

“DUE MARI” next generation tourism

Interreg - IPA CBC
Italy - Albania - Montenegro 

Interreg - IPA CBC
Italy - Albania - Montenegro



DUE MARI

Deliverable 2.2.3

Common Strategy for Due Mari Route and Action plan





Index

Index	2
1. Molