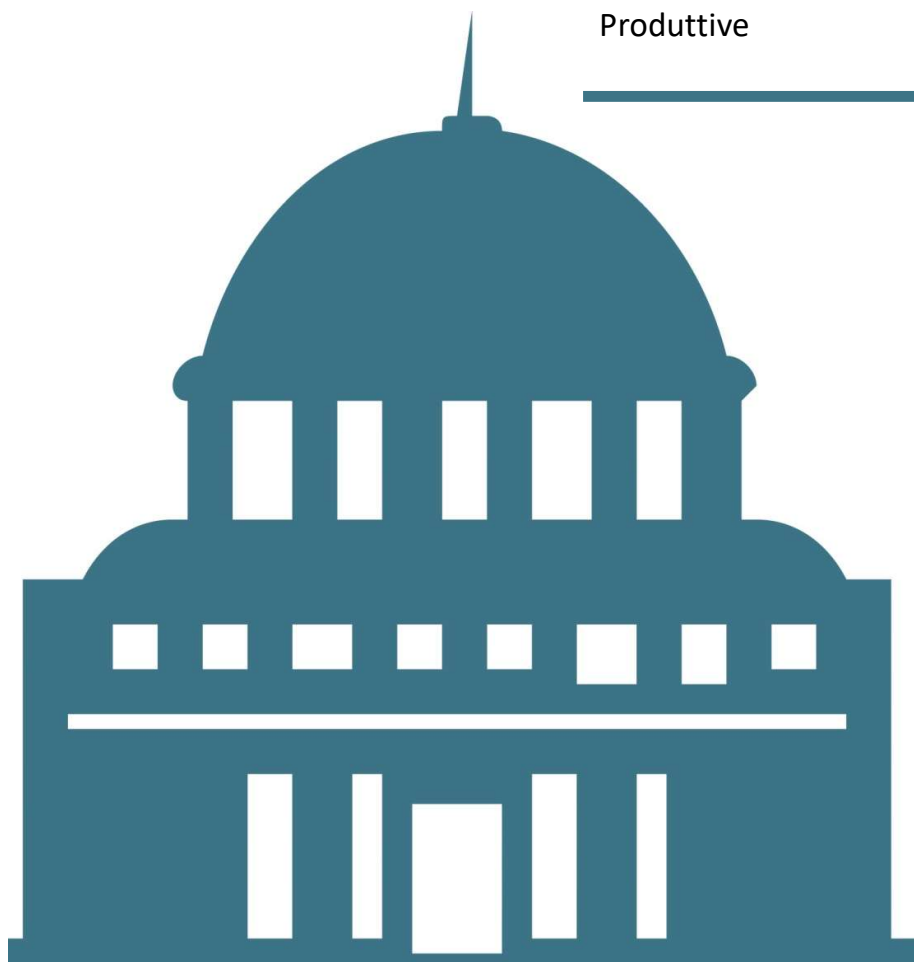
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Ministry of Regional  
Development and EU Funds  
of Croatia and Regione  
Toscana – Direzione Attività  
Produttive

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## IDENTIFICATION

<b>Project Number</b>	3186	<b>Acronym</b>	PANORAMED
<b>Full title</b>	MED Governance Platform		
<b>Axis</b>	AXIS 4: Enhancing Mediterranean governance		
<b>Partner Responsible</b>	Ministry of Regional Development and EU Funds of Croatia and Regione Toscana – Direzione Attività Produttive - Economic Promotion and Tourism Department		
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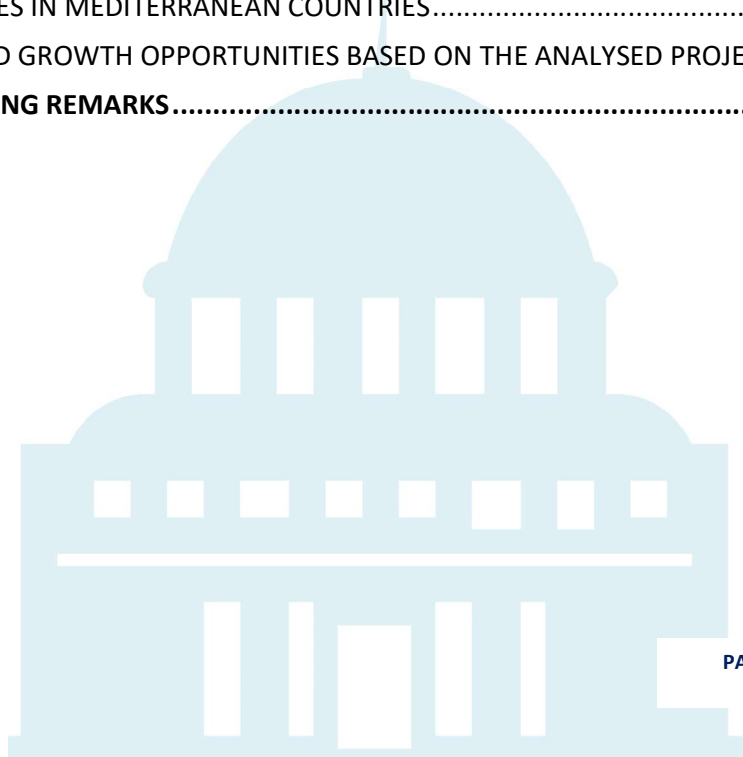
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<b>Description of the deliverable</b>	The Gaps and Growth Opportunities Report (GGOR) is a document containing the analysis and evaluation of the results of the projects relevant to the strategic theme of Coastal and Maritime Tourism of PANORAMED project. The GGOR uses the Project Results Collection Matrix 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.
<b>Key words</b>	Gaps; growth opportunities, results, project results, assessment, evaluation

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Gaps and Growth Opportunities Report	30 August 2019	Final version	Final version based on revision of the first sound draft according to feedback and comments from TWG5 experts, project partners and country coordinators	

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## 1. INTRODUCTION

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**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<sup>1</sup> 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.

The document, in its unfolding, offers first of all a snapshot of the existing status to pass then to the analysis of the results of MED projects (previous and ongoing) and those produced in the framework of other programs/initiatives implemented in the Mediterranean region through a research-based methodology, in order to scientifically compare them during the implementation of the successive benchmarking analysis and elaboration of key documents.

This analysis represents the base to then identify and develop **gaps and growth opportunities** for the MED area, in terms of national and international legal schemes and national and European/international policy development. Inputs coming from ad-hoc **Focus Groups<sup>2</sup>** were included in the document to support the results of GGOR. Contributions from the work of the other PANORAMED work packages are expected. In this first version of GGOR it was possible to have the contribution of **liaising** with other programs and initiatives in the MED area; for **mainstreaming** results, **migration** flows and **innovation** actions inputs are awaited in the updated version of GGOR. Due to the latter and by its own nature, the gaps and growth opportunities report, will also serve as a base for the identification of potential actions to be implemented by **MED modular/horizontal projects**.

Based on the data and information collected and on the related gaps and growth opportunities, TWG5 drafted the terms of reference of top-down strategic projects in coastal and maritime tourism and will trace relevant draft of **key documents** (policy papers, action plans, feasibility studies, multilateral agreements, new cooperation schemes that will be discussed and endorsed during the cross-sector/thematic high-level events) with reference to the overall governance and strategic dynamic in the Mediterranean. Finally, gaps and growth opportunities will be used **to plan and prepare relevant strategic initiatives, define joint policy approaches at transnational level and involve 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.

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<sup>1</sup> According to the Application Form, “transnational Thematic Working Groups (TWG) will analyze 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 analyzed by transnational Thematic Working Groups to identify relevant policy, legislative, thematic, geographic, technical gaps.”

<sup>2</sup> By Focus Group it is intended an interactive meeting with a restricted number of participants, discussing on selected themes and aiming at highlighting gaps and growth strategies. In this case the experts and other attendees were related to coastal and maritime tourism sector. Finally, on the basis of the outcomes, a dedicated report is generated.

Specifically, the GGOR plans to be a fostering and stimulating instrument for the continuous debate on these topics by the countries involved in PANORAMED, at regional, national and international level. The overall process is in fact aiming to create focalized discussions on the topics tackled in the document, by involving a large number of interested parties at the different governmental levels. The next steps will go in the direction to stimulate/trigger the subsequent contribution of the national and transnational stakeholders to whom GGOR will be delivered.

With reference to the above, it is important to mention that GGOR will be updated during the implementation of PANORAMED project.

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## STRUCTURE

GGOR is structured into **5 main chapters**, starting with a general introduction containing an overview of Interreg MED 2014-2020 Programme and PANORAMED role within the Programme. Quite related to the introduction part, the second chapter is a comprehensive screening of the major issues and strategic objectives of the coastal and maritime tourism policies in the MED area. This specific chapter refers first to a brief statistical overview of arrival and receipts of tourists in the world areas and then in the Med countries, then gives an overall vision on the tourism-related policies taking place in coastal and maritime tourism and on new policy development at national and regional level.

The document core can be considered chapter 3, which is dedicated to the analysis allowing for the subsequent identification of the gaps and growth opportunities, based on several inputs and different sources (desk analysis, interviews, focus groups et al.). Among the many, of key relevance are undoubtedly the **results deriving from the desk and field analysis, benchmarked and ranked according to predefined categories** (national and international legal schemes and national and European/international policy development). Also, a clustering approach related to tourism, sustainability and policy & mainstreaming referring to the projects analyzed is implemented so to provide further elaborated information. These contents are and will be complemented by inputs from PANORAMED **cross-cutting tasks (liaising, migration and mainstreaming) and associated partners of PANORAMED project (further in text: AP)<sup>3</sup>**, exploiting potential synergies and adding value to previously conducted analysis and related results. Also MED Horizontal Projects have been and will be involved in multiple ways in the future reviewing process steps of GGOR. The **potential synergies** with the other strategic theme of PANORAMED – **Maritime Surveillance (WP6)** and the synergies/complementarities with other tourism segments, which are still missing pieces, will be developed as soon as the results of the other project WPs will be issued and included in the following GGOR updates. The last subchapter collects the outcomes coming from TWG5 tourism experts and developed during two **Focus Groups**, where the aim was to develop gaps and growths pathways in relation with the correspondent policies.

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<sup>3</sup> APs are part of PANORAMED's strategic and unique partnership scheme to create synergies with institutions and active strategies in the Mediterranean. APs do not receive financial aid from PANORAMED, they help the objectives of the project with their knowledge and experience in relevant matters. APs include: Conference for Peripheral Maritime Regions (CPMR), Union for the Mediterranean (UfM), EUSAIR, BLUEMED, ENI CBC MED, INTERACT, Interreg ADRION, Interreg BALKAN MED, United Nations Environmental Programme/ Mediterranean Action Plan (UNEP/MAP) and Interreg Europe.

Chapter number 4 collects the main inputs of chapter 3 together with the main gaps not addressed by ongoing policies or projects analyzed.

The final chapter 5 focuses on the main remarks coming from the whole document, investigating **the relation between existing policies, implemented projects and identified gaps** in terms of pinpointing both the enabling and limiting conditions, seeking solutions for the future. Potential overlaps between the many different results coming from as many sources will also be highlighted and deepened.

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It's important to stress out how the overall elaborated results, complemented by inputs from the above-listed stakeholders, are to be converged towards recommendations for future sustainable growth and pursued through strategic projects, but also to trigger broader discussions with the stakeholders themselves.

Overall, PANORAMED paramount objective is to support capacity building of national and regional authorities of the INTERREG MED Programme to respond to Mediterranean governance challenges on transnational gaps and opportunities, therefore the specific results of the project and related activities can be developed and achieved only through transnational cooperation.

Bearing this in mind, GGOR, as one of the core outputs of PANORAMED, represents a valuable and multifaceted document to be used **both at regional/national levels as well as transnational ones**. Given its comprehensive coverage leading from problems to solutions, **it is a constructive tool for future planning and strategic initiatives**. The political commitment of PANORAMED participating countries should serve as a substantial guarantee of the joint willingness to tackle common challenges with common solutions in the future. GGOR can, thus, contribute to mobilizing **key stakeholders** (e.g. strategies, initiatives and programmes in the MED area) engaging them in a constructive dialogue converged towards joint sustainable growth solutions.

## 1.1. SHORT OVERVIEW OF THE INTERREG MED 2014-2020 PROGRAMME

Interreg Mediterranean 2014-2020 (Interreg MED programme) is a transnational European Cooperation Programme financed by the European Regional Development Fund (ERDF) and the Instrument for Pre-accession Assistance (IPA). It consists of 57 regions divided among 10 EU Member States and 3 countries from the Instrument for Pre-Accession Assistance (IPA).

ERDF countries: Croatia; Cyprus; France; Greece; Italy; Malta; Portugal; Slovenia; Spain; United-Kingdom

IPA countries: Albania; Bosnia-Herzegovina; Montenegro





1. Figure: Interreg MED 2014-2020 Cooperation Area



## Interreg MED 2014-2020 COOPERATION AREA



The transnational programme gives the possibility to each partner to tackle challenges beyond national borders, such as the rise of low carbon economy, the protection of natural and cultural resources and the strengthening of innovation. The main objective of the Interreg MED Programme is to promote sustainable growth in the Mediterranean area by fostering innovative concepts and practices and a reasonable use of resources and by supporting social integration through an integrated and territorially based cooperation approach. For IPA countries the participation in the Programme is an important part of the process of EU integration.

The total budget for the 2014-2020 period amounts to 265 million €, composed of 224 million € ERDF (European Regional Development Fund), 9 million € IPA (Instrument for Pre-accession Assistance) and national co-funding. The co-financing rate for partners not concerned by state aid is 85%. The co-financing rate for economic operators and structures concerned by state aid is 85% or 50%.

In the period 2014-2020, Interreg MED Programme promotes cooperation between a varied typology of actors of the thirteen Mediterranean countries. The aim lies in optimizing existing results achieved in the previous period as well as facilitating new cooperation frameworks for all partners situated in the Programme cooperation area. Accordingly, Interreg MED Programme establishes the following key cooperation principles aiming at consolidating the peculiarity of future projects and their related activities. These fundamental principles represent the DNA of the Interreg MED Programme and are coherent with the promotion of development and of good

governance, furthermore, are supported by the European Union Cohesion Policy. The principles are as following:

- Thematic concentration
- Result-orientation
- Transnationality
- Territorial relevance
- Sustainability
- Transferability
- Capitalisation

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The Europe 2020 strategy together with the Territorial Agenda 2020 provides the strategic framework for EU cohesion policy 2014-2020 and as such for the Interreg MED Programme. The regulatory framework is provided by the regulations for cohesion policy 2014-2020. These are accompanied by a Common Strategic Framework (CSF) setting out key actions to address EU priorities and giving guidance to ensure coordination between funds. For the period 2014-2020, the Commission proposed important changes to the way the cohesion policy should be implemented. One important aspect for future project design is the demand for fewer, but more result oriented and high-quality projects. More emphasis must be put on the demand side to clearly identify the real needs of target groups and end-users to ensure a more effective use of projects outputs. The MED 2014-2020 programme is committed to the development of a new thematic and methodological basis in order:

- to seek the quality improvement of contents and aims of the programme, pursuing the development already started in the 2007-2013 programming period;
- to respect the requirements of the Regulations recalling for more thematic concentration;
- to answer the demands of the actors of the European territorial cooperation in the challenging socio-economic context of the Mediterranean.

The Cooperation programme developed by the participating States and validated by the Commission, is completed with Terms of Reference that detail the aims of each Specific Objective and are divided in the three thematic axes, as it follows:

- Priority axis 1 “Innovation”: Promoting Mediterranean innovation capacities to develop smart and sustainable growth
- Priority axis 2 “Low carbon economy”: Fostering strategies and energy efficiency in specific MED territories: cities, islands and remote areas
- Priority axis 3 “Natural and cultural resources”: Protecting and promoting Mediterranean natural and cultural resources

They are complemented by a fourth cross cutting axis:

- Priority axis 4 “Governance”: Enhancing Mediterranean Governance.



## 1.2. THE ROLE OF PANORAMED IN THE FRAMEWORK OF INTERREG MED 2014-2020 PROGRAMME

The Mediterranean area is one of the most heterogeneous EU cooperation areas. Geographical, economic and political contexts can vary significantly from one region to another and implementation of shared operational plans on the overall area in key sectors like maritime safety, transports, energy or pollution and environmental protection is challenging. In this context, the axis 4 is devoted to the **enhancement of the capacities of the national and regional authorities to contribute to the governance efforts in the Mediterranean**, principally identified in the EU macro regional strategy EUSAIR and the WESTMed initiatives, but not only. Axis 4 has the main following objectives:

1. to identify and promote strategic projects regarding coastal and maritime tourism and maritime surveillance, starting from an analysis of the impact of cooperation projects funded in the framework of the 2007-2013 and 2014-2020 programming periods;
2. to strengthen the relationships among Institutions that promote strategies, programs, projects and initiatives for the Mediterranean and to promote a systemic vision of the Mediterranean policies, sharing governance tools to improve the policies themselves.

Concretely, this axis 4 is implemented through a **platform of national and regional authorities**, the **PANORAMED project**, that joins 21 state-level and regional authorities of the European States of the Mediterranean shores, from Portugal to Cyprus, including three IPA Programme States, namely Albania, Bosnia and Herzegovina, and Montenegro. The IPA inclusion is important as the initiative also aims to develop and strengthen collaborations between IPA countries and their neighbours (both EU-member and IPA) and to share know-how, experiences and best practices between these states, helping the advancement of the accession process.

The partnership is complemented by major Mediterranean actors to concretely act complementarities and synergies in defining strategic projects and contributing to shared policies and frameworks of actions. These, already mentioned, associated partners are the following: Union for the Mediterranean, the United Nations Environmental Programme/Mediterranean Action Plan (Barcelona Convention), the BLUEMED Initiative for research and innovation in the Mediterranean, the EUSAIR macro regional strategy Facility point, the Conference for Peripheral Maritime Regions (CPMR), the programmes ENI CBC MED, INTERREG ADRION, INTERREG BALKAN MED, INTERREG EUROPE and INTERACT. Additional exchanges and synergies with the WESTMED Initiative for the sustainable development of the Blue Economy in the Western Mediterranean are also envisaged. Three Directorates General of the European Commission accompany the initiative. That are: DG REGIO (Regional Policy), DG MARE (Maritime Affairs and Fisheries) and DG NEAR (Neighbourhood and Enlargement Negotiations).

PANORAMED project was approved in June 2017, with a nine-million-euro total budget and will be running until spring 2022. The project ensures a medium/long-term perspective and has the potential to give a positive contribution to new EU strategies in the Mediterranean beyond the time length of the INTERREG MED Programme. Within this timeframe, PANORAMED will provide opportunities:

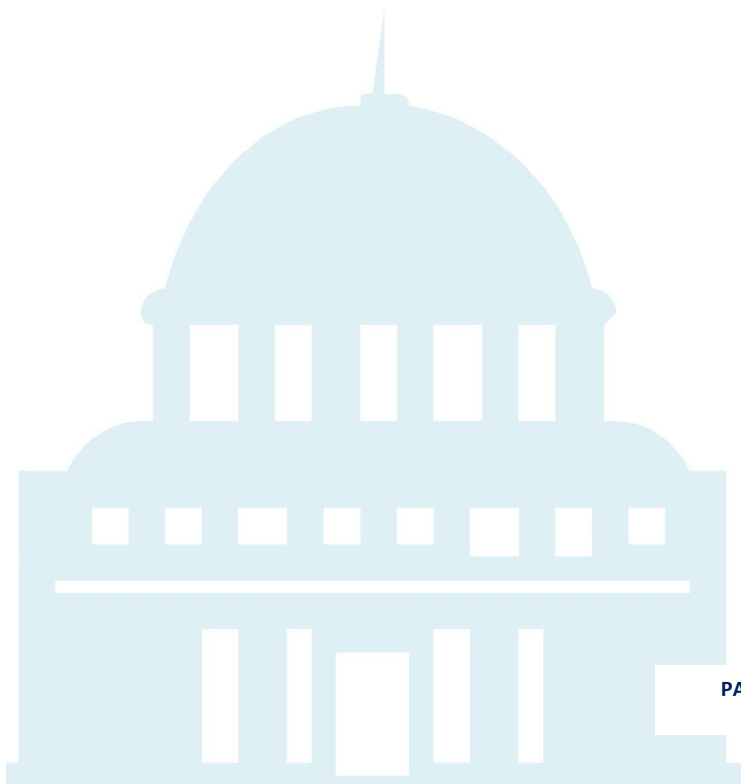
- To organize high level events aiming at improving the Med area's governance covering the whole territory
- To promote the preparation of strategic projects, through dissemination events in each Country and the preparation and launch of Terms of Reference.

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

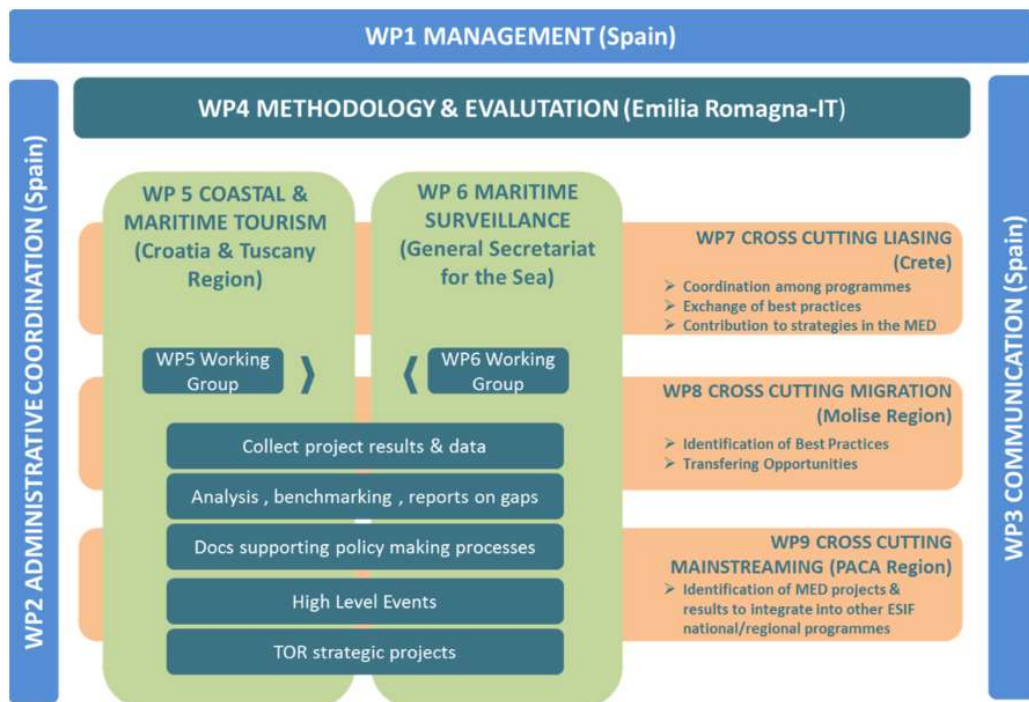
- Work Package 5: "Coastal and Maritime Tourism"
- Work Package 6: "Maritime Surveillance"
- Work package 10: "Innovation"

Partners in charge of these Work Packages have the responsibility to identify Mediterranean cooperation projects implemented in their field of intervention and to analyse them with the support of national experts (desk and field analysis). This analysis, enriched with the expertise of national experts, provides the ground for the drafting of the "Gaps and Growth analyses". Each of the three Work Package teams elaborates its own Gaps and Growths analysis, with the objective to foster the involvement of regional/national/international stakeholders in continuous debates and discussions on the relevant topics highlighted in WP5, WP6 and WP10. Gaps and Growth analysis is also functional to Terms of Reference for Strategic Projects development depicting both the identified challenges in the respective fields as well as proposed solutions to these issues. This analysis considers also the activities achieved by the other work packages:

- Work Package 7 "Liaising": Connexion of the MED programme with other Mediterranean INTERREG programmes, strategies, initiatives and organisations;
- Work Package 8 "Migration": Reflexion on how to take into account the issue of "migration" in the activities of the MED programme;
- Work Package 9 "Mainstreaming": Experimentation of the share and transfer of outputs produced by MED and other ETC Mediterranean programmes towards other programmes and public policies (capitalisation and transfer of outputs).



2. Figure: Organisation of PANORAMED (until December 2018 when WP10 was introduced)



Coming back to the aforementioned strategic projects, it is important to highlight that they are conceived in the framework of the governance Axis of the MED Programme. Therefore, they reflect the related overall approach that has guided the design of PANORAMED, namely in terms of contribution and coordination with key initiatives and dynamics active in the Mediterranean as well as with reference to the top down approach in the key actions and the partnership. The strategic projects are “multilevel” projects implemented by partners that can exercise an influence on the definition of or even by directly defining policies, through a set of inter-sectoral actions, strictly coherent and linked to each other. These actions should converge towards a common objective of territorial development and justify a unitary implementation approach. The collective ownership of the strategic projects will enable to translate them into effective political leverage and showcase good examples of regional cooperation. In this sense strategic projects shall be 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 should be implemented following a territorial, integrated, inclusive and participative approach. This means that the projects should facilitate 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 "Coastal and Maritime Tourism" and "Maritime Surveillance"<sup>4</sup>, are aiming:

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

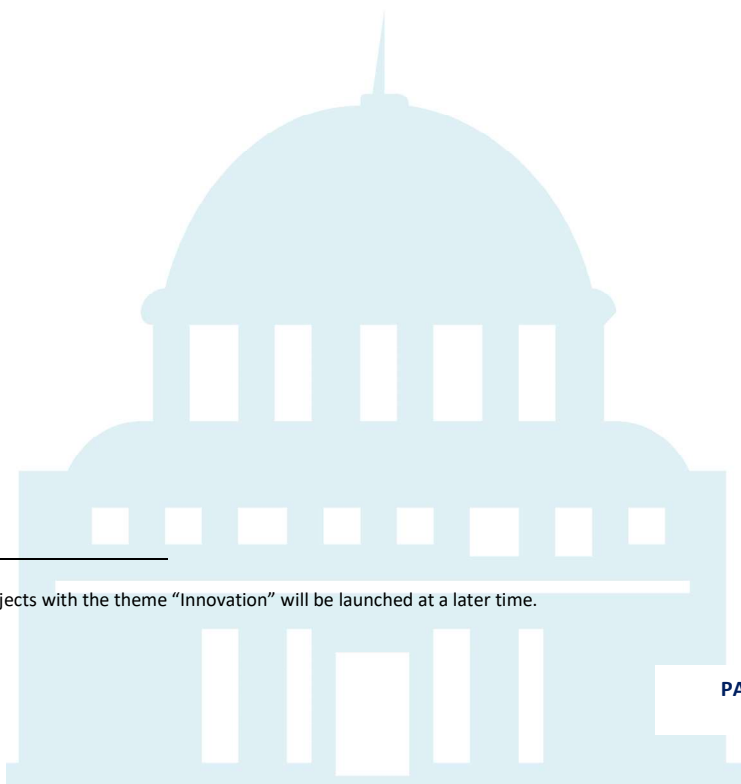
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In order to reinforce the impact of strategic projects, the maximum consistency must be ensured with the main guidelines and strategies of the European Union and those of the Program participating Countries. Their impact has to be tied together with a vision that targets the next programming period, anticipating the definition of adequate implementation procedures in response to the priorities of the post 2020. The results outlined above can be achieved through:

- Wide coverage of the programme area;
- Institutional partnership (public bodies or public equivalent bodies and associations of stakeholders at Mediterranean/international level);
- Common and shared interests for a wide partnership of the Med area (high level goal gathering wide interest);
- Sufficient budget to guarantee important actions.

The "improvement of governance" above mentioned includes better coordination of strategies at the Mediterranean level, shared use of existing data or tools and strengthened coherence between the different institutional levels. These future strategic projects will therefore have to mobilize the European and national authorities of the countries participating in the programme, in coordination with the regional and local authorities of the eligible territories.

<sup>4</sup> A call for strategic projects with the theme "Innovation" will be launched at a later time.



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

### 2.1 STATISTICAL OVERVIEW OF TOURISM ACTIVITIES TRENDS IN MED AREA

Tourism is the world third largest export category and is a major source of income for many countries. The latest annual report based on 2017 tourism statistics published by the World Tourism Organization (UNWTO)<sup>5</sup> indicates a significant rise in tourism related to international arrivals and revenues both worldwide and in Europe.

Worldwide the number of international arrivals in 2017 was over 1.326 billion, which is a 7% increase compared to the previous year, the highest growth the sector has experienced since 2010. The total tourism-related receipts amounted at 1,194 billion EUR which is a 5% increase over 2016.

1. Table: World's top tourism destinations (by arrivals)<sup>6</sup>

Rank 2017	Rank 2016	Country	International arrivals (million)	Variation 2017 (%)
1	1	France	86,9	5,1
2	3	Spain	81,8	8,6
3	2	USA	76,9	0,7
4	4	China	60,7	2,5
5	5	Italy	58,3	11,2
6	8	Mexico	39,3	12,0
7	6	United Kingdom	37,7	5,1
8	10	Turkey	37,6	24,1
9	7	Germany	37,5	5,2
10	9	Thailand	35,4	8,6

<sup>5</sup> UNWTO TOURISM Highlights, 2018 Edition. <https://www.e-unwto.org/doi/pdf/10.18111/9789284419876>

<sup>6</sup> Source: UNWTO TOURISM Highlights, 2018 Edition. <https://www.e-unwto.org/doi/pdf/10.18111/9789284419876>

2. Table: World's top tourism destinations (by receipts)<sup>7</sup>

Rank 2017	Rank 2016	Country	International tourism receipts (billion EUR)	Variation 2017 (%)
1	1	USA	187,7	1,9
2	2	Spain	60,5	10,1
3	3	France	54,0	9,0
4	4	Thailand	51,2	13,1
5	5	United Kingdom	45,6	12,1
6	7	Italy	39,4	7,7
7	9	Australia	37,1	9,3
8	8	Germany	35,5	4,2
9	12	Macao (China)	31,7	17,6
10	11	Japan	30,4	14,4

In table 1 the lists of the top 10 tourism destinations shows that 6 European countries are among the world's 10 most visited destinations, with France and Spain claiming the top 2 spots. The European share of this market is indeed especially high, and European countries experienced an even larger growth compared to the worldwide average. The total international arrivals to European countries in 2017 were over 672 million people, which is an 8% increase (higher than the world average) over the 2016 numbers. This means an over 50% market share for Europe. The respective receipts in Europe amounted to 461,5 billion EUR, again an 8% increase (and higher than the world average), which puts the European market share in terms of tourism receipts at around 39%.

Regarding the world most visited regions, 2017 marked the eighth year in a row of sustained growth in European regional tourism. Leading the charge was Southern Mediterranean Europe with a growth of 13% in arrivals and 11% in receipts. Turkey's recovery from previous years' decline in tourism contributed to this growth, but traditional destinations showed a continuous expansion; Italy and Spain showed an increase of 6 million arrivals each. France also recovered from the decline caused by previous years' security incidents and remained a top destination worldwide.

<sup>7</sup> Source: UNWTO TOURISM Highlights, 2018 Edition. <https://www.e-unwto.org/doi/pdf/10.18111/9789284419876>



3. Table: Arrivals in European (Sub)Regions<sup>8</sup>

	Arrivals (million)							Market share %	Change %	Change %
	1995	2000	2005	2010	2015	2016	2017	2017	16/15	17/16
Europe (total)	308,5	329,9	452,7	487,7	605,1	619,5	671,7	51	2,4	8,4
Northern Europe	36,4	44,8	54,7	56,6	69,8	73,8	77,8	6	5,8	5,5
Western Europe	112,2	139,7	141,7	154,4	181,5	181,6	192,7	15	0	6,1
Central/ Eastern Europe	58,9	69,6	95,3	98,6	122,4	127,1	133,7	10	3,8	5,3
Southern/ Mediterranean Europe	100,9	139,0	161,1	178,1	231,4	237,1	267,4	20	2,4	12,8

4. Table: Receipts in European (Sub)Regions<sup>9</sup>

	Receipts (billion EUR)			Market share %	Change %	Change %
	2015	2016	2017	2017	16/15	17/16
Europe (total)	461,9	417,1	462,6	39	1,7	7,7
Northern Europe	73,0	74,1	79,9	7	8,5	5,1
Western Europe	141,8	140,1	151,9	13	-1,2	6,6
Central/ Eastern Europe	44,9	46,9	53,4	4	6,2	11,1
Southern/ Mediterranean Europe	157,1	156,0	177,4	15	-0,2	7,3

A more detailed look at the Southern and Mediterranean European countries (including all of France) shows traditional tourism destinations, meaning France, Spain and Italy, with the largest market share within the whole area.

<sup>8</sup> Source: UNWTO TOURISM Highlights, 2018 Edition. <https://www.e-unwto.org/doi/pdf/10.18111/9789284419876>

<sup>9</sup> Source: UNWTO TOURISM Highlights, 2018 Edition. <https://www.e-unwto.org/doi/pdf/10.18111/9789284419876>

5. Table: Tourism in Southern / Mediterranean Europe<sup>10</sup>

Southern/ Mediterranean Europe + France	International tourist arrivals (million)			Change %	Change %	Market share %	International tourism receipts (billion EUR)			Market share %
	2010	2016	2017	16/15	17/16	2017	2010	2016	2017	2017
Albania	2,191	4,070	4,643	7,5	14,1	0,7	1,449	1,507	1,719	0,4
Andorra	1,808	2,831	3,003	6,3	6,1	0,4	-	-	-	-
Bosnia and Herzegovina	0,365	0,777	0,922	14,6	18,7	0,1	0,529	0,645	0,736	0,2
Croatia	9,111	13,809	15,593	8,9	12,9	2,3	7,195	8,584	9,733	2,1
Cyprus	2,173	3,187	3,652	19,8	14,6	0,5	4,958	2,455	2,787	0,6
France	77,645	82,700	86,918	-2,1	5,1	13,0	50,840	48,587	54,067	11,7
FYR Macedonia	0,262	0,510	0,631	5,1	23,5	0,1	0,176	0,249	0,291	0,1
Greece	15,007	24,799	27,194	5,1	9,7	4,1	11,353	13,026	14,726	3,2
Israel	2,803	2,900	3,613	3,6	24,6	0,5	4,369	5,242	6,078	1,3
Italy	43,626	52,372	58,253	3,2	11,2	8,7	34,558	35,859	39,412	8,5
Malta	1,339	1,966	2,274	10,2	15,7	0,3	0,961	1,291	1,535	0,3
Montenegro	1,088	1,662	1,877	6,6	12,9	0,3	0,652	0,824	0,928	0,3
Portugal	6,832 <sup>11</sup>	18,200	21,200	-	16,5	3,2	8,979	12,506	15,253	3,3
San Marino	0,060	0,060	0,078	10,2	31,1	0,0	-	-	-	-
Serbia	0,683	1,281	1,497	13,2	16,8	0,2	0,681	1,026	1,199	0,3
Slovenia	1,869	3,032	3,586	12,0	18,3	0,5	2,274	2,160	2,450	0,5
Spain	52,677	75,315	81,786	10,5	8,6	12,2	46,685	53,908	60,556	13,1
Turkey	31,364	30,289	37,601	-23,3	24,1	5,6	20,123	16,700	20,028	4,3

With the already large and steadily increasing number of international arrivals as well as the popularity of certain tourism destinations, it is easy to understand that “overtourism”<sup>12</sup> is becoming a growing issue. The constant flow of tourism (especially headed to urban destinations) has a significant impact on the affected areas. The growing number of urban

<sup>10</sup> Source: UNWTO TOURISM Highlights, 2018 Edition. <https://www.e-unwto.org/doi/pdf/10.18111/9789284419876>

<sup>11</sup> In case of Portugal, the data from 2010 is not comparable to 2016/2017 due to a change of methodology (2010 refers to foreign guests, 2016/2017 refers to tourist arrivals at the borders).

<sup>12</sup> <http://www2.unwto.org/press-release/2019-03-05/overtourism-new-unwto-report-offers-case-studies-tackle-challenges>

tourists increases the use of natural resources, causes socio-cultural impact and exerts pressure on infrastructure, mobility and other facilities. In order to keep tourism sustainable, smart and integrated, the increasing threat of overtourism and overcrowding makes it necessary to develop new strategies, revise old policies and implement new solutions in this sector.

## 2.2 EXISTING POLICY FRAMEWORK IN THE MED AREA: overview and new developments

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### 2.2.1. Coastal and maritime tourism-related policies overview<sup>13</sup>

In this section, a detailed overview of different European strategies, initiatives and programmes concerning coastal and maritime tourism in the Mediterranean region is conducted. This will comprise an exhaustive analysis of each legal, political and strategic objective of policies and their governance framework and underlying institutional settings.

The following initiatives collect the policies from a general point of view, which means that they are related not just to Coastal and Maritime Tourism but also to Maritime Surveillance. The choice to keep a whole view is to ensure the exhaustivity of the study done on programmes, strategies and so on and to not deplete the analysis developed.

#### EUSAIR

**Outline of the strategy:** The European Strategy for the Adriatic-Ionian Region is a macro-regional strategy adopted by the European Commission and endorsed by the European Council in 2014. It intends to promote sustainable economic and social prosperity for the Adriatic and Ionian water basin and the terrestrial surface areas around it, through growth and job creation. Additional objectives include improving the region's attractiveness, competitiveness and connectivity, whilst preserving the environment and healthy and balanced coastal and marine ecosystems<sup>14</sup>. The strategy brings together states with a shared history and accelerates EU integration for the participating countries and potential candidates for future EU membership, since it includes Instrument for Pre-Accession Assistance countries.

EUSAIR aims to tackle various challenges which the macro-region faces, including socioeconomic disparities in GDP per capita and unemployment, a lack of research-to-business networks, a lack of transport infrastructure, inadequate grid interconnectivity, marine pollution, marine environmental preservation, and insufficient institutional and administrative capacity. Concretely, it focuses on developing existing and new initiatives to:

- Ensure the sustainable use of sea and coasts and coexistence of different economic activities by making all waters under national jurisdiction subject to Maritime Spatial Planning and all coast lines subject to Integrated Coastal Management.

<sup>13</sup> Overview taken from *Outline of a Roadmap to develop synergies among PANORAMED, strategies, initiatives and programmes in the Mediterranean* developed by the WP7 Liaising leader (Region of Crete), currently still under development

<sup>14</sup> EUSAIR. (2018) About EUSAIR. Available at: <https://www.adriatic-ionician.eu/about-eusair/> (accessed 10/2018).

- Adopt and implement multiannual fisheries management plans for all threatened stocks.
- Increase safety and security at sea by monitoring maritime traffic through a single shared system, with a joint contingency plan for oil spills and other large pollution.
- Minimise eutrophication and improve water quality by reducing marine litter, nutrient flows and other pollutants.
- Protect biodiversity by covering at least 10% of seas with Marine Protected Areas.
- Recognise nautical licenses and facilitate visa process to encourage nautical and cruise tourism.
- Increase off-season arrivals by 50% to manage yearly tourist flows sustainably.

**Governance framework:** EUSAIR places stable governance mechanisms at its centre, through the adoption of a multi-regional governance system designed to respect participating countries' institutional architecture and competences, whilst ensuring timely implementation. The interrelated levels of governance are political leadership and ownership, coordination and implementation.

The governance of EUSAIR has operational and political dimensions. Line ministries and implementing bodies set the strategic objectives and monitor their impact, and participating countries' Ministers for EU Funds and/or Foreign Affairs meet annually at the forum's ministerial meetings.

The operational infrastructure is made up of a Governing Board, Thematic Steering Groups and the EUSAIR Facility Point. The Governing Board provides strategic guidance on the management and implementation of the Action Plan and coordinates the Thematic Steering Groups' work. It also acts as an interface between the operational and political levels, reports to the EU-28 High Level Group on macro-regional strategies, proposes revisions to the action plan and selects actions and projects to be included in the action plan. The Thematic Steering Groups are organised by pillar and their role is to develop the criteria for selecting actions and projects within each pillar, to identify potential sources of funding and to submit policy proposals and recommendations to revise the Action Plan. Finally, the EUSAIR Facility Point provides operational and administrative support to both other bodies. It consists of a partnership of project partners from all the participating countries who provide support for the effective and efficient performance of the Action Plan's functions, logistics, attracting promoters and financiers, developing project concepts, supporting the preparation and monitoring of macro-regional actions and boosting the region's visibility.

## WESTMED

**Outline of strategy:** WESTMED is a strategy focusing on the western Mediterranean, addressing the macro-region's need for a joint initiative to increase safety and security, promote sustainable blue growth and jobs, and preserve ecosystems and biodiversity. It seeks to deal with the area's geopolitical instability, worsened by factors such as youth unemployment, the economic and financial crisis, fish stock overexploitation, growing coastal urbanisation, the refugee crisis and marine pollution. WESTMED's goals include the sustainable development of the maritime economy, job creation and the development of a proper governance system; increased

competitiveness and resilience to cyclical crises and shocks; and a healthy marine and coastal ecosystems and socioeconomic development<sup>15</sup>.

WESTMED's vision is to find practical areas of cooperation which will help all the involved countries to achieve sustainable maritime economic development, i.e. blue growth, whilst addressing the major environmental challenges in the sea basin. It intends to reduce the pollution and use of resources of existing economic activities and to promote opportunities for green growth.

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**Governance framework:** The WESTMED initiative is implemented by a consortium of three highly experienced organisations who work with a range of maritime stakeholders from countries bordering the Western Mediterranean Sea basin and are fully aware of the complexity of political governance, socioeconomic and environmental data gathering.

The initiative is led by Ecorys, who has been working on several Blue Growth strategic initiatives in the EU and whose expertise is project coordination, stakeholder consultations, event management and Impact Assessment. Plan Blue provides support through its knowledge and experience in mobilising stakeholder support towards the implementation of sustainable development strategies within the framework of the Barcelona Convention. Finally, SML offers its knowhow in the design of Integrated Maritime Policies and strategies in Mediterranean countries, understanding the political context and accessing sectoral data in important domains for the project.

Political Coordination will be provided through ad hoc Ministerial meetings and the existing mechanisms and processes of the Union for the Mediterranean (UfM): ministerial and Senior Officials' meetings. Operational coordination will come through the WESTMED Steering Committee, the initiative's decision-making body, as well as a WESTMED Task Force, linked to the UfM's Working Group on the Blue Economy, including national focus points from the ministries, the European Commission and the UfM Secretariat. In addition, ad hoc Technical Groups featuring experts and stakeholders may be established to identify and promote the implementation of cooperation projects<sup>16</sup>.

WESTMED is closely tied to the EU's core priorities, "Jobs, growth and investment", "Energy Union and climate change" and "A stronger global actor" by fostering compliance with EU law and improving the policies relating to these areas. This connotes better coordination with the funding instruments and an integrated approach where EU policies and other policy strand are interconnected.

<sup>15</sup> WESTMED. (2016). About the WestMED Maritime Initiative. Available at: <http://www.westmed-initiative.eu/project/> (accessed 11/2018).

<sup>16</sup> European Commission. (2017). Annex 1 – Governance of the Initiative for the Sustainable Development of the Blue Economy in the Western Mediterranean. 30 November 2011. Available at: [https://ec.europa.eu/maritimeaffairs/sites/maritimeaffairs/files/2017-11-30-west-med-declaration-annex\\_en.pdf](https://ec.europa.eu/maritimeaffairs/sites/maritimeaffairs/files/2017-11-30-west-med-declaration-annex_en.pdf) (accessed 11/2018).

## UNEP Map Mediterranean Strategy for Sustainable Development

**Outline of strategy:** The United Nations Environment Programme Mediterranean Action Plan originates from the Convention for the Protection of the Marine Environment and the Coastal Region of the Mediterranean (Barcelona Convention), signed in 1975 and amended in 1995.

It initially focused on assessing and controlling pollution but now envisions integrated coastal zone planning and management as the prime environmental solutions. It seeks to contribute to the region's protection of the marine environment and sustainable development. Its key objectives are the sustainable management of natural marine and land resources to integrate the environment in socioeconomic development; the reduction of pollution to protect the marine environment and coastal zones; the protection of nature and sites of ecological or cultural value; an improvement in quality of life, and an increase in solidarity among Mediterranean states<sup>17</sup>.

**Governance framework:** The MAP system, including the UNEP/MAP Secretariat, its Regional Activity Centres and the Mediterranean Commission on Sustainable Development provides leadership and guidance for the implementation of the strategy. It also provides support and technical guidance to the parties for the Barcelona Convention. The policy represents a coherent and integrated set of priority strategic directions and actions that need to be implemented to achieve sustainable development in the Mediterranean basin, emphasising the need to collaborate with the scientific community and academia, whose research will affect and support decision-making.

## Mediterranean Strategy for Sustainable Development

**Outline of strategy:** MSSD provides a strategic policy framework to secure a sustainable future for the Mediterranean region, adapting international commitments to regional conditions, guiding national strategies and promoting regional cooperation by linking environmental protection to socioeconomic development. Having considered the urban sprawl of big agglomerations and coastal cities, disparities within subregions and intense economic uses as the key pressures for the region, its vision is of "a prosperous and peaceful Mediterranean region in which people enjoy a high quality of life and where sustainable development takes place within the carrying capacity of health ecosystems". It intends to achieve this through common objectives, cooperation, stakeholder investment, solidarity, equity and participatory governance<sup>18</sup>.

**Governance framework:** The Mediterranean Commission on Sustainable Development Secretariat, established within the UNEP/MAP Coordinating Unit, requires at least two

<sup>17</sup> UNEP MAP. (2016). Mediterranean Strategy for Sustainable Development 2016-2025: Investing in Environmental Sustainability to Achieve Social and Economic Development. May 2016. Available at: [http://wedocs.unep.org/bitstream/handle/20.500.11822/7700/-Mediterranean\\_strategy\\_for\\_sustainable\\_development\\_2016-2025\\_Investing\\_in\\_environmental\\_sustainability\\_to\\_achieve\\_social\\_and\\_economic\\_development-20.pdf?sequence=3](http://wedocs.unep.org/bitstream/handle/20.500.11822/7700/-Mediterranean_strategy_for_sustainable_development_2016-2025_Investing_in_environmental_sustainability_to_achieve_social_and_economic_development-20.pdf?sequence=3) (accessed 11/2018).

<sup>18</sup> UNEP MAP. (2005). Mediterranean Strategy for Sustainable Development. A Framework for Environmental Sustainability and Shared Prosperity. 27 June 2005. Available at: [http://mio-ecsde.org/epeaek09/basic\\_docs/unep\\_mssd\\_eng.pdf](http://mio-ecsde.org/epeaek09/basic_docs/unep_mssd_eng.pdf) (accessed 11/2018).



employed officers to focus on the Secretariat role and the formulation and implementation of projects linked to the strategy's implementation.

Since the efficient coordination and capacity-building of relevant stakeholders is necessary to avoid a lack of harmonisation or an excessive simplification of activities, MSSD requires nations to set up sustainable development commissions, councils, and others to achieve wide political support. The strategy envisions a series of national, international and regional actions which can help mitigate the risks posed by these institutional challenges.

Additionally, Plan Bleu monitors the strategy's implementation by examining specific indicators of sustainable development and elaborating detailed factsheets depicting the data on each one of these. They include countries' ecological footprint, international tourism receipts, energy use efficiency or the amount of waste generated.

### Dossier of UFM on Blue Economy

**Outline of strategy:** The Dossier on Blue Economy's objective is to continue shaping the regional blue economy agenda, be a centre for the exchange of information, views and best practices between stakeholders and countries, and to create synergies among initiatives, providing input to future actions and approaches, whilst ensuring previous initiatives are not duplicated. The members have pledged to make the best use of the potential of the blue economy, improve maritime governance and create an environment that is conducive to job creation, innovation and knowledge-based business opportunities in the blue economy<sup>19</sup>.

**Governance framework:** The UfM's governance is based on co-decision and shared responsibility between the two Mediterranean shores and is structured around a working methodology that promotes dynamic interactions among Member States. In order to ensure the co-ownership of decisions, the UfM is chaired by a co-presidency between both shores – since 2012 it is assumed by the EU on the northern side and by Jordan on the southern side.

Members meet regularly in Senior Officials meetings, featuring Ministers of Foreign Affairs, EU institutions and the League of Arab States. These meetings provide the framework to shape the political context and coordinate the work of the Secretariat; they approve the budget and working programme and discuss project proposals that have been submitted for approval and endorsement. Their decisions are taken by consensus.

The UfM Secretariat is the main body responsible for the Dossier's operation. It prepares Ministerial meetings, facilitates regional dialogue platforms and the development of strategic regional projects. The Secretariat is led by the Secretary General and six Deputy Secretary Generals focusing on sectorial divisions. The entire Secretariat team includes over 60 staff members from over 20 countries, including diplomatic and technical personnel seconded by Member States and partner institutions such as the European Commission or the European Investment Bank.

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<sup>19</sup> Union for the Mediterranean. (2017). Blue Economy in the Mediterranean. Available at: [https://ufmsecretariat.org/wp-content/uploads/2017/12/UfMS\\_Blue-Economy\\_Report.pdf](https://ufmsecretariat.org/wp-content/uploads/2017/12/UfMS_Blue-Economy_Report.pdf) (accessed 11/2018).

## BLUEMED

**Outline of strategy:** BLUEMED is an initiative for research and innovation aimed at promoting the blue economy in the Mediterranean basin through cooperation. It is considered the strategy of reference for the Mediterranean countries to collaborate in towards sustainable growth, “blue” job creation, social wellbeing, and a productive Mediterranean.

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BLUEMED identifies the challenges and knowledge gaps, and highlights key topics, including ecosystems, climate change, tourism, observing systems and spatial planning. The BLUEMED platforms, which target a broad range of stakeholders and key players, including national ministers, international organisations, academia, NGOs and the general public, allows for different types of action to be undertaken at different levels in terms of geographical coverage, critical mass, joint funding and coordination of national or regional efforts<sup>20</sup>. BLUEMED’s Strategic Research and Innovation Agenda and its priorities are regularly updated, defined and consolidated.

**Governance framework:** The GSO BLUEMED Working Group was established in the framework of the Euro-Mediterranean Senior Officials Group in Research and Innovation as the key body in the BLUEMED structure. It is co-chaired by the two chairs of the UfM with close support from the UfM and appointed delegates from the Mediterranean countries. It promotes the extension of the initiative and related activities to non-EU UfM countries who are willing to participate. It also facilitates their adoption of BLUEMED, liaises with relevant stakeholders - including public authorities and private organisations -, disseminates BLUEMED achievements in high-level policy events and promotes cooperation and joint actions with the two sub-regional Mediterranean initiatives, the EU strategy for the Adriatic-Ionian Region and the Western Mediterranean Initiative of the European Commission.

The platforms on knowledge, economy, technology and policy, are composed of a Platform Coordinator and one National Pivot for each partner country. The National Pivots can be members of public administrations (e.g., Region of Crete), research institutions (e.g., Athens University of Economics and Business) or stakeholders, and should preferably come from organisations outside the BLUEMED CSA partnership. Moreover, they must be competent in their field, having participated in networks, clusters, projects and/or international organisations. Since they will be the main interface between the Consortium and the national stakeholders, they will play a role in mobilising national stakeholders and carrying their messages, as well as supporting the process of national implementation and assisting to consolidate the SRIA at the Mediterranean level. There may also be National Pivots from EU non-partner countries and non-EU countries, but these will be appointed during projects, with the advice and support of the UfM, following the proposal of the countries and the approval of the Steering Committee.

<sup>20</sup> BLUEMED. (2017). Policy & Strategy. Available at: <http://www.bluedmed-initiative.eu/policy-strategy/> (accessed 11/2018).

## Europe 2020

**Outline of strategy:** Europe 2020 is the EU's agenda for growth and jobs, which focuses on smart, sustainable and inclusive growth to overcome the EU economy's structural weakness, increase its competitiveness and productivity and underpin a sustainable social market economy<sup>21</sup>. Its three key priorities are smart, sustainable and inclusive growth. Through Europe 2020, the EU seeks to develop an economy based on knowledge and innovation, promote a more resource-efficient, greener and more competitive high-employment economy delivering social and territorial cohesion. In order to meet these three mutually reinforcing priorities, the EU has agreed a number of headline targets for 2020 which are measurable, capable of reflecting the diversity of Member States' situations and based on sufficiently reliable data for comparison purposes.

**Governance framework:** Since stronger economic governance is required to deliver the desired results, Europe 2020 will rely on two pillars: the thematic approach which combines priorities and headline targets, as explained previously, and country reporting, helping Member States develop their strategies to return to sustainable growth and public finances. EU-level integrated guidelines will be adopted to cover the scope of the priorities and targets, and country-specific recommendations will be directed to Member States, with policy warnings being issues in the case of an inadequate response. To achieve this, the Europe 2020 and Stability and Growth Pact (SGP) reporting and evaluation will be done simultaneously to bring the means and the aims together, while keeping the instruments and procedures separate and maintaining the integrity of the SGP. Furthermore, the European Systemic Risk Board reports on macro-financial risks regularly, contributing significantly to the overall assessment of the strategy's progress.

The European Council is the key decision-making body, providing the necessary impulses and guidance. Meanwhile, the European Commission monitors its progress, through a yearly report, and assess country reports and stability and convergence programmes. It also facilitates policy exchange and makes the necessary proposals to steer actions and advance the EU flagship initiatives. The European Parliament will be a driving force to mobilise citizens and act as co-legislator on key initiatives. This partnership approach should be extended to all EU committees, national parliaments and national, local and regional authorities and other stakeholders and partners so that everyone is involved in delivering on the vision.

## UN Agenda 2030 Sustainable Development Goals

**Outline of strategy:** The Agenda is the UN's action plan for people, planet and prosperity. It aims at eradicating poverty in all its forms and dimensions and at taking the bold and transformative steps needed to shift the world onto a sustainable and resilient path. The Agenda is a set of 17 broad yet interdependent goals and 169 targets which will help guide States to work towards achieving these overall goals. It also intends to realise the human rights of all and to achieve

<sup>21</sup> European Commission. (2018). Europe 2020 Strategy. Available at: [https://ec.europa.eu/info/business-economy-euro/economic-and-fiscal-policy-coordination/eu-economic-governance-monitoring-prevention-correction/european-semester/framework/europe-2020-strategy\\_en](https://ec.europa.eu/info/business-economy-euro/economic-and-fiscal-policy-coordination/eu-economic-governance-monitoring-prevention-correction/european-semester/framework/europe-2020-strategy_en) (accessed 11/2018).

gender equality and the empowerment of all women and girls. Agenda 2030 integrates three dimensions into its vision of sustainability: the economic, social and environmental.

**Governance framework:** Agenda 2030 was enacted under the umbrella of the United Nations organisation. Achieving the goals will require the same coordination and active participation that their design had. There is currently no governance or monitoring system: it is up to each country to contribute, though exact contributions for each country have not been designated either. National governments were unanimous in adopting the SDGs in the UN General Assembly in September 2015, so they should follow this through with real action that addresses the goals and targets.

As paragraphs 47-48 in Agenda 2030 set out, “Governments have the primary responsibility for follow-up and review, at the national, regional and global levels, in relation to the progress made in implementing the Goals and targets over the coming fifteen years. To support accountability to our citizens, we will provide for systematic follow-up and review at the various levels, as set out in this Agenda and the Addis Ababa Action Agenda. The High-Level Political Forum under the auspices of the General Assembly and the Economic and Social Council will have the central role in overseeing follow-up and review at the global level.”<sup>22</sup> Quality, accessible, timely and reliable disaggregated data will be collected through indicators to measure progress and ensure no one is left behind, especially African countries, least developed countries, landlocked developing countries, small island developing States and middle-income countries.

### 2.2.2. Competences of authorities in Mediterranean countries

In addition to providing an overview of the European initiatives and strategies concerning the PANORAMED WP5 sub-themes, it is equally as important to see the existing policies of the Mediterranean countries regarding this matter. Based on the work of PANORAMED WP9 on Mainstreaming and subsequent verification and amendment of TWG5 tourism experts, the competences of national, regional, county-level, inter-municipal level and local authorities were identified in 12 countries (Albania, Bosnia and Herzegovina, Croatia, Cyprus, France, Greece, Italy, Malta, Montenegro, Portugal, Slovenia and Spain). The following table shows which (PANORAMED WP5 related) areas of intervention are covered by some form of action of the central government or a lower level authority of a country and which areas are potentially in need of more coverage.

<sup>22</sup> General Assembly of the United Nations. (2015). Transforming Our World: the 2030 Agenda for Sustainable Development – Resolution adopted by the General Assembly on 25 September 2015. 21 October 2015. Available at: [http://www.un.org/ga/search/view\\_doc.asp?symbol=A/RES/70/1&Lang=E](http://www.un.org/ga/search/view_doc.asp?symbol=A/RES/70/1&Lang=E) (accessed 11/2018).

6. Table: Competences of national, regional and local authorities<sup>23</sup>

Country		PANORAMED WP5 sub-themes					
		Maritime transport linked to tourism cruises		Integrated coastal and maritime tourism		Innovative and sustainable tourism offerings	
		Centr al	Decentralised	Centr al	Decentralised	Centr al	Decentralised
Level							
Albania	National	X				X	
	Regional						
	County		X		X		X
	Inter-municipal						
	Local				X		X
Bosnia and Herzegovina	National					X	
	Regional					X	X
	County						X
	Inter-municipal						
	Local						X
Croatia	National	X				X	
	Regional						
	County		X		X		X
	Inter-municipal						
	Local				X		X
Cyprus	National	X		X		X	
	Regional						
	County				X		X
	Inter-municipal						
	Local				X		X
France	National					X	
	Regional					X	X
	County				X		X
	Inter-municipal						X
	Local		X		X		X
Greece	National	X		X	X	X	
	Regional				X		X
	County						
	Inter-municipal						
	Local		X		X		X
Italy	National					X	
	Regional						X
	County				X		X
	Inter-municipal						
	Local				X		X
Malta	National	X				X	
	Regional						
	County						
	Inter-municipal						
	Local						X

<sup>23</sup> Source: Competences of national, regional and local authorities according to PANORAMED thematic priorities by PANORAMED WP9

Montenegro	National					X	
	Regional						
	County						
	Inter-municipal						
	Local						X
Portugal	National	X		X	X	X	X
	Regional						
	County		X		X		X
	Inter-municipal		X				X
	Local						X
Slovenia	National			X		X	
	Regional						
	County						
	Inter-municipal						
	Local						X
Spain	National	X		X		X	
	Regional		X		X		X
	County						
	Inter-municipal		X		X		X
	Local		X		X		X

The matrix shows a strong favour for national and local level competences - across all 12 countries, every one of them has some form of national (26 areas combined) and local (22 areas combined) policy or other action related to three sub-themes. Lower-medium level actions lag behind the higher-medium ones, with 12 instances of regional regulation in 6 countries; 13 county-level competences in 6 countries and only 5 areas of inter-municipal policies in only 3 countries. There are several probable reasons for this, including the overall size of the individual country to the size and importance of the coastal area as well as the differences in administrative division and levels of legislation.

Regarding centralised versus decentralised competences, more than twice as many (53) cases of decentralised actions were identified as opposed to 25 cases of centralised policies. Not surprisingly almost all national (and a few regional) levels of regulations came from the central governments while county- and lower level actions came exclusively from decentralised organisations.

Out of the three PANORAMED WP5 sub-themes, “Innovative and sustainable tourism offers” is the most regulated with 42 different levels covered across all 12 countries. “Integrated coastal and maritime tourism” comes second with 23 areas of actions across 8 countries, and finally “Maritime transport linked to tourism cruises” appears in 7 countries with 13 regulated areas. This clearly shows a favour for a broader regulation of tourism versus the specifically coastal/maritime tourism issues. Also, in many cases, the same competences and responsibilities apply to more than one thematic priority. Specifically, Integrated coastal and maritime tourism and Innovative and sustainable tourism offering competences are shared in multiple countries, especially on a medium- (usually county) or local level.

A short overview of the individual countries:



## Albania

Albania has well-balanced regulation across all three thematic priorities on a national, county and local level. No regional or inter-municipal level competences are listed, instead counties cover any responsibilities that are between national and local level.

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**Maritime transport linked to tourism cruises:** on a national level, the central government (Ministry of Transport and Infrastructure) is responsible for the preparation and implementation of overall transport-related policies, including maritime transport. On county level, the decentralised administration of any given county is responsible for transport infrastructure and the division of national funds. No other medium or local level competencies linked to maritime transport were identified. The National Strategy for the Sustainable Development of Tourism 2019-2022 is a product of the Albanian Government, drafted and consulted by the Ministry of Tourism and Environment.

**Integrated coastal and maritime tourism:** there are no national levels and no central governmental responsibilities listed, only decentralised county and local authority competences. Regional Councils (as the second level of local governance) provide forums to address issues related to tourism activities and act as intermediaries and foster cooperation between the ministry and the local governments. Local authorities keep an inventory on main tourist resources and tourism businesses and provide support for infrastructure and business activities at a local level while also ensuring their compliance with the legislation. They contribute to the diversification of tourism products and provide information for tourism statistics. A forum called Consultancy Council was established in January 2017 as a way for the Government to facilitate the communication and interaction between central and local governments in all fields. This Council gives special attention to maritime tourism and environment in the coastal zones.

**Innovative and sustainable tourism offerings:** on a national level, the central government (Ministry of Tourism and Environment) is responsible for the overall policy, while counties and local authorities share competences with those of the integrated coastal and maritime tourism priority.

## Bosnia and Herzegovina

When listing the competences of authorities in Bosnia and Herzegovina, it is readily apparent that there are no specific competencies listed for maritime transport or the integrated coastal and maritime tourism-related issues. Most likely, all tourism related competences are not separated into specific categories. Another important thing to note is that because the country consists of two entities (Republika Srpska and the Federation of Bosnia and Herzegovina) and District of Brčko, while centralised national level competences exist, decentralised regional-, county- and local level competences play a very important role in the sector of tourism.

**Maritime transport linked to tourism cruises:** no specific competencies listed for this priority.

**Integrated coastal and maritime tourism:** no specific competencies listed for this priority.

**Innovative and sustainable tourism offerings:** on a national and regional level, the Ministry of Foreign Trade and Economic Relations as a centralised organisation is responsible for the general principles of the overall policy and for the coordination between the two entities' authorities and institutions. On regional and county levels, the Federal Ministry of Environment and Tourism (Federation of Bosnia and Herzegovina) and the Ministry for Trade and Tourism (Republika Srpska) are the two most relevant authorities. They are responsible for tourism related issues in their own areas shared with their municipalities as well as monitoring the flow of tourism and directing and proposing measures for tourism development. On a local level, the municipalities share the duties with their respective ministries, and are responsible for issues delegated to them.

## Croatia

Croatia has well-balanced regulation across all three thematic priorities on a national, county and local level. No regional or inter-municipal level competences are listed, instead counties cover any responsibilities that are between national and local level.

**Maritime transport linked to tourism cruises:** on a national level the central government (Ministry of Maritime Affairs, Transport and Infrastructure) is responsible for the legislation and regulation concerning all transportation including national traffic infrastructure and state-lines in maritime transportation. As part of the decentralised administration, county authorities are responsible for regional transport and traffic infrastructure and the regulation of county lines in maritime transportation. No local competences listed for this thematic priority.

**Integrated coastal and maritime tourism:** no centralised or national level competencies listed for this priority. On a county level, county authorities are responsible for tourism promotion and the establishment of the county tourist communities. On a local level, local authorities have similar responsibilities, including local tourism promotion and the establishment of local tourist communities as well as the improvement of the local tourism architecture and cooperation with the local tourist communities.

**Innovative and sustainable tourism offerings:** on a national level the central government (Ministry of Tourism) is responsible for the overall tourism-related legislation as well as the regulation of standards, the promotion of tourism and the establishment of the Croatian tourist community. The Ministry is responsible for the Tourism Development Strategy until 2020 including its implementation. The Ministry also identifies tourism market opportunities and participates in tourism product development and investments. On a local level, local authorities have similar responsibilities, including local tourism promotion and the establishment of local tourist communities as well as the improvement of the local tourism architecture and cooperation with the local tourist communities.

## Cyprus

Cyprus has well-balanced regulation across all three thematic priorities on a national, county and local level. No regional or inter-municipal level competences are listed, instead counties cover any responsibilities that are between national and local level. All national level competences fall under the Ministry of Commerce, Industry and Tourism, sharing responsibilities for all three priorities. County and local competences are shared between the Integrated coastal and maritime tourism and the Innovative and sustainable tourism offerings priorities.

**Maritime transport linked to tourism cruises:** only centralised, national level competences listed. The Ministry of Commerce, Industry and Tourism is responsible for formulating and implementing overall policies and legislation in the field of tourism; with a unit dedicated to nautical tourism involved in promoting and coordinating the development of marinas.

**Integrated coastal and maritime tourism:** on a national level, the central government (the Ministry of Commerce, Industry and Tourism) is responsible for formulating and implementing overall policies and legislation in the field of tourism; with a unit dedicated to nautical tourism involved in promoting and coordinating the development of marinas. On a decentralised / county level the offices of the Cyprus Tourism Organisation located in 13 different cities and areas across the island have relevant authorities. At a local level, local authorities (both municipalities and communities) are responsible for promoting their towns as tourist destinations. Large municipalities employ full time tourist officers, and in some areas several municipalities and communities unite in-common tourist associations to promote their area or district.

**Innovative and sustainable tourism offerings:** on a national level, the central government (the Ministry of Commerce, Industry and Tourism) is responsible for formulating and implementing overall policies and legislation in the field of tourism; with a unit dedicated to nautical tourism involved in promoting and coordinating the development of marinas. On a decentralised / county level the offices of the Cyprus Tourism Organisation located in 13 different cities and areas across the island have relevant authorities. At a local level, local authorities (both municipalities and communities) are responsible for promoting their towns as tourist destinations. Large municipalities employ full time tourist officers, and in some areas several municipalities and communities unite in common tourist associations to promote their area or district.

## France

For France, the Maritime transport priority only has a single local competence listed and the Integrated coastal and maritime tourism also has only a few county and local level competences,

shared with the Innovative and sustainable tourism priority; which in turn has a wide array listed, including some of the few instances of regional and inter-municipal responsibilities.

**Maritime transport linked to tourism cruises:** municipal authorities are responsible for the management of yachts and licensing at a local level.

**Integrated coastal and maritime tourism:** at a county level, tourism departmental authorities are responsible for the promotion and marketing of tourism offers together with local partners as well as the definition of the departmental plan on tourism, taking regional orientations into account. On a local level, municipal authorities are responsible for tourism offices, including the reception and informing of tourists; and tourism promotion in coordination with the regional and departmental committees.

**Innovative and sustainable tourism offerings:** on a national level, the central government (Ministry of European and Foreign Affairs) is responsible for the definition and implementation of tourism policy; the definition and management of promotional operations and the definition and implementation of international cooperation relating to tourism. On a centralised but regional level, the Prefect of a region oversees animating and coordinating public policies including economic and social development, territorial development and planning. Decentralised regional authorities are responsible for defining medium-term objectives of regional tourism development. They share jurisdiction with national level bodies in the tourism sector. At a county level, tourism departmental authorities are responsible for the promotion and marketing of tourism offers together with local partners as well as the definition of the departmental plan on tourism, taking regional orientations into account. Intermunicipalities oversee the promotion of tourism and management of tourism agencies. On a local level, municipal authorities are responsible for tourism offices, including the reception and informing of tourists; and tourism promotion in coordination with the regional and departmental committees.

## Greece

Greece is one of the few of the listed countries where (due to the country's administrative division) there are no county-level competences, instead the three levels comparable with most other MED countries (save for the largest and smallest) here are national, regional and local. The shared competences between the Integrated coastal and maritime tourism and the Innovative and sustainable tourism offers also make an appearance here on the regional and local levels.

**Maritime transport linked to tourism cruises:** on a national level, the central government (Ministry of Maritime Affairs and Insular policy) is responsible for attracting investments in the sector as well as planning and implementing measures and programmes to promote the development of maritime tourism and transport. The Ministry has the competences for the design, development and implementation of national cruise port policy, the provision of cruise port services and the monitoring of developments related to the European and international

institutional framework. It is also responsible for the registry of yachts. Other governmental responsibilities are at the Ministry of Tourism, which oversees the location and spatial planning of maritime infrastructure, the legislation and licensing of tourist ports (excluding cruise ports) and collection and process of data regarding tourist ports, cruising and yachting. The same ministry is responsible for yachting ports. At a local level, the ports' management is done by public or semi-private managing authorities.

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**Integrated coastal and maritime tourism:** on a national level, the central government (Ministry of Tourism) is responsible for the planning and development of tourism policy as well as the development of maritime tourism through tourism spatial planning. The Greek National Tourism Organisation organizes, develops and promotes tourism in Greece, enhancing its value in cooperation with the industry and all stakeholders. Regional authorities are responsible for the drafting and implementation of programmes for tourist planning and promotion to enhance the flow of tourism and promote their regions, with a great emphasis on coastal and maritime tourism. Municipal authorities are responsible for the implementation of or participation in programmes for tourism development and the promotion of special tourism products. They exercise the necessary competences to ensure the effective operation of tourism businesses as well as meeting the tourists demands and expectations.

**Innovative and sustainable tourism offerings:** competences are shared with that of the Integrated coastal and maritime tourism thematic priority.

## Italy

Italy has no competences listed regarding the Maritime transport linked to tourism cruises priority. Regarding the Integrated coastal and maritime tourism, only county and local level competences are relevant, and they are shared with those of the third priority, which in turn is well regulated on a national, regional county and local level.

**Maritime transport linked to tourism cruises:** no specific competencies listed for this priority.

**Integrated coastal and maritime tourism:** on a county level, provincial authorities are responsible for competences conferred by the Regions, including the listing of tourism structures, activities and services, providing technical assistance to stakeholders, fostering initiatives for tourism and promoting and coordinating activities of provincial interest. On a local level, municipal authorities are responsible for local tourism.

**Innovative and sustainable tourism offerings:** on a national level, the central government (Ministry of cultural goods and activities & Tourism) is responsible for setting the principles and objectives for the promotion and development of the tourism policy together with the Regions, as well as promoting Italian tourism abroad and monitoring it. The Ministry coordinates the inter-sectoral state competences related to tourism and co-funds regional and inter-regional programmes of national interest. Regional authorities cooperate with the Ministry in setting the principles and objectives for promotion and development. They serve administrative functions

relating to any public or private activity relating to tourism, and they regulate standards in tourism. On a county level, provincial authorities are responsible for competences conferred by the Regions, including the listing of tourism structures, activities and services, providing technical assistance to stakeholders, fostering initiatives for tourism and promoting and coordinating activities of provincial interest. On a local level, municipal authorities are responsible for local tourism.

## Malta

In Malta's case as well, only the Innovative and sustainable tourism offerings priority has any relevant competences listed. Presumably due to the country's small size, most of the responsibilities are on a centralised / national level with only a few of them shared with local authorities.

**Maritime transport linked to tourism cruises:** no specific competencies listed for this priority.

**Integrated coastal and maritime tourism:** no specific competencies listed for this priority.

**Innovative and sustainable tourism offerings:** on a national level the central government (Ministry for Tourism) is responsible for the promotion of tourism, the regulation of tourism services and operations and the planning and development of the tourism industry and the necessary infrastructure. The Malta Tourism Authority oversees creating and fostering relationships with tourism stakeholders as well as advising the government on tourism operations and improving human resources in the industry. On a local level, Local Councils are responsible for providing information relating to tourist facilities (shared with the central administration).

## Montenegro

One of the lower populated countries here, Montenegro shows similar division of competences to other countries with smaller populations (e.g. Malta). Only the Innovative and sustainable tourism offering priority has relevant competences with national and local level responsibilities tied to it, although in Montenegro's case there are more local competences.

**Maritime transport linked to tourism cruises:** no specific competencies listed for this priority.

**Integrated coastal and maritime tourism:** no specific competencies listed for this priority.

**Innovative and sustainable tourism offerings:** on a national level, the central government (Ministry of Sustainable Development and Tourism) is responsible for establishing overall legislation, policies and strategies. The Ministry oversees international and national promotion, tourism standards and infrastructure; issues licenses and regulates conditions for winter and nautical tourism. On a local level, municipalities are responsible for developing and maintaining



tourism services and issuing permits, coordinating tourism development and the production of relevant programmes. They provide guidance and coordination for activities of tourism service providers.

## Portugal

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In Portugal, the competences in the field of tourism are distributed mainly by 3 levels of the administrative organization: national, regional and municipal.

At the national level, the government has legislative powers and regulates the tourism activities both in a centralized and decentralized manner. With regard to the decentralization of competences, those exercised by the regional tourism entities mainly concern product structuring and tourism promotion in articulation with the National Tourism Authority.

There are also two regions with administrative and financial autonomy - Madeira and the Azores - that have competences that apply specifically in each of the regions.

The municipalities (i.e. the local or county level) have competences that aim at the valorisation and promotion of the tourist assets of their territory.

**Maritime transport linked to tourism cruises:** the legal frame for maritime transport is defined at a national level, and the National Authority in Tourism has the competence to define the strategic view for cruise tourism and its international promotion. Still in a national level but in a decentralized way, the regional tourism entities have competences for the product structuring and the tourism promotion.

Everything concerning port policies is defined on a national level even though the municipalities have delegated competences by the national level.

**Integrated coastal and maritime tourism:** on a national level, the National Tourism Authority is responsible for the promotion of an appropriate planning policy and of product/offer structuring, intervening in the preparation of instruments of territorial management and participating in the licensing or authorization of projects and activities.

Because of the country's administrative division, on a regional level due to the administrative and financial autonomy the regional governments of Madeira Autonomous Region and the Azores Autonomous Region legislate specifically for those regions. Meaning that tourism planning product/offer structuring policy, international promotion is under their direct responsibility.

Regional autonomy is always linked to the fulfilment of the fundamental law of the Republic, the Constitution Law of the Portuguese Republic.

**Innovative and sustainable tourism offerings:** on a national level, the central government (Ministry of Economy through the State Secretary for Tourism) is responsible to develop public

policies for the enhancement and improvement of tourism products and destinations, the training and qualification of human resources, the promotion of tourism, supporting investments to the sector and providing tourist information. The National Tourism Authority – Turismo de Portugal is responsible for the framework and implementation of these policies. In a decentralized way, regional tourism entities also develop these competences at the regional level and in articulation with the national tourism authority

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Intermunicipal communities are responsible for promoting the planning and management of the economic, social and environmental development strategy of their communities' territory, the articulation of municipal investments and participation in the management of programs to support regional development.

On a local level, municipal authorities are responsible for creating tourist institutions and participating in the promotion of the local tourism and participating in the work of the regional tourism bodies.

Regional authorities of the Azores Autonomous Region (Regional Secretariat for Energy, Environment and Tourism) are responsible for coordinating all the actions in the implementation of the objectives of the policy defined for the sector; encouraging the use and preservation of the tourist resources of the Region; the promotion or support the actions undertaken in the framework of the regional tourist offers and collaboration with all regional, national or international services and bodies on all matters of interest to the tourism sector. In the Madeira Autonomous Region (Regional Secretariat for Tourism and Culture) the regional authorities are responsible for the promotion and development, within the framework of the strategic guidelines applicable to the tourism sector and the respective action plans, measures favourable to the competitiveness of the regional tourist supply, at national and international level; participation in defining the strategy of promotion of the Region as a tourist destination, its brands and products, coordinating the dynamization of promotional actions; planning, coordination and development a program of events, streamlining the issues arising from the annual calendar and promoting a diversification of events associated with Madeira's tourism products.

## Slovenia

Similarly to the other relatively smaller countries on this list, only the Innovative and sustainable tourism offerings priority has relevant competences listed for Slovenia, and only on a central / national and decentralised / local level.

**Maritime transport linked to tourism cruises:** no specific competencies listed for this priority.

**Integrated coastal and maritime tourism:** no specific competencies listed for this priority.

**Innovative and sustainable tourism offerings:** on a national level the central government (Ministry of Economic Development and Technology) is responsible for the preparation,

drafting, coordination, implementation and monitoring of implementation of tourism policy and legislation; the guidance and supervision of the activities promoting Slovenian tourism in domestic and foreign markets; the participation in international tourism related organisations and groups; drafting proposals for bilateral agreements in the field of tourism and coordination of their implementation; cooperation and inter-ministerial coordination in the field of tourism and catering; management of administrative procedures in the field of tourism and catering, including determining status for operation of public interest in the field of tourism, as well as delineated tourist areas for gaming activities; participating in drafting the budget and financial statement of the budget for items relating to the Directorate for Tourism; formulating, participating in and implementing the cohesion policy (structural funds – ERDF, INTERREG, etc.) in the field of tourism, and encouraging investment in tourism infrastructures. The Slovenian Tourist Board (STB) is a national tourist board that plans and carries out the marketing of Slovenia's comprehensive tourist offer in foreign markets and ensures the sustainable development of Slovenian tourism. On a local level, local authorities are responsible for creating the conditions for the economic development of the municipality and carrying out tasks in the areas of catering, tourism and agriculture.

## Spain

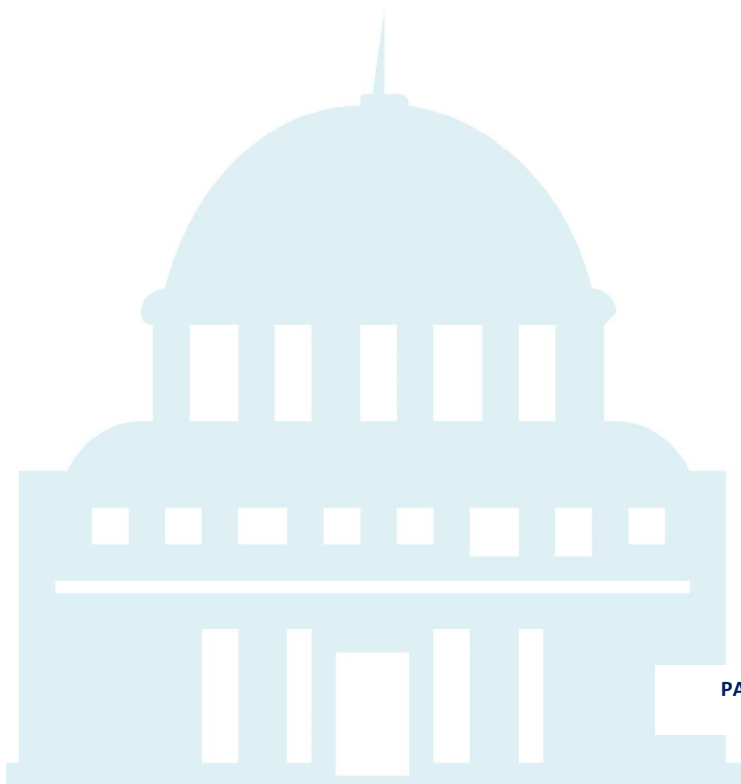
Out of the 12 countries listed, Spain has the most levels of competences covered across all three priorities. Due to the country's size and the administrative division (especially because of the Autonomous Communities), no county-level competences appear, instead regional and inter-municipal competences supplement national and local ones. As with almost all other countries, national and central government competences are synonymous with all other levels belonging to the decentralised administration. The listed competences are shared between the different priorities, especially among the Integrated coastal and maritime tourism and Innovative and sustainable tourism offering competences.

**Maritime transport linked to tourism cruises:** on a national level, the central government is responsible for the international promotion of tourism in Spain and issuing university degrees in the field of tourism. More specific competences for this priority include the overseeing of cruise ship shipping, internal and external transit of tourists in cruises, ports, the environmental protection of the coastal zone and maritime surveillance and rescue. On a regional level, Autonomous Communities are in charge of tourism promotion and the national and international development of tourism in the corresponding regions. They provide a general plan of tourism in the regional area as well as strategic frameworks for resource management and tourism activities. They manage tourism offices and tourist information points and regulate tourist guides. Autonomous Communities oversee ports with no direct state management, the transport of persons within the regional territories and provide protection and surveillance. On an inter-municipal level, provincial authorities provide information and promotion of tourist activities in their areas as well as coordinating tourist activities in the province. Local authorities provide information and promotion of the tourist activities in the local area, issue licences for

the opening of establishments for activities in the coastal area as well as surveillance and protection.

**Integrated coastal and maritime tourism:** most competences are shared with the Maritime transport thematic priority. More specific competences for this priority include the managing of public assets and goods on the shores and adjacent waters; Autonomous Communities are also involved in the tourist plans for the major cities. They are also in charge of the evaluation of the environmental impact of various tourism models and of the creation of centres for the immigrant attention.

**Innovative and sustainable tourism offerings:** competences are shared with the Integrated coastal and maritime tourism thematic priority.



### 3. IDENTIFYING GAPS AND GROWTH OPPORTUNITIES

#### 3.1 EVIDENCES FROM PROJECTS IMPLEMENTED/BEING IMPLEMENTED

##### METHODOLOGY USED

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The desk and field analysis carried out for identifying the gaps and growth opportunities followed the methodology guidelines developed for PANORAMED<sup>24</sup>. The major steps of this process are described in the following sections.

##### Data extraction:

Projects relevant for the PANORAMED WP5 Coastal and Maritime Tourism strategic theme were extracted from project databases (e.g. KEEP database for transnational and cross-border Interreg projects) via the use of keywords, selected by the tourism experts of the Transnational Working Group on Coastal and Maritime Tourism (TWG5), coming from various PANORAMED countries. The output was a large sample of around 100 projects, manually narrowed down to 85, as a consequence of a more focused inspection. The eliminated projects were labelled as irrelevant.

##### Selection of projects relevant to the strategic theme:

The Project selection criteria were defined to select the most relevant projects for the strategic themes. The selection criteria included the coherence of themes, the stage of implementation for the 2014-2020 period (finished; or ongoing, but finishing before the end of period), number of countries involved (the higher the better), number of partners involved (the higher the better) and number of institutional partners involved (the higher the better). Applying these criteria, the original sample of 85 was narrowed down to 62 projects for further analysis (removing projects incoherent with PANORAMED, not relevant projects and projects more coherent with PANORAMED WP6), with 3 horizontal projects added, ending with 65 projects pre-selected for the next steps (data collection). All of the selected projects were either already closed projects referring to the 2007-2013 funding period (e.g. Transnational Interreg Med 2007-2013, IPA Adriatic CBC 2007-2013 or ENPI CBC MED SEA BASIN 2007-2013) or finished/ongoing projects referring to the 2014-2020 funding period (e.g. Transnational Interreg Med 2014-2020, EASME-EMFF 2014-2020).

##### Data collection (desk):

To prepare for a field analysis, data was collected and organized for all 65 selected projects from available relevant sources (project websites, project application forms, project reports, etc.) and put in a project sheet template created specifically for this purpose. For each project, a set of interview questions was prepared to account for any relevant information that was not readily available via the desk research or needed additional clarification.

##### Data collection (field):

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<sup>24</sup> "Methodologies for data collection and for evaluating project results (final version)" – Region Emilia-Romagna / ERVET

During the organization of the field analysis, contacts were attempted with the project leaders of the 65 selected projects in order to carry out interviews. Since several projects had already been closed for years, while in some cases the persons responsible for the project were no longer available, the final percentage of interviews obtained was about 66% of the sample, corresponding to 43 projects. The interviews were used to identify the outputs and the results of the projects related to the PANORAMED WP5 Coastal and Maritime Tourism strategic theme and to assess their relevance to it. The information collected through the interviews were then inserted in the Project Results Collection Matrix (further in text: PRCM) which serves as one of the bases for many key documents of the PANORAMED WP5 Coastal and Maritime Tourism strategic theme, including this report. The PRCM gives a short overview of the included projects, listing their main outputs and significant impacts as well as ranking them according to their relevance to the strategic theme. For each project, the PRCM shows its significance to the theme of sustainable tourism in 5 different areas: social, environmental, economic, governance and cultural, and on a five-level Likert scale where 1 is equivalent to “Not of interest/Not relevant” and 5 is equivalent to “Very relevant/Important”, based on the context. The PRCM also describes and evaluates the projects relevance in other sub-themes (Liaising and governance, Integration and mainstreaming, Innovation, Direct and indirect investments), where applicable, using the same Likert-scale. It is important to note that the ratings do not evaluate the importance or the success of any given project, but only the relevance or importance of their results to the PANORAMED WP5 Coastal and Maritime Tourism strategic theme.

### Field analysis methodology and overview of the analysed projects

The broad objective of the field analysis was to learn from previous projects experience, focusing on key issues related to the Programme by making them explicit in the questionnaire prepared by WP4 Leader and used in this analysis.

The questionnaire, all composed of open questions, is organised in the following sections:

- Project context
- Project assumptions, results and outputs
- Migration
- Mainstreaming
- Liaising
- Innovation
- Sustainability

The survey adopts a qualitative approach.

First, the project sample is not statistical, as it is a relatively small sample and projects for the interviews have been selected only on relevance criteria (programmes, size, partnership and coherence with PANORAMED WP5) and not in a random way.

Second, the information collected is mainly qualitative. This aspect reflects in the analysis, which is qualitative as well, and it is based on a conceptual clustering and focused on learning models and lessons learnt.

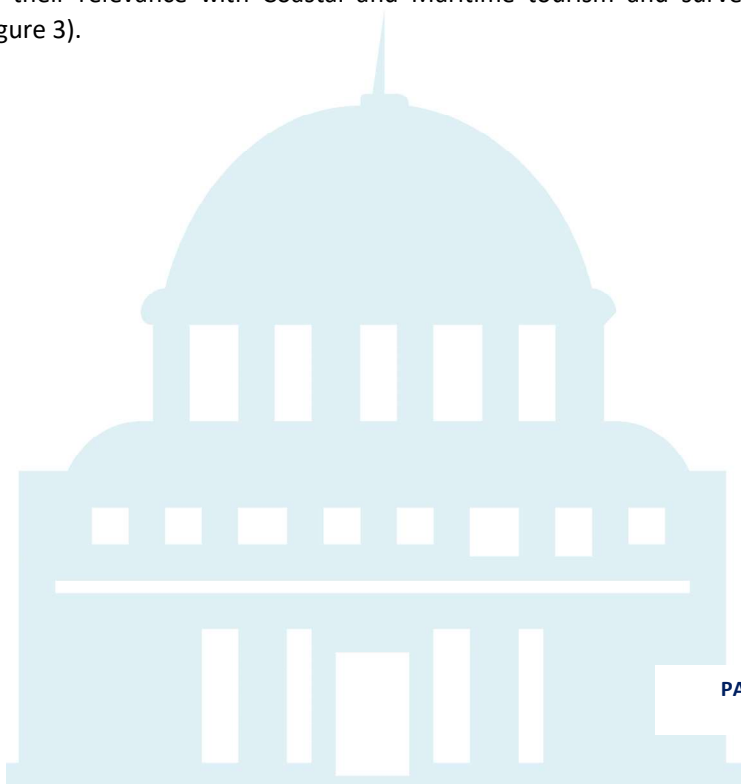
Before examining the results of this analysis, some limits must be underlined. First, the interviewees involved the lead partners, and while this does not necessarily create a bias in the way the project history or the project situation (if it is an ongoing project) get interpreted, it may simply happen that the interviewed person might have a partial knowledge of the project, mainly referred to the activities, the results and the impacts directly and mainly related to the lead partner. For instance, the interviewed person may ignore the mainstreaming, or the impact occurred at local or regional level elsewhere in a partner territory. Second, given that some projects have been completed several years ago, the memory of the project faded in the mind of the interviewed person. In some cases, the impossibility or the difficulty for interviewing was indeed due to the long time passed since the project's end (i.e. project staff not working anymore in the beneficiary institution).

Out of the successfully interviewed projects the Croatian and the Tuscan team surveyed, respectively 16 and 27 projects, 43 in total.

Prior to the field analysis, projects have been selected considering their relevance with the WP5 of PANORAMED and the funding programme. The programmes chosen, all related to transnational and cross-border cooperation in the Mediterranean and most of them to Interreg MED, were the following:

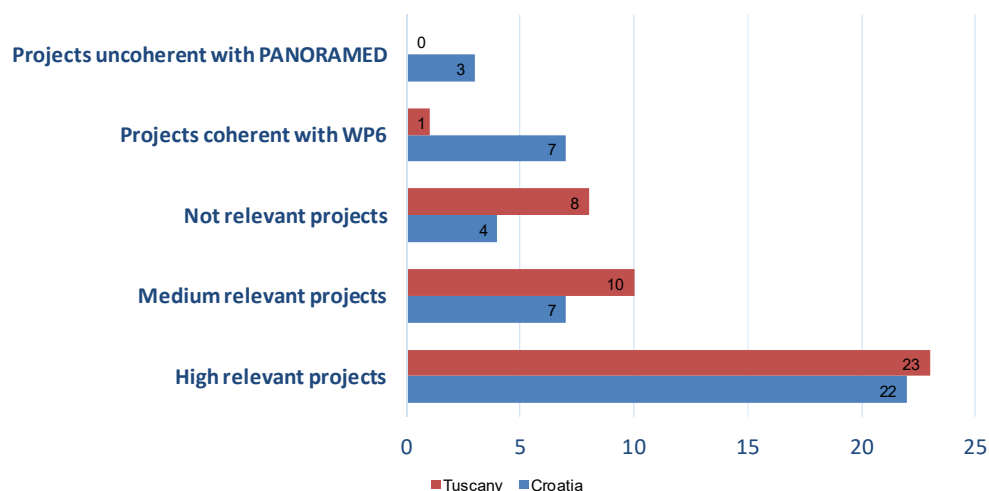
- EASME – EMFF (2014-2020)
- ENPI CBC MED SEA BASIN (2007-2013)
- INTERREG Europe
- INTERREG Med Southeast
- INTERREG South West Europe (2014-2020)
- IPA ADRIATIC (2007-2013).
- Transnational INTERREG Med (2007-2013)
- Transnational INTERREG Med (2014-2020)

3 out of 8 Horizontal Projects (*PANACeA*, *GO SUMP* and *BleuTourMed*) were also added to the field analysis for their relevance with Coastal and Maritime tourism and surveyed by the Croatian team (figure 3).



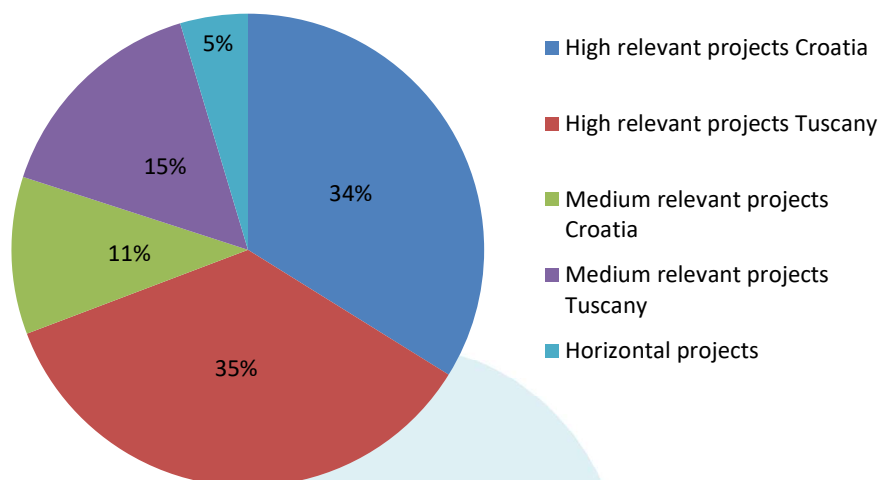


1. Figure: Projects examined and selected (medium and high relevant) in WP5 by Tuscany and Croatia



As a result of this selection the 65 projects (62 medium and high relevance + 3 horizontal projects) displayed the following composition (Figure 4):

2. Figure: The 65 projects selected for the field analysis by degree of relevance and partner's responsibility for the survey - % composition



The 27 projects surveyed by the Tuscan team fell under the Programmes selected and displayed a slight bias in favour of the previous programming period (2007-2013) over the current one (2014-2020): 17 projects (2007 - 2013 ENPI CBC MED Sea Basin, 2007 - 2013 INTERREG MED, 2007 - 2013 South East Europe) over 10 in the other programmes (2014 - 2020 INTERREG MED, EASME/EMFF, INTERREG Europe).

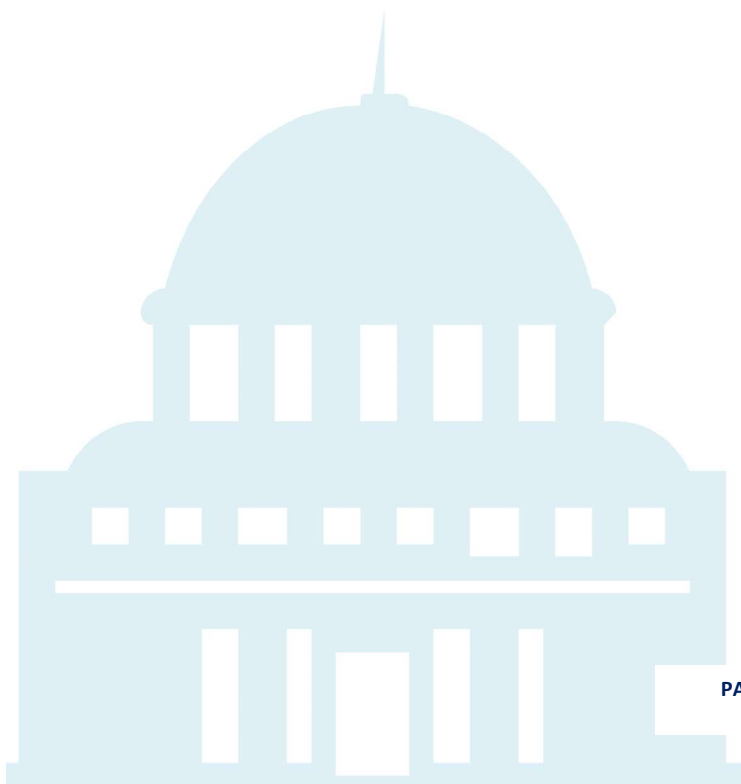
There is a strong prevalence of Italian-led projects, which is explained by the size and the role of this country in the Mediterranean.

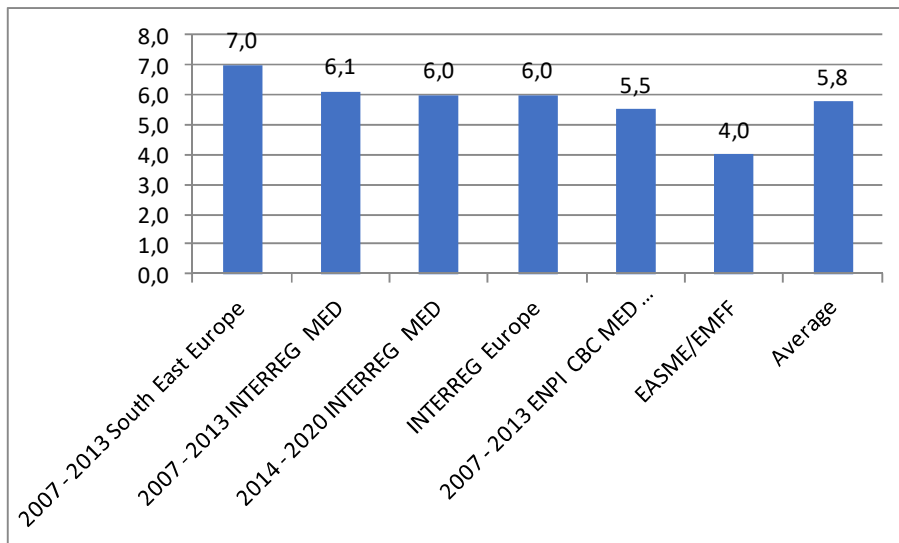
The projects surveyed by the Croatian team show a slight bias for the programming period 2014-2020, as 9 projects referred to 2014-2020 programmes (mostly Transnational INTERREG MED 2014-2020 and South West 2014-2020)) and 7 to earlier initiatives (INTERREG MED 2007-2013, IPA Adriatic 2007-2013). Frequently projects were led by a Spanish partner (6 projects in total), once again due to the country size and role. The other project leads represented 7 different countries (Croatia, Cyprus, France, Greece, Israel, Macedonia and Slovenia).

Overall, the cumulated budget of the surveyed projects amounts to over 105 million €, which also means, on average, a significant financial dimension of the projects. There is no appreciable systematic difference between the projects belonging to the previous programming period: other than a few outliers, project sizes were similar in both periods.

In general, the relatively large size of the projects is the result of the selection process, aimed at focusing on those projects with a wider partnership, and, possibly, with a significant impact, which, in turn, may be influenced by the financial dimension of the action.

A wide and transnational partnership is a characteristic of the Programs selected and it is reflected in the projects too: on an average, each project has involved 5.8 countries, with slight variations across programs (Figure 5).



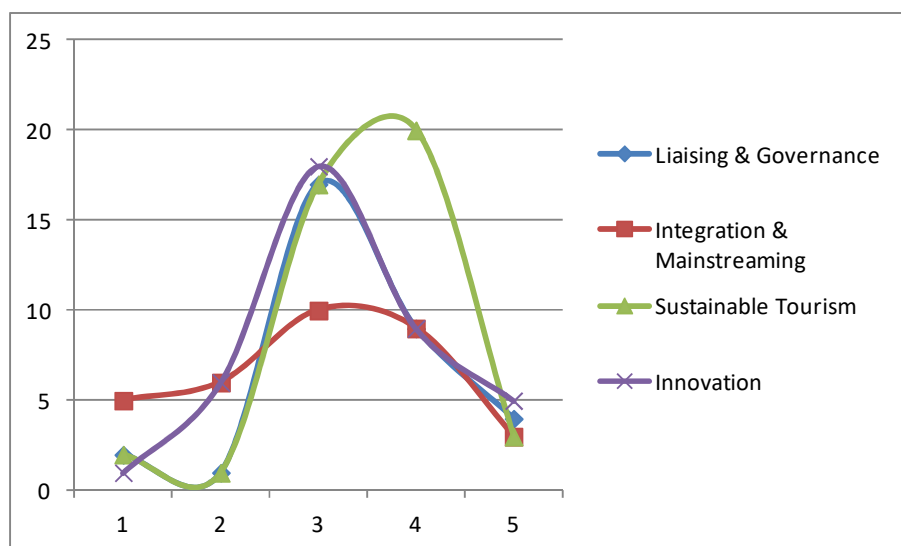




Governance, Integration & Mainstreaming) which, for the purpose of analysing and clustering the projects, have been ranked, from 1 (minimum) to 5 (maximum). In the field survey sustainable tourism was the main core specific theme and it got a significant ranking with most projects reaching level 4 (20 out of 43) or 3 (17). Innovation and other themes such as liaising and governance, which in PANORAMED are treated as Cross-cutting Themes (CCTs), got a lower –but still good– ranking: in this case the prevailing level was 3. A slightly weaker evaluation was reached by Integration and Mainstreaming (also a CCT). These results are presented in figure 8.

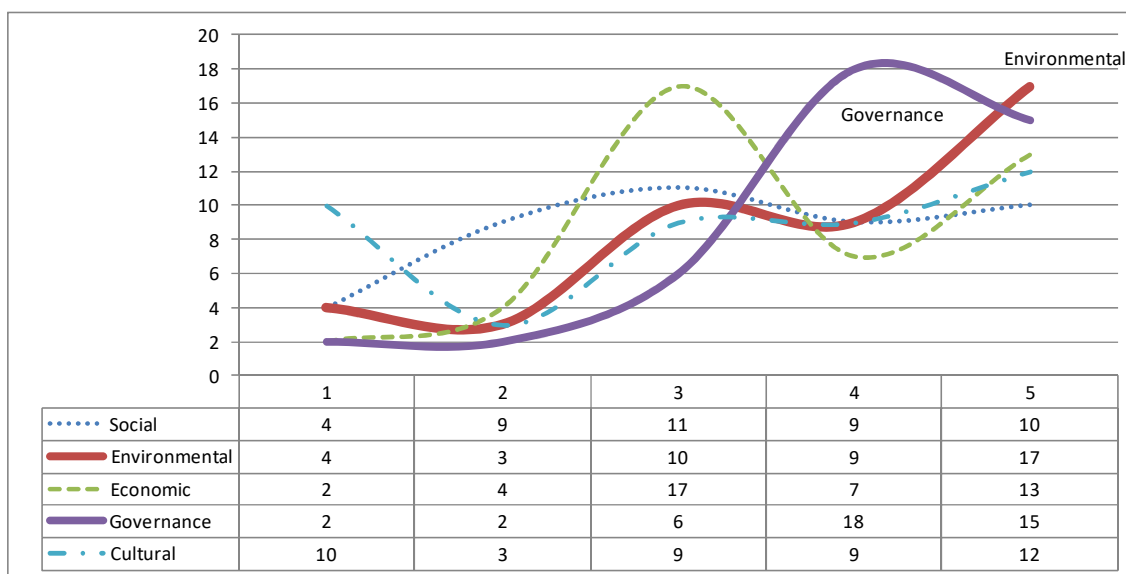
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6. Figure: Ranking of key issues in the surveyed projects - frequency (1=minimum; 5=maximum)



Going deeper into the specific dimensions of sustainable development, it can be observed that the environmental and governance aspects are the most significant ones – and this is also reflected in their higher ranking, though most projects are based on an ‘holistic’ approach to development and take into consideration, at the same time, all dimensions of sustainable tourism, including cultural, economic and social ones, as showed in figure 9.

7. Figure: Ranking of sustainable development dimensions in the surveyed projects - frequency (1=minimum; 5=maximum)



Although not statistically significant (mainly because the projects' sample is very small and it wasn't always possible to rank each dimension), it's important to remind that 2 themes, Integration & Mainstreaming and Liaising & Governance, are somehow related: the more relevant a project on Liaising & Governance, the higher the rank on Integration & Mainstreaming (table 7).

1. Table: Contingency table<sup>26</sup> on project ranking relative to Integration & Mainstreaming and Liaising & Governance

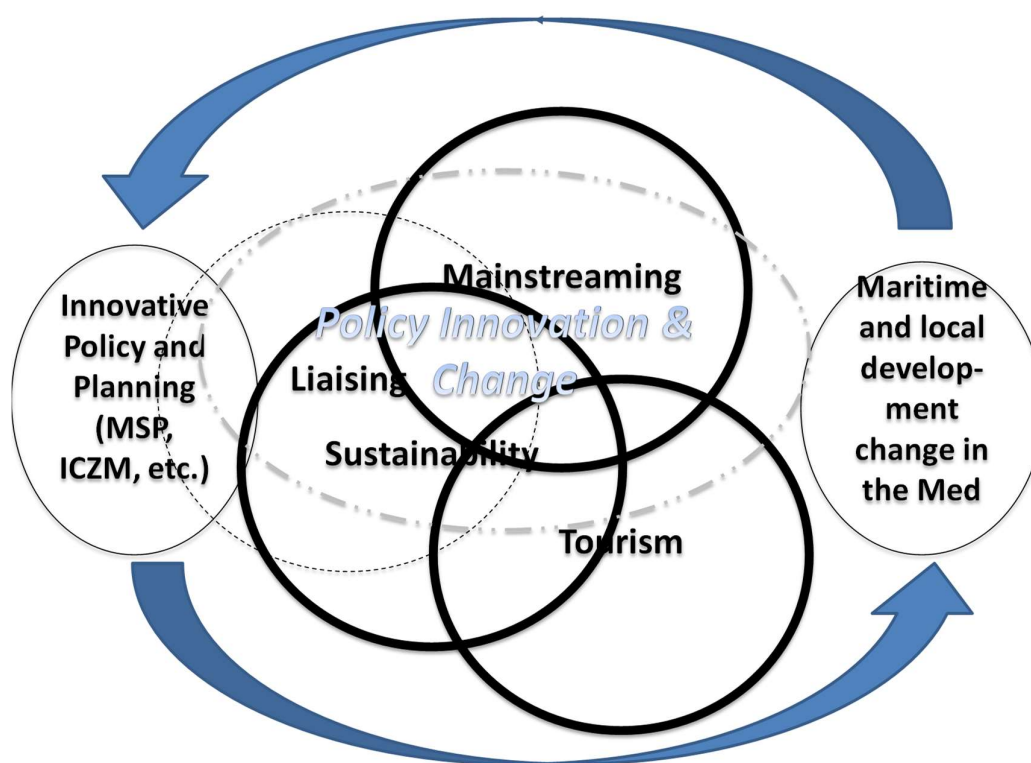
Ranking		Liaising & Governance						
		1	2	3	4	5	n.a.	Total
Integration & Mainstreaming	1	1	1					2
	2		1					1
	3	4	3	6	4			17
	4		2	2	4	1		9
	5			1	1	2		4
	n.a.			3	2	3	2	10
	Total	5	6	13	11	6	2	43

<sup>26</sup> The contingency table shows the frequency distribution of two variables and provides a basic picture on their interrelation. The rows represent the ranking a project received regarding Integration & Mainstreaming; the columns represent the ranking a project received regarding Liaising & Governance. The numbers in the table represent the number of projects with that exact ranking. E.g: 4 in row 3, column 1 means there were 4 projects that ranked 3 in Integration & Mainstreaming but only 1 in Liaising and Governance.

The descriptive analysis from the interviews and the project ranking for each key theme were first summarized in an organized matrix (PRCM), which was then used for grouping the projects into clusters according to the key and cross-cutting issues – Sustainable tourism (ranked on 5 different categories), Liaising & Governance, Integration & Mainstreaming, Innovation, Direct and indirect investments. In most cases, the relevance of the projects covers more themes, so that any attempt of detailed grouping would end up in producing overlapping project clusters, that is, the same project could be displayed in more than one cluster. For simplicity's sake, the relation was kept biunivocal by grouping projects into 3 broad clusters: in other words, one project may figure only in one of the 3 available clusters. Based on the most prevalent themes, three main clusters were identified (figure 10):

- Tourism
- Sustainability
- Policy and Mainstreaming

8. Figure: Integration & Mainstreaming and Liaising & Governance: clusters vs. themes



The projects were placed in their respective clusters according to their primary focus. This way of clustering is just one of many different possibilities, and the placement of the projects with



multiple foci could be debated in some cases; still this clustering does highlight the main issues these projects focused on as well as their results and relevance.

### CLUSTER 'TOURISM' - Characteristics and Lessons Learnt

The projects grouped into this cluster are specifically targeted to tourism, in many cases sustainable tourism (figure 11). They differ from those clustered under sustainability (see section below), because they exert a direct and specific impact on tourism. On the contrary, projects included in the sustainability cluster aimed, more in general, at sustainable development and at a sustainable use of resources, with a weaker link to tourism. The difference between the two clusters is blurred, since most projects of both clusters aim at fostering sustainable development, but as mentioned above, projects in the first cluster have a stronger focus on tourism. Within tourism cluster, the objectives and results achieved by the projects vary and most of them focus either on building and promoting itineraries and sustainable behaviours or on supporting thematic tourism. They foster the development of different patterns of tourism offer, rich of contents, quality and experiences, sometimes they rise awareness related to sustainable behaviours to empower tourists and are inclusive and upskilling for workers and operators, keeping the environmentally friendly aspects in mind. This appears the most logical strategy in the Mediterranean coastal region to counterbalance a tourism development model driven by the market. In some cases, such model suffers from shortcomings such as uneven socio-economic and territorial effects, excessive seasonality and congestion.

Even if the main focus is on tourism, the themes of the projects fall in the sustainability domain: from eco-tourism to cultural heritage tourism, from mitigating the congestion problems in the existing tourism pattern to experiential tourism.

Projects' results include, for example, the itineraries and packages created as the result of pilot actions or as the start of a new offer which needs to be diffused after the end of the project, methodological (guidelines, handbooks) or policy-oriented (sectoral plans, sectoral strategy design) outputs.

Despite the variety of results, in this cluster, projects seem to be more oriented to the production of contents (i.e. itineraries) rather than to the creation of tools. This can be considered a positive aspect, since, in some cases, tools (platforms, guidelines, etc.) run the risk of limited application, duplication and obsolescence after the end of the project.

Among the content-oriented aspects, most of the projects are focused on itinerary building, thematic tourism promotion and integrated tourism offers. A case in point is the *MEET* project, which provided a good (wide and intense) involvement of stakeholders, technical bodies and operators. They proved to be fundamental for developing an ad-hoc offer consisting of tourist packages, while coupling the conservation of environment with tourism development and following the principles defined by The European Charter for sustainable tourism in protected areas.

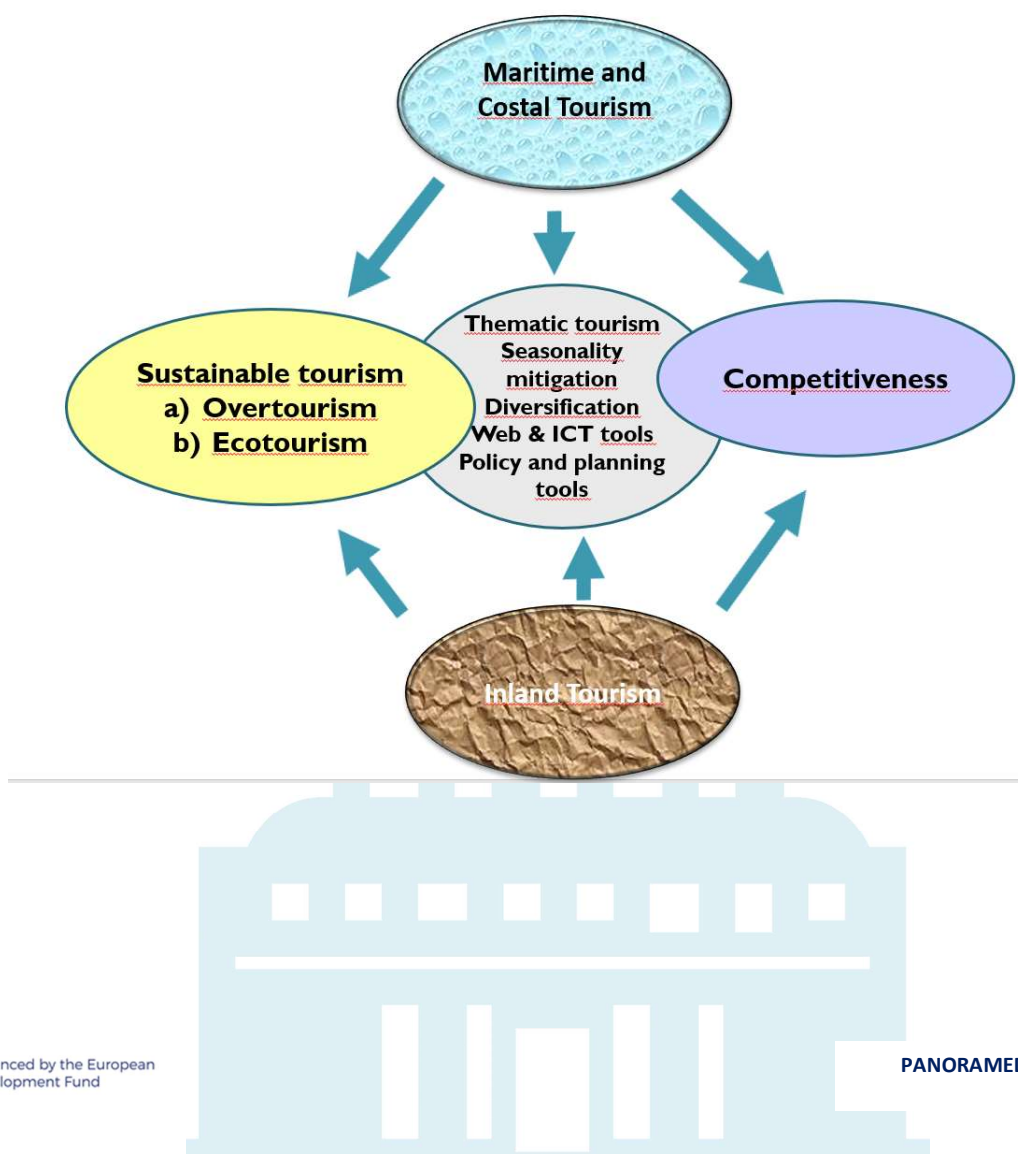
In some of the projects centred on itinerary building, interesting results achieved in terms of pilot actions carried out and local stakeholders' involvement, must be remarked. On the contrary, institutional and policy actors at high level were weakly involved (i.e. in *MEET* and *Live your tour*), and it limited the impact in terms of policy change and mainstreaming. In some other cases, i.e. *Brandtour* for Tuscany, the joint involvement of institutional (Regional Authority) and

technical stakeholders (tourism development agency) was a favourable condition which allowed for a proper linking of best practices with a specific policy instrument in the tourist sector.

A different pattern of projects is the one aimed at reducing the negative implications of mass tourism and overcrowding. In this regard, the project *Alter Eco* has produced a variety of results and outputs: surveys, tools as guidelines, evaluating model, plans, awareness building through participatory initiatives and campaigns, apps, changes in regulation and local tourist taxation. In particular, a tool for estimating the carrying capacity was built by Ca' Foscari University of Venice and applied in partners' territories. The monitoring of tourist (actually people) flows through the mobile connection in a certain specific area (i.e. in the city centre, on the beach, etc.) or in a destination is also an interesting result that can be useful for very congested focal touristic points as the city centre of Venice and/or Dubrovnik. A different approach to the problem of tourism overflow is instead provided by *Herit-Data* Project which has been exploring the potentialities of mitigating the problem of overtourism through the use of a platform based on open and big data and aimed at managing and optimising visitors' flows and thus creating a smart tourism tool.

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9. Figure: The Tourism cluster articulation



2. Table: Tourism - Summary of the clustered projects

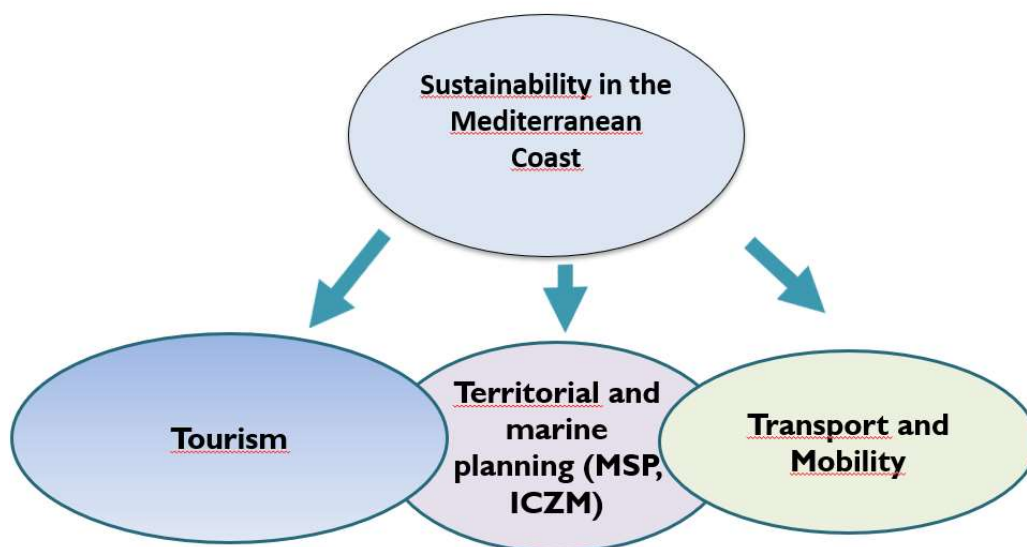
Projects clustered	Significant results/practices	Relevance and Implications
<b>ALTERECO</b>	Tool for estimating the carrying capacity	Effective local policies to mitigate coastal overtourism.
<b>2BPARKS</b>	Experimental programs and actions for the growth of sustainable tourism	By capitalizing on the results of several previous projects a network is created to use the accumulated knowledge and best practices and develop experimental actions to promote sustainable tourism.
<b>BLUEISLANDS</b>	Monitoring of seasonal waste generation by tourism  Pilot mobile recycling center  Innovative strategy for wastewater management	The seasonality of tourism increases the environmental impact in prime seasons. Adapting new strategies and solutions is necessary to cope with the additional pollution during these times.
<b>BLUEMED</b>	Pilot actions with underwater museums, diving centres and knowledge awareness centres.	Actions to mitigate the issues of coastal tourism by adapting a sustainable and responsible model for tourist development.
<b>BRANDTOUR</b>	Best practices	By enhancing the visibility and market uptake of less known destinations the flow of tourism can be equalized and the effects of overtourism on the more popular areas lessened.
<b>CO-EVOLVE</b>	Studies, guidelines and pilot activities in sustainable tourism.	Assesses threats and shortcomings in the pilot areas and provides solutions to local and regional authorities through pilot testing.
<b>DESTIMED</b>	Guidelines and procedures  Ecological footprint model	A destination management organisation that promotes attractive ecotourism offers via a lasting brand.
<b>EMBLEMATIC</b>	Slow tourism eco-itineraries	By creating specific “slow tourism” eco-itineraries for unique areas, tailor-made local strategies can be made for specific areas to cope with overtourism.
<b>GOALS</b>	7 pilot itineraries	Through the example of various niche tourism, innovative tools can be created to create and enhance sustainable tourism destinations.
<b>HERA</b>	Action plan and pilot projects under the HERA trademark  Cultural routes, visitor centres and related tourism packages	Cultural routes and related tourism packages help with sustainability by using the strength of recognisable cultural landmarks under a common trademark to direct the flow of tourism.

<b>HERIT-DATA</b>	Instruments and tools to enhance sustainable tourism.	A more optimised management of tourism flow creates a win-win situation by also increasing the limits of local carrying capacity.
<b>LIVE YOUR TOUR</b>	Tourist packages, promotion of destinations	Tourism driven by natural and cultural resources in less crowded or not traditionally touristic areas and generating tourism flow in off peak seasons helps with the issues of overtourism.
<b>MED EMPORION</b>	Pilot actions in Barcelona, Marseille, Genoa and Torino	Building on the traditional locations of local markets urban tourism is improved and various best practices are introduced.
<b>MEDCYCLETOUR</b>	Promotional material of EuroVelo 8 Pilot projects for cycling tourism	Through the example of thematic (cycling) tourism, various tools can be created to enhance sustainable tourism destinations.
<b>MEDFEST</b>	Roadmap and strategy for planning and managing sustainable culinary tourism	Through the example of thematic (culinary) tourism, various tools can be created to enhance sustainable tourism destinations.
<b>MED-PHARES</b>	3 restored lighthouses	A model applicable to all territories of the Mediterranean area allowing to showcase the tangible and intangible heritage of coastal sites.
<b>MED-ROUTE</b>	30 thematic touristic routes	Through the development of new tourism routes the flow of tourism can be changed and the effects of overtourism can be lessened.
<b>TOURISMED</b>	Development and testing of fishing tourist itineraries and training of fishermen	Through the example of thematic (fishing) tourism, various tools can be created to enhance sustainable tourism destinations.
<b>UMAYYAD</b>	UMAYYAD digital museum in Lebanon	Promoting sustainable tourism through the common history and cultural background of 6 countries.

### CLUSTER "SUSTAINABILITY" - Characteristics and Lessons Learnt

As anticipated in the previous section the sustainability cluster includes projects aimed at fostering sustainable development and/or a sustainable use of resources, excluding those with a direct or specific link to tourism for which there is an ad-hoc cluster. In this group, projects focused on sustainable mobility and technologies for sustainable development are included as showed in figure 12.

10. Figure: The Sustainability cluster articulation



The sustainability cluster is even more varied than the tourism one (table 9). Some of the projects focus on tools, especially those within the domain of planning, if broadly defined, i.e. MSP, GIS, smart technologies in urban tourism (sensor-based data) and plan for sustainable mobility. Noteworthy are the actions implemented by *Supreme* and *Simwest* Projects which combine the effort on capacity building and on increased application of a technical planning tool like MSP with the involvement of high-level governmental institutions and policy makers in charge of maritime planning. Some other projects address specific issues on sustainability, which involve innovative technologies, and are based on best practices and pilot actions. Overall, it appears that there is no clear-cut border between a sectoral approach to sustainable tourism and a more holistic approach to sustainable development (which encompasses also tourism). Sectoral approaches appear more appropriate for specific purposes and development /diffusion of best practices, while planning would need a more comprehensive approach. Indeed, few projects approach sustainable development in a comprehensive way, and when they do it, as in the case of MSP, the road map appears to be long and complicated, so that single projects, given their time span, may contribute to progress, but not necessarily to a full and homogeneous application of a certain planning instrument by all partners.

3. Table: Sustainability- Summary of the clustered projects

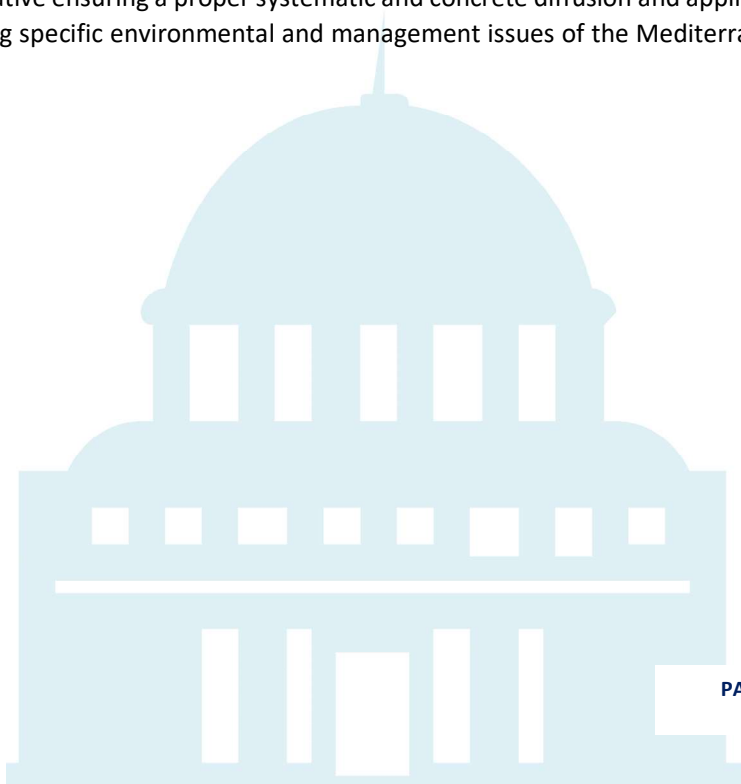
Projects clustered	Significant results/practices	Relevance and Implications
<b>BLEUTOURMED</b>	Shoreline management program	Implements a coastal observatory network in the Mediterranean to help adaptation to climate change in coastal areas.
<b>CASTWATER</b>	Validated tool for SMEs and public authorities to monitor, compare and assess water efficiency.	Promotes the ideas of water sustainability and provides tools to help with enforcing the ideas.
<b>CONSUME-LESS</b>	6 destinations and local action plans	By identifying specific “Consumeless Med” locations and creating specific action plans for them, sustainable energy, water and waste management strategies are implemented.
<b>CYCLO</b>	Sustainable mobility plan	Participatory planning tools which is local policy drive for sustainable mobility (bikers and hikers)
<b>F.O.P.</b>	Diffused community hotel in the centre of Bethlehem, and related innovative tools	‘Future of Our Past’ shows how innovative tools and strategies can make the local community more involved in both preserving cultural heritage and bringing touristic and economic development.
<b>FUTUREMED</b>	Pilot actions with application of technologies and procedures	The competitiveness of the Mediterranean ports relates to their accessibility which can be improved by the development of intermodal transport systems.
<b>IAM</b>	3D reconstructions and augmented reality installations	Innovative multimedia technologies are used to raise awareness and help the preservation and sustainability of cultural heritage sites.
<b>LIMIT4WEDA</b>	Case studies and pilot actions for sustainable mobility	By adopting innovative solutions in public transport, it is possible to improve the quality of life of those living in low-traffic or low-demand areas.
<b>MedLab</b>	Pilot projects (Inno-SME Networks, Rural Development, Coastal Zone Management, Participatory Strategic Planning)	The pilot projects showed how technological, social, organisational and institutional innovation can help with the issues of sustainability through concrete examples and best practices.
<b>SHCity</b>	Smart technologies in urban tourism (applications, sensor-based data, city model)	The use of smart technology helps with the protection of built heritage and helps with several issues caused by overtourism and overflow.

<b>SIMWEST</b>	A methodology for Maritime Spatial Planning (MSP); Elaboration of case studies; lesson learnt.	The assimilation and a coordinated/homogeneous application of MSP in the West Mediterranean
<b>SUPREME</b>	A methodology for Maritime Spatial Planning (MSP); Elaboration of case studies; lesson learnt.	The assimilation and a coordinated/homogeneous application of MSP in the East Mediterranean
<b>SUSTCULT</b>	Network of participants from 7 countries  WebGIS platform	Through innovative approaches the protection of cultural heritage and economic development of a territory can be reconciled.

### CLUSTER “POLICY & MAINSTREAMING” - Characteristics and Lessons Learnt

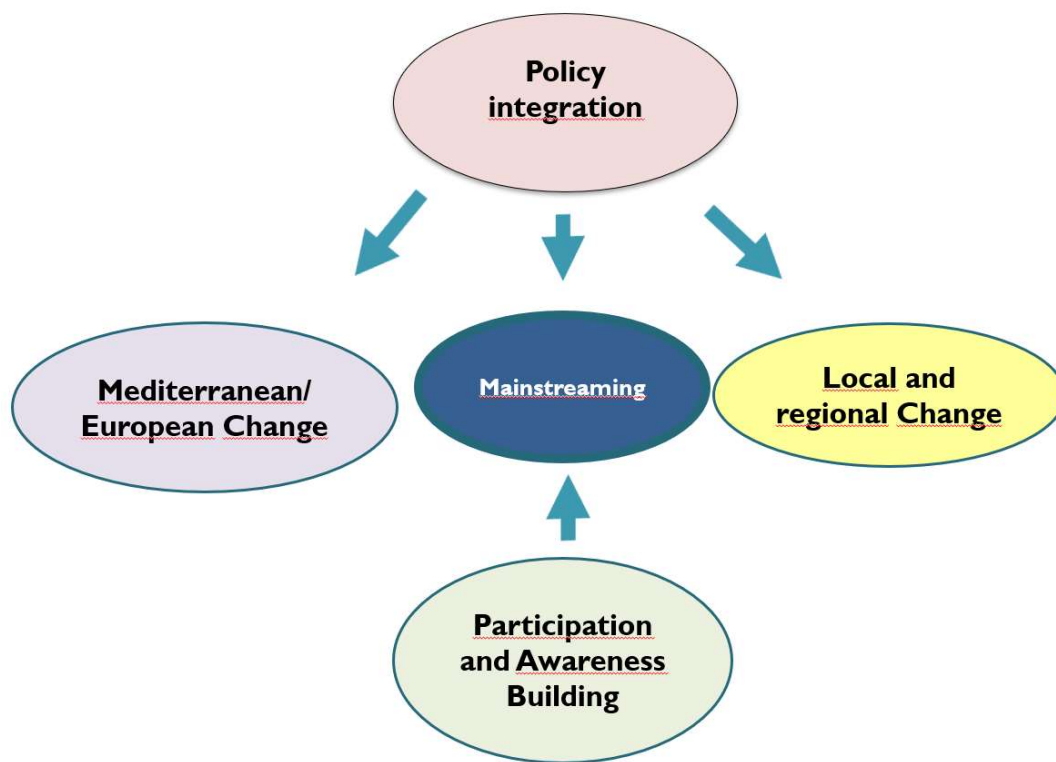
The guiding principle in grouping projects within the ‘Policy & Mainstreaming’ cluster refers to the relevance of these actions in stimulating or/and consolidating a policy change, a process that may occur through the adoption and diffusion of best/good practices (and related tools) for sustainable development and sustainable tourism. Mainstreaming process can take place at various territorial dimensions: European, national, regional/local. It can be seen as an important condition for the projects to generate a significant long-term impact on sustainable development since this group of projects focuses on experimentation and demonstration as well as on raising awareness and exchanging knowledge. The goal here is to give rise to a self-sustaining process of policy change rather than directly determine the change itself, and in this respect policy integration and liaising reinforce and consolidate the impact in terms of policy change and improvement (figure 10).

At this regard, Mainstreaming appears to be related to liaising activities. A case in point is *Coastgap* (a best practice capitalisation project aimed at mitigating the challenges of climate change in the Mediterranean coast) which was strongly integrated with other projects and initiatives at regional, national, and European/international level. It contributed to the “Bologna Charter”, an initiative ensuring a proper systematic and concrete diffusion and application of ad hoc policies facing specific environmental and management issues of the Mediterranean coast (table 10).





11. Figure: The Policy & Mainstreaming cluster articulation



4. Table: Mainstreaming - Summary of the clustered projects

Projects clustered	Significant results/practices	Relevance and Implications
<b>BleuTourMed</b>	<p>External communication strategies</p> <p>Mapping of sustainable tourism challenges</p>	Through better external communication a wider public can be reached. By identifying the main issues of sustainability, strategic recommendations can be given to key stakeholders.
<b>COASTGAP</b>	Bologna Charter	Governance and adaptation policies aiming to reduce risk along coastal zones and foster their sustainable development
<b>GO SUMP</b>	<p>External communication strategy</p> <p>External and internal communication tools</p> <p>Support and animation of the urban transport community</p>	Through better external communication a wider public can be reached. By improving internal communication, various actors and stakeholders of the urban transport community can cooperate better.
<b>MARE NOSTRUM</b>	Toolkit of alternative legal-institutional policy instruments	National level institutional coordination is needed to help tourism related issues at a regional and local level.
<b>MAREMED</b>	<p>Analysis on the impact of climate change</p> <p>Map of the different connections in maritime affairs</p>	Scientific results are used with clear messages and recommendations to influence local policies; and the provided tools help with generating more knowledge and scientific results which in turn can be further used to influence policies.
<b>MarinA-Med</b>	Capitalisation events and conferences	Multi-level and multi-stakeholder partnerships with a high level of expertise in the maritime field aid the capitalization and mainstreaming of project results.
<b>MEDGOVERNANCE</b>	Thematic policy studies and regional strategic plans	Through organization of activities of key actors, awareness development and the integration of existing programming tools help with building and diffusing a policy integrated vision at a macro-region (Western Mediterranean) level and apply its implications on strategic planning at a regional level.
<b>MedLab</b>	<p>Databases and strategic documents on various environmental initiatives</p> <p>MedLivingLab - Transnational multi-level governance network integrating Living Lab partnerships</p>	Various local and regional initiatives work better when integrated into a transnational network; which in turn helps bringing larger scale innovation to local and regional levels.

<b>MEET</b>	Pilot actions  Sustainable tourism packages	Through the dialogue between technical partners, political institutions and companies, new tourism offers can be developed based on the principles of environmental sustainability.
<b>MITOMED+</b>	System of indicators and models of tourism destinations	By providing orientation for future transnational actions and projects the governance of tourism can be improved.
<b>PANACEA</b>	Scientific synthesis to influence policies  GIS-related tools and databases	Scientific results are used with clear messages and recommendations to influence local policies; and the provided tools help with generating more knowledge and scientific results which in turn can be further used to influence policies.

## A NOTE ON MIGRATION

The issue of migration was prevalent in the Mediterranean area in the past years, and it still remains among a major focuses of tourism experts; however, none of the analysed projects dealt with any issues related to migration, therefore no feedback was received regarding this topic.

## SOME CRITICAL REFLECTIONS AND BRIEF SUGGESTIONS FROM THE FIELD ANALYSIS OF PROJECTS

Although aware of the many limitations of the field analysis (the total number of projects analysed makes statistical analysis difficult, only one interview for each project, etc.), it is possible to draw some lessons and observations from the scattered evidence reviewed so far. The following observations are mainly built on subjective impressions and on opinions, rather than on hard facts and on robust objective evidence.

Some projects, though efficiently and properly managed from a technical point of view, appear to be weaker than expected, in terms of visible effects on sustainable patterns of development and of smart tourism in the Mediterranean coast.

The main weak point is the limited impact of the projects, especially if taking into consideration the significant financial resources allocated and invested in these actions. If looking solely at the concrete results and outputs produced, the impression of a 'result/impact disproportion' is strong, but it has also to be considered that they are (and also have to be) experimental/demonstrative. Indeed, the most important impact of a project should be not searched in the immediate and direct production and use of its results; but rather at policy level, in its ability to trigger changes in partnering territories and, more in general, in the EU. In other words, the most important effects should occur in terms of mainstreaming, liaising and policy innovation. However, it is just considering this kind of impacts that some projects, apparently produce encouraging effects during their implementation but they run the risk to exhaust soon their influence and get it lost over the long run, short after their completion.

Of course, many factors may determine the extent of project impacts, as shown by some positive cases and other less positive examples.

First, projects should concentrate more on contents and less on tools, which require often expensive architectures. A typical example is the creation of platforms which can easily become obsolete after the project end. Switching to the use of common, standardized, open source and free tools rather than investing valuable project resources in the construction of ad hoc tools might be more desirable.

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Second, looking at the partnership composition and at the actors involved, the co-presence of policy makers and technicians can be considered a positive condition which may increase the effectiveness of the project and its success. Local/regional governments actively involved (that is, those which fully play their institutional role, not only delegating) together with their technical agencies are a good example of this form of cooperation.

Finally, the way a project impacts policy change should be carefully foreseen from the beginning, choosing which policies to adopt and the related improvement actions. This implies a precise idea of the mainstreaming/liasing activities related to a specific project. Perhaps, this is too demanding for a single project, but there are projects which embed these elements because there are steps of wider process/action. An example is the *Coastgap Project* and the *Bologna Charter*, which is a European joint action, that goes beyond the single projects that have contributed to it. As already mentioned, even if projects are well managed from a technical point of view, the risk they leave a poor legacy is high. Furthermore, it is very difficult to recover knowledge and impact when a project is already over. In these cases, even ex post capitalisation actions or similar can do little to avoid that the knowledge created by these projects get dispersed and their impact nullified. To conclude, more effort should be devoted during project design on the precise mechanisms on which mainstreaming, and liaising occur, in order to leave an enduring policy impact.

## 3.2 INPUTS FROM HORIZONTAL PROJECTS AND PANORAMED ASSOCIATED PARTNERS

### 3.2.1 Inputs from Horizontal Projects

Through their combined work the 8 horizontal projects (HPs) of PANORAMED created a matrix to compare how various levels of national competences deal with the priorities relevant to PANORAMED in 12 Mediterranean countries. Three of these horizontal projects (BLEUTOURMED, GO SUMP, PANACEA) were also interviewed during the field analysis and provided their insight on the issues relevant to PANORAMED.

#### **BLEUTOURMED**

BleuTourMed is an INTERREG Med (2014-2020) horizontal project with the goal of creating and supporting the Sustainable Tourism Community in the Mediterranean area. BleuTourMed follows an evidence-based approach for the development of sustainable and responsible coastal and maritime tourism. This is done both on theoretical (mapping the sustainable tourism challenges in the Northern Mediterranean shore and creating a methodology for the monitoring

and maintenance of the shorelines) and practical (the implementation of a coastal observatory network in the Mediterranean basin for the adaptation to climate change) basis. A web platform has been created to present the collected evidences to the stakeholders and the general public. Through the community, the project aims at contributing to the unique identity of the Mediterranean cooperation area through the capitalization of their results as well as the protection and promotion of national and cultural resources.

#### Main/planned outputs:

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- Integrated External Communication strategy plan for the Community results and Euro-Med dissemination
- Enhanced visibility and impact of the Community on the main target and public of the Euro-Med area
- Diversification of the Community content packaging to enhance programme's content accessibility
- Data integration on sustainable and smart tourism
- Community and networking activities
- Supporting modular projects for capitalising their results to influence key target groups
- Mapping of the sustainable tourism challenges in the Northern Mediterranean shore
- Integrated thematic approaches and results
- Policy impacts by providing key stakeholders with public declaration and Policy paper addressing strategic recommendations

#### GO SUMP

GO SUMP is an INTERREG Med (2014-2020) horizontal project which leads and animates the MED Urban Transport Community. The project guides and supports the development of its modular projects as a community, through joint strategies based on synergies and networking. GO SUMP helps enhancing their peculiarities as a key to implement low carbon transport and mobility measures. The project is responsible for creating the Urban Transport Community Strategy as well as the External Communication Strategy and internal communication tools for the community.

#### Main/planned outputs:

- The Urban Transport Community External Communication Strategy
- Communication e-material tailored for the Community
- Communication Events to reach target groups
- The Interreg Med 2.3. Urban Transport Community Strategy
- Support and animation of the Urban Transport Community
- Internal communication tools for the Urban Transport community
- Translation of project results
- Establish long-term links with key European initiatives and stakeholders
- Mainstreaming project results into policies
- Reaching out to decision makers at every level

## PANACEA

An INTERREG Med (2014-2020) horizontal project, PANACeA leads and supports the Biodiversity Protection Community by streamlining networking and management efforts in Mediterranean Protected Areas as a mechanism to enhance nature conservation and protection in the region. PANACeA synthesizes various outcomes of natural conservation and biodiversity conservation efforts into factsheets, technical and policy papers and media materials to deliver clear messages and recommendations. Geographical Information System (GIS), related spatial tools and databases are also used to generate new knowledge and to better integrate past and current datasets from related projects.

### Main/planned outputs:

- Scientific syntheses with clear messages and recommendations to be used in management and to inform and influence current policy (Factsheets, technical and policy papers, including media materials).
- The use of spatial tools and databases to generate new knowledge and better integrate past and current datasets from related projects (GIS related products).
- Enhancing communication and learning through networking and showcasing the outputs of the 11 community projects (presentations and side events)

## Findings based on the horizontal projects' results

All the three analysed horizontal projects were designed with the goal of creating a community out of separate (modular) projects with similar goals. Community building goes beyond simply coordinating the modular projects' efforts and gives these projects a unique identity. The isolated work of earlier projects reduced their impact outside their specific territories, hampering the transfer and replication of results and best practices at a transnational level. By working as a community, this unique identity is used to improve the visibility, capitalization and mainstreaming of the projects' results; sharing good practices and knowledge and avoiding bad practices. Communication is key – both within and outside the communities. Good internal communication, aided by the right tools and strategies, helps the community building and the sharing and integration of results. Good external communication on the right forums increases the visibility of the results and their impact by reaching decision makers, stakeholders and the general public. The results communicated should be factual and evidence-based with clear messages and recommendations, able to exert a meaningful influence on policies and decision making on all levels.

Similarly to several smaller projects (especially those in the Sustainability cluster), all the three horizontal projects have a strong environmental focus (through their own actions, those of their modular projects or both). Tourism puts a strong pressure on natural ecosystems, including the over-consumption of water resources, land uses, pollution and waste. All dominant forms of tourism in the Mediterranean Area have their own associated environmental issues, listed below. The cumulative impact of tourism on the maritime and coastal ecosystems has a double effect on the social well-being of the region, as, on one side it degrades the quality of the physical and built-up environment, while on the other side this degradation affects the future

development of tourism (e.g. off-season and integrated tourism offers, etc.) and the associated local socioeconomic benefits.<sup>27</sup>

5. Table: Coastal tourism activities and related environmental issues<sup>28</sup>

Activity	Description	Potential environmental issues
Coastal tourism	Beach tourism, diving, sailing, water and coastal sports	Plant and soil trampling, wildlife disturbance, removal from nature, littering
Cruise tourism	Open-sea cruising, short-term mass tourism in ports of interest	Discharges from cruise vessels in sea and at port, waste, impacts of navigation traffic
Recreational boating and fishing	Leisure navigation, boat chartering and renting, marinas, fishing equipment, licensing	Wildlife disturbance, exhausts from outboard engines, marine litter

Tourism development is a double-edged sword. Attractive natural resources (and build environment) are key factors in creating popular tourism locations and thus are directly responsible for a significant part of a country's economic growth. Increasing tourism activities soon lead to mass tourism and overflow and to the degradation of this already vulnerable environment. The improvement of current management tourism practices and related smart solutions is essential in order to avoid rapid degradation of coastal and maritime ecosystems while maintaining the sector's contribution to the economic activities of the respective areas.<sup>29</sup>

Climate change represents an additional increasing environmental issue, which, in the coming decades, will become an ever present and ever-increasing factor of influence. The coastal areas are especially vulnerable to climate change due to the rising water levels placing lower-level areas at the risk of submergence. Both the reduction of factors leading to climate change (e.g. the low-carbon-emission transport goals of GO SUMP) and data gathering/early warning measures (e.g. the coastal observational network of BleuTourMed) could play an increasingly important role in the coming years.

### 3.2.2 Inputs from PANORAMED Associated Partners

To provide further insight into relevant strategic areas of intervention needing to be filled or providing important growth opportunities, PANORAMED Associated Partners (AP) received a short questionnaire with five open-ended questions. Due to the low number of answers received, it was not possible to perform a proper analysis of the comments received, but the observations made by the APs provide the basis for a deeper analysis to be realized in the next review of the GGOR, as they reflect points and issues arisen in the PRCM as well.

<sup>27</sup> Source: "Identifying challenges and gaps towards sustainable and responsible coastal and maritime tourism in the Mediterranean". MED Sustainable Tourism Community's 1<sup>st</sup> thematic paper by BleuTourMed

<sup>28</sup> Source: European Environment Agency (2013)

<sup>29</sup> Source: „Reducing tourism pressures in the MED area“. MED Sustainable Tourism Community's 3<sup>rd</sup> thematic paper by BleuTourMed



6. Table: Questions and answers from AP questionnaire

Question	Answers:
As a PANORAMED Associated Partner, which challenges related to the coastal and maritime tourism is your cooperation program/institution/organization/initiatives tackling?	<ul style="list-style-type: none"> <li>• Natural heritage preservation/environmental issues</li> <li>• Tourism sector support (including sustainable tourism)</li> <li>• Blue Economy</li> </ul>
Based on your experience and your relations with your stakeholders, which are the main remarks and requests related to the tourism sector arising from a dialogue with these subjects?	<ul style="list-style-type: none"> <li>• Tourism development without endangering natural heritage</li> <li>• Small scale cruise development</li> <li>• Coordinated actions of all levels of Public Administrations</li> <li>• Cooperation between Governmental, Academic and Private sectors and the civil society</li> <li>• Sharing data and best practices in the tourism sector</li> <li>• Better Decision Support Systems</li> <li>• Strengthening the sustainability and cultural aspects of the tourism sector</li> <li>• Mainstreaming sustainable tourism in the emerging strategies and initiatives or framework of cooperation at Euromed scale</li> <li>• Fully exploit innovation and ICT in the tourism sector</li> <li>• Using ICZM and MSP as relevant tools</li> </ul>
Can you list any relevant strategic elements that are missing or lacking in the way PANORAMED approaches its thematic focus (Coastal and maritime tourism) and its sub-themes (i.e. maritime transport linked to tourism cruises, integrated coastal and maritime tourism, innovative and sustainable offer)?	<ul style="list-style-type: none"> <li>• More information about the mapping of programmes and funds tackling this topic (not only Interreg)</li> <li>• Stronger link between the work carried out by the Horizontal Projects</li> <li>• Enhance the use of ICZM and MSP tools</li> <li>• More transversal approach with other economic sectors</li> </ul>
With respect to existing policies and areas of intervention related to the coastal and maritime tourism do you have any specific actions in mind that should be introduced or reinforced?	<ul style="list-style-type: none"> <li>• The development of the tourism sector should always ensure sustainability and protection of the natural heritage</li> <li>• Coordinated actions of all levels of Public Administrations</li> <li>• Cooperation between Governmental, Academic and Private sectors and the civil society</li> <li>• Sharing data and best practices in the tourism sector</li> <li>• Better Decision Support Systems</li> <li>• Strengthening the sustainability and cultural aspects of the tourism sector</li> <li>• Mainstreaming sustainable tourism in the emerging strategies and initiatives or framework of cooperation at Euromed scale</li> <li>• Fully exploit innovation and ICT in the tourism sector</li> <li>• Using ICZM and MSP as relevant tools</li> </ul>
Do you think PANORAMED is well enough integrated with similar projects/programs or is the project missing specific complementarities and synergies with some of	<ul style="list-style-type: none"> <li>• Collaboration could be strengthened with WestMed, EUSAIR, BlueMed, ENI CBC MED, Interreg ADRION, Mediterranean cross-border programmes, UNEP/MAP, UfM</li> </ul>

them? Please provide us with examples of project synergies that could be created or strengthened!	<ul style="list-style-type: none"> <li>• Territories from Southern and Eastern Mediterranean countries should be involved in projects</li> </ul>
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As mentioned above, because of the low number of answers, the results are blurred; however, based on the input received from the APs, it is possible to identify the most important areas of intervention, which are:

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- Sustainable tourism and the preservation of natural heritage;
- Better cooperation between all governmental levels; between governmental, academical and private sectors and the civil society; between various programmes and initiatives;
- Integrated Coastal Zone Management;
- Innovation

Since all these issues have been already addressed by several of the examined projects, the fact that the Associated Partners still consider them as areas where intervention is needed, proves their relevance. These issues should be therefore highlighted and kept into account for what concerns future projects and planning activities.

### 3.3 EXPERTS' RECOMMENDATIONS TO FOSTER FUTURE SECTORAL GROWTH

In the frame of the activities of the Transnational Working Group on Coastal and Maritime Tourism (TWG5), Coastal and Maritime tourism experts from the partner's countries were invited to discuss the future patterns of the Mediterranean tourism sector and to provide useful recommendations. The chance to perform such an in-depth discussion were the 4<sup>th</sup> and 5<sup>th</sup> meeting of TWG5 Coastal and Maritime Tourism, held respectively on 25<sup>th</sup> September 2018 in Paris and on 9<sup>th</sup> November 2018 in Rome. To support the organization of these meetings, planned in the form of Focus Group discussion, WP5 leader and co-leader engaged a team of external experts with a background in management and communication activities.

Since these meetings were open to the whole PANORAMED partnership, attendees, such as external experts or Country Coordinators, joined and contributed to the outcomes with complementary feedbacks.

Given the central role of the external experts and in order to allow them to contribute in the best way possible to the discussions, a brief structure of the main questions to be deepened were provided them in advance. The aim was, for the experts of each country to formulate a shared national position on the gaps-and-growth paths to be presented during the Focus Groups. After each meeting, the experts had several days to review the draft report validated by the TWG5 leader and co-leader, with the aim of revising and adapting the documents in a way that could fully reflect the respective national point of view.

The objective behind each Focus Group was different in terms of contents to be produced. The first Focus Group held in Paris was the starting point to define the framework of the technical

contents of the “Terms of Reference (ToR) for strategic projects”. The Focus Group in Rome had the goal to contribute to the “Gaps and Growth Opportunity Report” (GGOR). Both Focus Groups’ objectives weren’t only to gather information from their participants to draw up ToR and GGOR documents, but also, based on such info, to foster and stimulate the debate, involving in the discussion regional, national and transnational stakeholders of the countries involved in PANORAMED. The overall process is in fact aimed at creating focalized discussions on the topics tackled in the documents, by involving many interested parties at different governmental levels. As a consequence, it was fundamental for the Focus Groups participants to understand the importance of providing self-consistent and stimulating recommendations.

After the meetings, two additional reports, one for each Focus Group, collecting all the inputs received, were produced.

### General contributions

Fruitful discussions were a key point to stimulate the debate among the participants in the Focus Groups and to identify the possible solutions to solve the main issues related to the Coastal and Maritime Tourism. Growth strategies were elaborated by the partners during the meetings, or later by the team of external experts in charge of the management of the Focus Group, with the supervision of WP5 leader and co-leader. The latter method was useful to bring together all the inputs received and to cluster them depending on the different gaps to be solved. The approach adopted helped to bring forth and drawn up the main growth strategies coming out from the discussions, highlighting the most important urgencies to be addressed, together with fruitful suggestions on how to mitigate the problems.

Being the Focus Group a moment of discussion among experts from different countries of the Mediterranean basin, the needs coming out weren’t perfectly aligned, being each expert in charge to represent specific challenges and solutions. An example is the event of countries facing challenges already overcome by other nations. The first step to solve the matter is to do an assessment of the issues to be faced by less mature countries, to fit the more similar good practices implemented in similar contexts, environment and policies, and then apply them to those countries. Identifying similarities among the issues and the environmental contexts should speed-up the process of setting and reproducing of the good practices. Benefits could come from the experience gained in previous implementing processes and from advices of the countries who already faced and solved the same challenges. By doing so, mistakes and losses of time and resources could be avoided or greatly reduced, allowing a faster and more sustainable solving of the issue tackled.

A second aspect to be highlighted is that, during the 1<sup>st</sup> meeting, experts agreed on a common general approach to foster future sectorial growth, by identifying the main gap to be addressed (1), the growth strategy to be implemented (2) and the related policies (3):

1. Management of expected tourist flows and avoidance of negative impacts in Med area. How to make tourism/tourists more acceptable for locals, considering that the number of tourists in Europe will rise? The challenge is to preserve Med identities and to avoid the massive destruction of destination from social, economic and environmental point of views.
2. To give value to new offers/destinations. Specific products can help to overcome tourism pressures (e.g. overflow) and bring it in internal and less visited areas,

developing new or better integrated tourism offers not only in peak season but also and especially in off-season. This should help in spreading out the flows of services offered all over the year, diversifying the supply, giving value to less known destinations and implementing new business models. A new way of thinking is required for the smart tourism model because mind-shifting is the key to improve and diversify the offer while preserving the heritage as well.

3. Integration of policies. To help this process it's crucial to enlarge the pool of local stakeholders committed to the good causes, not just involving but especially engaging them on these matters. The development of smart tourism clusters, and not just the creation of simple synergies, should be taken into consideration, too.

The agreed approach mentioned above resulted in great importance during the meeting of TWG5 Coastal and Maritime Tourism, held on 25<sup>th</sup> October 2018 in Rome, where TWG5 tourism experts and external experts worked together with WP5 leader and co-leader to identify the main elements of the *Terms of Reference* (ToR) for strategic projects in Coastal and Maritime Tourism (objectives, activities, tasks, expected results and identification of the target groups and beneficiaries). Having in mind the previous discussions and the achievements of the first Focus Group, the drafting of ToR for Coastal and Maritime Tourism was set and brought to the editing of a first sound draft.

### Outcomes of the Focus Groups

The outcomes of the two Focus Groups were elaborated following a similar approach, and listed into two different tables, one for each Focus Group. The layout of the two tables is slightly different, due to the peculiar end-use of each Focus Group.

The first Focus Group, held in Paris, was developed around three main steps: 1) identification of the main issues of the sector at regional/national level, 2) evaluation of how to foster future sectorial growth, 3) assessment of the policies and their possible positive impact on coastal and maritime sector. The three sections can be found as columns of table 13, here below, while the rows correspond to the different issues/themes and sub-issues/subthemes identified. From the discussion arose three *paths* (main issue – related solutions – policy recommendations), representing the main ideas and contributions expressed in the meeting, or in other words the main subjects on which interests were converging. Each path is the collection of single/multiple contributions made by the experts and other attendees. It summarizes statements, examples, clarifications, data, sources of information, and so on, which are not included in the present document. For each path were identified the issues (with related sub-issues) and from there possible compatible solutions and connected policies. As showed in table 13, the first issue/challenge highlighted by the Focus Group is the overflow, which has as corollary the consumption of local resources. The second one refers to seasonality and has as consequence the problems related to quality of employment, both in offer and demand side. The last issue outlined is the presence of old growth patterns for coastal cities, which implies the preservation of local identities and the pressures affecting the local population.

In some cases, solutions and policies identified are repeated because they are considered transversal and therefore applied to different issues.

7. Table: Experts' recommendations coming from the Focus Group in Paris

	Issues	Solutions	Policies
1	Increased number of tourists/overflows	<ul style="list-style-type: none"> <li>Increased data sharing and analysis</li> <li>Development of new thematic products</li> <li>Use of new technologies/innovation/services</li> <li>Strategic planning</li> <li>Development of new regional offers</li> <li>To create a virtual monitoring center</li> </ul>	<ul style="list-style-type: none"> <li>To involve and empower different stakeholders in this matter.</li> <li>Innovation in facing challenges.</li> <li>Environmental protection</li> <li>Quality of data within the action plans of former and ongoing projects</li> <li>Decrease of bureaucracy to help SMEs and simplification of the framework</li> </ul>
1a	Consumption of local resources		
2	Seasonality	<ul style="list-style-type: none"> <li>Different use of resources to expand the high season length</li> <li>Development of new thematic products</li> <li>Use of new technologies/innovation/services</li> <li>Higher involvement of government/public sector</li> <li>Strategic planning</li> <li>Blue economy experts to help integrate offer for tourist destinations</li> <li>Cross-selling products</li> <li>Development of new regional offers</li> </ul>	<ul style="list-style-type: none"> <li>To involve and empower different stakeholders</li> <li>Synergies with institutions</li> <li>Flexibility in project policies</li> <li>Merging of different subjects to increase the quality of tourism</li> <li>Decrease of bureaucracy to help SMEs and simplification of the framework</li> </ul>
2a	Lack of workforce in tourism sector and low value-added quality of services offered due to seasonality employment	<ul style="list-style-type: none"> <li>Strategic planning</li> <li>Create and spread Universities' research departments on tourism skills</li> <li>Education of young generations</li> </ul>	<ul style="list-style-type: none"> <li>Higher level of education required in touristic jobs</li> </ul>
3	Old models for coastal cities	<ul style="list-style-type: none"> <li>Higher involvement of government/public sector</li> <li>New tourism models</li> <li>Complementarity of strategies at the national/regional level</li> <li>Urbanization and sustainability in coastal destination</li> </ul>	<ul style="list-style-type: none"> <li>To involve and empower different stakeholders</li> <li>Synergies with institutions</li> <li>Flexibility in project policies</li> </ul>
3a	Preservation of local identities		
3b	Pressure on local population		

The second Focus Group, held in Rome, aimed at being the starting point of a process designed to involve stakeholders at regional, national and international level, through a continuous debate to be developed in each country over the following months. Even though the main structure was the same of the previous Focus Group, the objective was more general. During the discussion the gaps and growth strategies were identified and deepened, then were grouped into three main categories/path and listed in the table here below (14). The first of the three paths emerged deepens the sustainability of the model, referring to the development of a concrete off-peak season offer with integrated products and services that can help to encourage

and boost the demand side going beyond the sun-sea-sand main attractions, reducing the seasonality problem. The second path, which is strongly linked with the first one, pertains to the visibility of the MED area, meaning the building of a brand-new MED identity focused on a better knowledge of the demand segmentation and the involvement of a broad stakeholder alliance to work together against overcrowding and mass tourism. The last path is the one that involves increased tourism proficiency, since there are several gaps affecting jobseekers and employees in the MED area, specifically the biggest urgency is related to dignifying, qualifying and upskilling tourism careers and making tourism long-term jobs more attractive.

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In some cases, gaps and growth strategies are transversal to different paths and therefore repeated. They are the collection of single/multiple contributions made by the experts and other attendees, and summarize statements, examples, clarifications, data, sources of information, and so on, which are not included in the present document.

8. Table: Experts' recommendations coming from the Focus Group in Rome

Path	Gaps related to the path	Growth strategies related to the path
Sustainability of the model	<ul style="list-style-type: none"> <li>• Tourists' perception of the MED area</li> <li>• Lack of clusters with integrated vision</li> <li>• Lack of vision from institutions to invest in the whole territory and in infrastructure</li> <li>• Competitiveness gap</li> <li>• Lack of marketing strategies</li> <li>• Lack of data on the flow of stays related to tourism</li> </ul>	<ul style="list-style-type: none"> <li>• To create an integrated and diversified offer</li> <li>• Involvement and empowerment of local communities</li> <li>• Nautical Stations developed in France and Spain</li> <li>• Health and healthy well-being</li> <li>• Monitoring and measuring plan</li> <li>• Redistribution of tourists</li> <li>• Less taxes for SMEs</li> <li>• Empowerment of policy makers</li> <li>• Availability and strategic use of the necessary data and information</li> </ul>
Perception of MED area	<ul style="list-style-type: none"> <li>• Tourists' perception of the MED area</li> <li>• Lack of clusters with integrated vision</li> <li>• Lack of vision from institutions to invest in the whole territory and in infrastructure</li> <li>• Competitiveness gap</li> </ul>	<ul style="list-style-type: none"> <li>• To create an integrated and diversified offer</li> <li>• Med brand identity</li> <li>• Monitoring and measuring plan</li> <li>• Empowerment of tourists</li> <li>• More rules for tourists</li> <li>• Empowerment of policy makers</li> <li>• Availability and strategic use of the necessary data and information</li> </ul>
Increased tourism proficiency	<ul style="list-style-type: none"> <li>• Lack of professionalism</li> <li>• Lack of marketing strategies</li> <li>• Lack of policies</li> <li>• Lack of regulations on services provided</li> </ul>	<ul style="list-style-type: none"> <li>• Higher level tourism</li> <li>• Dignifying of tourism professions and boosting quality employment</li> <li>• Upskilling</li> <li>• Empowerment of tourists</li> <li>• Socially responsible programs in the private sector</li> <li>• Availability and strategic use of the necessary data and information</li> </ul>



## Conclusions

Experts involved in the discussion on Coastal and Maritime Tourism, have contributed to highlight and deepen the major challenges affecting tourism sector in Med Area and expressed their solutions on how to foster future sectorial growth.

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When it comes to uneven development levels in the tourism sector, the sharing of good practices and the support of entities who already faced the same issues in a certain environment is the key to speed up the growth process, releasing a territory from specific pressures and boosting the growth of the sector. Collaboration and a constant exchange of information and of progress updates are the fundamental pillars to put in place this kind of actions.

According to the guidelines suggested by the experts during the first Focus Group, the general approach to be followed when tackling this matter is to consider where the starting line is, and what goals are pursued and hopefully will be reached. In this specific case, the main challenge is not to decrease the number of tourists, but how to cope with them, also considering trends and forecasts which state that their number will keep raising in the forthcoming years. No country representatives involved in these meetings ever expressed the will to stop or lower the tourist flows, because tourism is such a powerful economic engine that can positively trigger the wealth of coastal areas and, if well managed, also the of inner areas. At the same time, the challenge is also how to avoid damages to Med identities and destinations, given the overflow of tourists visiting the Mediterranean coasts and threatening cultural, natural and social heritage. To welcome more people in a single territory means that destinations need to complement what is the traditional supply, with the promotion of alternative products able to diversify and extend the range of offers and attractions available, e.g. by the implementation of new business models. Parallel to this aspect, tourist accommodation and other related facilities and services should increase the length of the opening season, to take advantage of different branches of tourists travelling in off-season, thus offering multiple attractions beyond sun-sea-sand and reinforcing the local economy and the positive reputation of the coastal destinations all over the year. A virtuous cycle in which more and more economic actors can take advantage of a longer high season should be developed, by promoting different products depending on the time of the year, increasing the average stay rate and reducing the pressure on the territories by redistributing tourists. Preservation of heritage in all its forms is a must that needs to be kept in mind while developing new offers, as the core of attractiveness and competitiveness and therefore as peculiarity of a single territory. While promoting and putting in action this plan, it's crucial for local stakeholders to be engaged in this process and to learn to cope and to work together for the sake of their own territories. Also, regional and local policy makers should adopt ad hoc policies that reflect concrete solutions for tourism trends threatening the local environments, e.g. with smart tourism solutions, integrated tourism offers, empowerment of tourists.

Last recommendations of experts are taken from the second Focus Group and can be somehow overlapped with the ones taken from the first one. Rephrasing what has already been mentioned above, the growth of the sector lies in off-peak season offers, in building of a MED identity, and



in tourism proficiency. Some of the most underlined examples and actions suggested to be put in place and taken from the experts' contributions refer, for example, to:

- the process of data collection and analysis in order to take more acknowledged decisions;
- the active involvement and empowerment of local stakeholders (from communities to policy makers);
- the creation of diversified and integrated offers with exclusive and unique experiences as added value;
- the development of new awareness and perception of the local communities from the point of view of tourism demand, specifically on tourists' willingness to pay for local products with higher prices that reflect the added value and sustainable behaviours;
- the upskilling and qualifying of working conditions in tourism sector with the adoption of digital technologies and adaptation of job organization to the digitization process;
- the flourishing of social training programs for employees in private companies;
- and much more.

The three paths identified (sustainability of the model, perception of MED area, increased tourism proficiency), if well implemented by taking many small actions to tackle the bigger issues, as per the examples above, should be able to reduce the negative impacts coming from overflow and mass tourism, seasonality, and old growth patterns for coastal cities. Some cues to be mentioned and coming from the tourism experts' voices are:

- the creation of trans-regional/national plans to create clusters and partnerships for the improvement of their networks;
- the building of virtual monitoring centres to share and compare standardized data;
- the integrated offers of cross-selling products related to new tourism segments, e.g. silver population, medical tourism.

From the policies point of view, it's possible to mention:

- the decrease of bureaucracy to help SMEs to promote their businesses;
- useful data included in action plans of former and ongoing projects to be possibly inserted in regional operational programs;
- adopting a transversal approach by encouraging the interaction with different local actors and engaging multiple stakeholders indirectly involved in tourism sector, e.g. in the agri-food value chain;
- actions to promote innovation and IT systems to create synergies in data collection and exchanges in favour of smart tourism.

Thanks to all the recommendations given by tourism experts, if correctly adopted, it will be possible to achieve the goal to run towards a sustainable sectorial growth of Coastal and Maritime Tourism in the future.

## 4. OVERVIEW OF GAPS AND GROWTH OPPORTUNITIES

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About the current EU initiatives and strategies, the comparison of various countries' competences ranging from local responsibilities to national-scale policies and the analysis of over 40 tourism-related projects from the last 12 years clearly shows the importance of tourism (and all its related issues) in the Mediterranean. These strategies, policies and projects cover a wide area (both geographically and thematically); they identify several issues and they search for various innovative solutions to combat these issues. They also highlight the tourism-related strengths and opportunities that can lead to significant growth at national level but also beyond.

However, the analysis also shows that not all areas (again, both geographically and thematically) are equally covered. When considering the scope and theme of new initiatives, policies and projects, it is important to consider the currently identifiable gaps not addressed by ongoing policies or current projects. It is also important to highlight the growth opportunities that come from a successful programme, from good national or local practices, or from innovative projects. The following chapter is a short overview of these gaps and growth opportunities as seen from the perspective of PANORAMED thematic priorities.

### 4.1 GAPS AND GROWTH OPPORTUNITIES BASED ON EXISTING EU INITIATIVES AND STRATEGIES

#### **Gap: Geographical scope**

A minor gap regarding EU initiatives and strategies is the difference in the geographical scope of some of these actions. While several of the existing programmes cover the whole of the Mediterranean (or even all of Europe), there are macro-region focused initiatives (such as WESTMED for the Western coasts of the Mediterranean or EUSAIR for the Adriatic-Ionian Region) focusing on relatively smaller areas. This does not necessarily present a problem – a smaller geographical scope allows a greater focus on the peculiar characteristics and specific issues of a (relatively) smaller region, as long as all regions have their initiatives with similar priorities, actions and similar relative funding. But as experienced with larger projects (especially horizontal projects), larger visibility and larger cooperation leads to a larger impact than smaller, more isolated actions. This kind of cooperation is more easily achieved with initiatives and strategies that include as many countries as possible.

#### **Gap: Thematic priorities**

Not all issues are equally important, and understandably not all issues are treated as equal. Some issues represent clearer and more urgent problems that can (and should be) addressed sooner and with a larger emphasis. This is shown by not just the thematic priorities of EU strategies, but also by national policies and competences (e.g. thematic areas like Maritime transport have less coverage) and by the objectives of individual projects (e.g. the analysed projects could be grouped together into as few as three groups based on their main goals).

Because of the unequal weight of possible issues, it is not necessary to make every single priority of the same importance. However, it is very much recommended in future programming to constantly re-evaluate the importance of various priorities and give them more attention if needed. Currently the priorities that appear to be treated as less important include maritime littering and pollution, fisheries and aquaculture, maritime transport, energy efficiency and climate change.

### **Gap: Seasonality, overtourism and changing tourism practices**

These gaps are grouped together, due to the nature of the problem being the same: EU-level strategies, initiatives have a harder time addressing more current and faster changing issues, since only the preparation of any EU programming can take years (and the programmes themselves remain active for years), and the circumstances at their creation may no longer be completely true or relevant at the end of their runs. (This is of course also true on a smaller scale: due to the fast changes in tourism practices, projects aiming at specific issues can take years to be developed and implemented while issues keep growing and changing).

Seasonality and overtourism are primary characteristics of most tourism-related activities. Seasonality itself is not necessarily an issue, but the related problems are very much so. An unbalanced overflow of tourism puts an increased pressure – environmental, social, economic – on the affected areas. When looking at statistics, what seem like manageable numbers in terms of yearly averages, can mean unmanageable problems during high seasons. Seasonality and overtourism are hard to deal with in terms of EU-level actions, since they are usually local issues with big differences in their causes, durations and possible solutions to their problems, even within a country. A way to possibly address these gaps is to keep all these differences in mind when planning for the next programming period; and instead of relying on year-old statistics, keeping up to date with available tourism data. Experts suggest bottom-up data collection, for which the framework and funding should be set at EU level.

Changing tourism practices can be the cause of both seasonality and overtourism, but they can also be the solutions to these issues. Lack of adaptation and a delayed response to these changes can lead to the intensification of the issues, but conscious pre-emptive planning, the creation of new tourism-related products and integrated tourism offers in off-season, the adoption of smart tourism practices, the popularization of new locations can help mitigate the problems and create a more balanced flow of tourism. This is also hard to address from an EU point of view due to the heavily localized nature of the issues.

### **Growth opportunity: Transnational cooperation**

The examples of ongoing or already completed projects show that smaller, more isolated/localised project can lack the desired visibility and impact needed to make meaningful changes. However, larger collaboration between multiple countries allows the creation of communities with a shared identity and a common goal, that can learn from each other and produce results that benefit larger regions. The existing programming lead to several good examples of transnational cooperation, and as a growth opportunity, the existing cooperation possibilities should be expanded in future initiatives.

### **Growth opportunity: Sustainability**

Sustainability, along with related concepts such as blue growth is a key recurring principle that is present in EU-level programming as well as national regulations and individual projects. Sustainability doesn't simply present a growth opportunity because of its ubiquitous nature, nor because it should warrant even more attention than it already gets. Sustainability is primarily a growth opportunity because of how it affects multiple issues on all scales (both geographical and temporal). For example, using sustainable energy reduces the strain put on the natural environment (decreased pollution, no exploitation of finite resources along with its undesired side effects), helps preventing the effects of climate change (which in long term could lead to the eradication of coastal areas when not reversed), and it has a direct positive effect on a region's economy. And sustainability goes beyond the natural environment – as successful examples had shown, the smart and sustainable use of the built environment or even the preservation of traditions can foster growth without endangering these values. As these examples all show a more localised approach to the issues of sustainability, the EU-level strategies cannot address every related issue; instead they can (as they already do) provide the necessary framework and funding.

### **Growth opportunity: Innovation**

The topic of innovation is very similar to (and often synonymous with) sustainability. Innovation is an important growth opportunity; not just because of its major and frequent appearance on every level, or because it would probably deserve even more attention, but also because it often provides the solutions to most issues that were mentioned before, or provides the tools and methods needed to reach complex goals. Successful examples show how innovative projects can provide the data needed by EU and national policy makers to make up to date regulations. Innovative solutions can help regulate overtourism and seasonality, give new ways to decrease environmental pollution and prevent climate change. New smart technologies are applied and used to protect the traditional built environment. Just as with the priority of sustainability, innovation is mostly realized through more localised efforts. The growth opportunity on the level of EU strategies mostly means to further provide the basis of these innovative projects.

## **4.2 GAPS AND GROWTH OPPORTUNITIES BASED ON EXISTING POLICIES AND COMPETENCES IN MEDITERRANEAN COUNTRIES**

### **Gap: Thematic priorities (unequal weight and overlap)**

The comparison of the competences of national, regional and local authorities in 12 Mediterranean countries (as detailed in Chapter 2) showed that the three main thematic priorities relevant to PANORAMED WP5 are not treated equally. The priority of Innovative and sustainable tourism offers appears in all the 12 countries, with almost twice the frequency as the following Integrated coastal and maritime tourism which appears across 8 countries. The apparently least regulated priority of Maritime transport linked to tourism cruises is covered by 7 countries with even less frequency. The reasons for this cannot be explained solely within the

frameworks of this analysis. Presumably the numbers are closely related to the importance of these priorities as well their need for regulation. Since these competences are mostly internal affairs of the countries (or even that of multiple entities within a country), the unequal coverage cannot be fully understood without knowing the internal affairs well. Because of this, at the time no meaningful suggestions can be given to cover this gap (or whether if this is actually a gap).

A related potential issue is the frequent overlap between the three thematic priorities, most frequently between Innovative and sustainable tourism offers and Integrated coastal and maritime tourism (the overlap refers to the same authorities with the same competences dealing with issues from these two, or sometimes all three priorities). The cause of this can come from two directions – either the thematic priorities have too much overlapping content, or – and more likely – the countries view these priorities as very similar and they become grouped together. Similarly to the previous paragraph, this is not necessarily a real gap – the practice may work very well for any given country, and without fully knowing their internal affairs, this cannot be evaluated correctly. If this indeed is a gap, making the priorities even more distinct and separating all overlapping areas could be advisable in the future.

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#### **Gap: National versus local authorities**

More a general truth than a specific observation, and hardly surprising: in basically all of the observed countries, the competences of national level authorities give them broader but more generic responsibilities while local level competences allow for more specific tasks but open with limited power. This is also apparent on the level of EU initiatives as well as in other areas not related to tourism, and this is not necessarily a gap by itself, as the distribution of competences might work well as they are now, especially with the inclusion of all intermediate level competences from regional to inter-municipal ones. For any country where this is indeed identified as a gap after a deeper study of their policies, a possible solution would be to insert more of these intermediate level authorities with varying degrees of power to give every issue the amount of attention it needs.

#### **Gap: Seasonality, overtourism and changing tourism practices**

The issue presented here is the same as in the Chapter 4.1. Compared to the EU-level, the biggest difference is that it is perhaps easier to make a more meaningful impact in dealing with seasonality and overtourism at a national level, as the more specific factors are better known, and they are perhaps easier to be adapted to the issues. The problems of the EU-level can still be present – national level authorities might be too far from the problem and their solutions too general to address a specific issue while local level authorities might not have sufficient responsibilities or funding to deal with them. But it is far more likely to have a solution at these levels and indeed, several countries show that their competences include ways of dealing with these issues. Similarly to the previous one, a possible way to close this gap is to re-evaluate and redistribute the responsibilities of authorities of all levels to allow for more direct and specific actions.

### Gap: Data flow

The perceived gap of insufficient data flow between the various authority levels comes from the contributions of the associated partners, but it is further confirmed by both EU-level issues and specific goals of several projects that try to introduce new methods of gathering and distributing data. This is closely related to the gaps of seasonality/overflow of tourists, as up to date data and its dissemination would be key factors in closing this gap. Tourism and tourism related data are not measured the same way in all of the 12 countries, and while there are suggestions for international frameworks to homogenize these efforts, these are only guidelines.<sup>30</sup> Proper data collection – and ensuring its proper flow to all levels of authorities could ensure more effective actions.

### Growth opportunity: Distribution of responsibilities

Closely related to the “National versus local authorities” gap, best practices from the observed countries show that the central government giving more responsibilities to intermediate or local level authorities can possibly increase the effectiveness of dealing with various tourism-related issues, especially when their causes are more locally based. As all countries are different and every issue can be different as well, there is no universal way on how to make this distribution properly, but when a proper solution is found, it can help closing almost all national level gaps.

### Growth opportunity: Adaptation of successful models

As mentioned in the previous paragraph, there is no universal way of distributing responsibilities. However, the comparison of the competences of the 12 countries does show a lot of similarities when comparing countries with a similar size and similar administrative distribution. While the direct copying of a particular practice from a different country may not work unaltered, proper adaptation can ensure the best practices carried over. Both overarching EU initiatives and successful transnational projects can help to find the common grounds needed to successfully adapt governance models from other countries.

## 4.3 GAPS AND GROWTH OPPORTUNITIES BASED ON THE ANALYSED PROJECTS

### Gap: Lack of impact for smaller / localized projects

Long term results and aftereffects of successful projects show that not all achieved results – despite providing good solutions to serious problems – live long enough to have a meaningful impact. Usually a project’s smaller size or narrower geographic focus is what keeps it from making an echo in a wider, national or transnational radius. Sometimes they lack the visibility to make it to the necessary authorities or stakeholders or even to the general public. The solution to close this gap is already clear, as other projects have shown the greater effect that a larger

<sup>30</sup> for example: World Tourism Organization (UNWTO) & International Labour Organization (ILO): Measuring Employment in the Tourism Industries (Guide with best practices)



cooperation can make. (See below in growth opportunities). Another solution can be the strengthening of visibility and multiplying the results of the smaller / localized projects.

### **Gap: Seasonality, overtourism and changing tourism practices**

Perhaps the most prevailing issues as it appears in all levels, seasonality and overcrowding (and the changing tourism practices that both cause and might solve them) are closer to their source at the level of the projects. Basically, all of the analysed projects touch upon some of these issues, showing the gap is real, but also that there are proposed (or executed) solutions that can help to solve them. The unequal environmental and social burden that is placed on selected regions during selected periods of time becomes even more clear when viewing it through the local lenses of specific projects. Their point of view can help both national- and EU-level authorities when considering new tourism-related policies and initiatives.

### **Gap: Lack of vision, lack of professionalism**

Confirmed by the observations of the horizontal projects, and closely connected to the “Lack of impact” gap, several smaller projects suffer from a lack of vision – their aims and results are sometimes motivated only by personal gain or focusing on short-term solutions. This is often coupled with a perceived lack of professionalism that in the eyes of the civil society can be associated with the tourism-related services and industries.<sup>31</sup> This often results in the above-mentioned issues that is reflected on a general negative impression on these projects. The possible solution to this once again is to focus on larger-scale projects with a clear vision and a longer lasting impact.

### **Growth opportunity: Cooperation and communities**

To strengthen the visibility and impact of projects, successful examples like the three horizontal projects analysed in this document, show that a larger transnational cooperation that is known by all relevant authorities and the civil society can have better and longer lasting effects than its smaller-scale counterparts. The examples of the Sustainable Tourism Community, the Urban Transport Community and the Biodiversity Protection Community show that by shaping the individual projects into communities with a unique identity can both increase motivation and effects within the community itself and help with the positive outward assessment of it. All three of these communities have also shown how important communication – both within the community and between the projects and the authorities and the public – can be to help reach desirable results and to integrate them in national and transnational policies. Creating similar communities and maintaining them beyond the durations of their projects can ensure further growth opportunities on the communities’ areas of interest.

### **Growth opportunity: Differentiating tourism, new tourism products**

Although the issues of overtourism and seasonality arose frequently across all observed levels, the projects surveyed have shown several ways to potentially counter these adverse effects. The

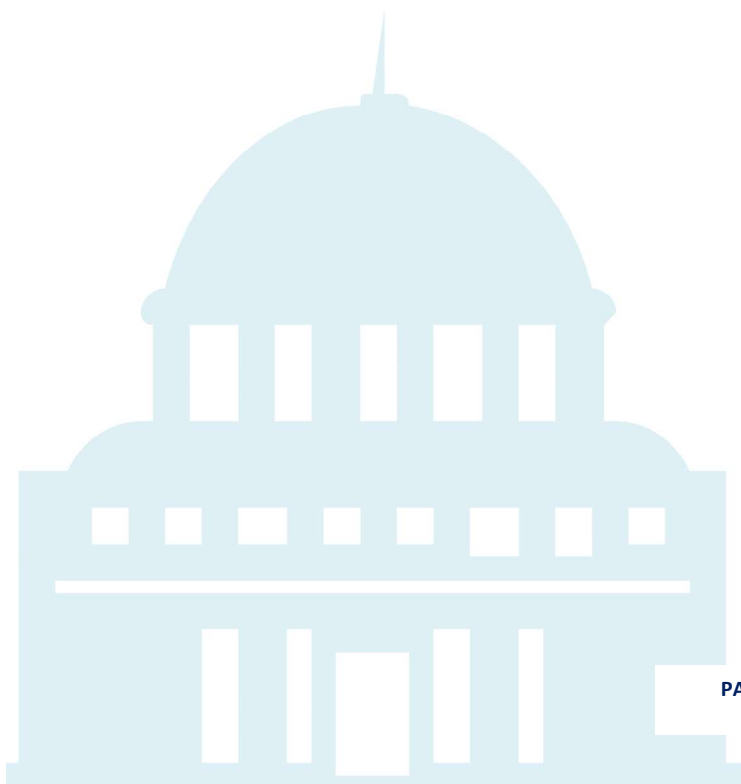
<sup>31</sup> World Tourism Organization (UNWTO) & International Labour Organization (ILO): Measuring Employment in the Tourism Industries (Guide with best practices)



main growth opportunity here is the differentiation of the tourism offers, possibly in an integrated way. By changing the flow of tourism, popularizing less frequented destinations or off-season times, the existing natural/social/economic burden can be mitigated while still achieving growth in the tourism and related sectors. The ways of differentiating the tourism offer can vary, but several of the assessed projects suggested (and executed) the introduction of new tourism products into their areas, such as thematic tourism (e.g. bicycle tourism, fishing tourism, culinary tourism), in order to build new/better integrated tourism offers. Smart tourism and its related services could also bring several benefits to the sector. This way it's possible to either expand or redefine the identity and associated values of an area, furthermore the possibilities are infinite as they are closely tied to tourism at local level.

### **Growth opportunity: Innovation**

Most of the times innovation is not the goal itself, but just a tool to help reaching this aim. As successful projects have shown, innovative solutions can create instruments and methods that can serve far beyond their intended scope. As an example, new innovative methods (e.g. smart solutions) can help in collecting and distributing information across various authorities and stakeholders, the importance of which was already explained. Because of this, the growth opportunity here is not just the creation of innovative solutions, but also the use of both existing and new solutions in a new innovative way in closing any of the gaps above on all levels. Innovation is often associated with technological innovation which can be seen as incompatible with the natural environment or protected built landmarks, but successful examples have shown that old and new, natural and man-made can work very well together in protecting existing values and creating new ones.



## 5. CONCLUDING REMARKS

Tourism is the third largest export category in economy and a major source of income for several countries. With Europe as the leading tourism destination and the Mediterranean countries leading the constant growth in this sector, sustainability becomes an increasing issue. Seasonality and overcrowding of popular coastal and maritime destinations lead to increased environmental, social and economic pressure, affecting both natural and cultural heritage as well as the quality of life of local populations. As a general effect, development without respect for the principles of sustainability brings a gradual but constant deterioration in the tourism experience, thus threatening the identity of each destination.

To tackle the various challenges of tourism, numerous policies and initiatives are in place, from local to international and transnational level. However, these policies and legislations cannot account for every issue that tourism raises, or they do not address these issues at the right targeted level. Topics related to tourism but perceived as neglected include environmental pollution in the coastal area, maritime transport, fishing and agriculture, energy efficiency, seasonality and innovation – and these are just a few examples. Public and private stakeholders should aim to increase their involvement in future policies, programs and initiatives with regards to these secondary areas, following and supporting the initiatives during their whole length.

On the other side, much has been done in addressing issues and finding solutions. The different results of the analytic work and the meetings carried out in the past months were needed to emphasize the final remarks of GGOR. Thanks to all the contributions gathered in this document and coming from a variety of sources, the GGOR can be considered a funnel-shaped instrument able to show the main achievements to be reached for what concerns Coastal and Maritime Tourism.

Following the previous statements, a first aspect to pay attention to relates to the attractiveness and competitiveness of Mediterranean area. It is important to reduce the pressure on territories hit by mass tourism, overcrowding and seasonality and redistribute the visitors all over the year, extending the range of off-season and integrated tourism offers and attractions available, e.g. through cross-selling products for new branches of tourism and smart tourism practices. Another statement refers to the involvement of local stakeholders both in levelling-up the capacity building of the tourism sector and in the implementation of more pilot actions, e.g. interacting with those stakeholders involved in tourism sector in an indirect way. Furthermore, it is highlighted also in the experts' recommendations chapter that the participation of public actors, including both institutional and policy-makers subjects, is crucial. The higher their presence and guidance in the correct development of the projects, the better the positive impacts in policy changes and mainstreaming activities. To create better synergies with policy instruments, implementations of best practices and other effective instruments should involve both the institutional and technical level, as a favourable condition for the putting in place of the initiatives. The decision-making process should also take advantage of virtual monitoring centres in order to use the information available to take better and more precise actions, tackling specific aspects and solving the most urgent matters in endangered tourism destinations. Related to smart tourism, promotion of innovation and IT systems to create synergies in data collection and exchange of information should be considered, too. Of great help in the improvement of the network could be the creation of transnational and transregional plans to build clusters and partnerships.

Assessing projects both finished and ongoing from previous and current programs and initiatives, despite the relatively small number of projects analysed, is an important way to analyse and recognise successful improvements already made to increase the sustainability of tourism. For example, it was stated that the projects developed so far and that have a sectoral approach are aiming not just at the creation of tools but also at the production of contents such as itinerary building and the diffusion of thematic tourism products, thus carrying on specific purposes to improve a better integrated tourism offer under many aspects or to empower tourists. On the other side, the identification of common issues and needs is the starting point to build specific calls in future initiatives and projects to strengthen the values shared in the MED areas, to further build new encouraging results and to promote successful best practices to be shared and implemented in similar contexts, also outside of national borders.

A specific mention is left for Interreg Med Horizontal Projects (HPs) and PANORAMED Associated Partners (APs). The creation of small project communities on tourism, that converge to a bigger one, gives to HPs a unique identity, improving visibility, capitalization and mainstreaming results related to the many projects involved in their orbits. This refers also for PANORAMED project and, specifically, for the outcomes of WP5 GGOR on coastal and maritime tourism. Also, the presence of APs within the project is useful in the identification of other areas of intervention from the ones carried out with desk and field analysis and Focus Groups, thus increasing the spectrum of the analysis that this document can develop.

As more projects related to coastal and maritime tourism are developed and then come to an end, the findings included in this document can be reassessed, this involving a general review of gaps or growth opportunities, with a possible shift towards uncovered or future issues. It is important to bear in mind that coastal and maritime tourism is an active subject, meaning that after a certain amount of time the need to review the priorities and the trajectories listed is unavoidable. This requirement comes from the change of the needs related to specific policies put in place and giving positive or negative effects depending from each situation and context, thus generating new necessities to be collected and addressed to the right entities.

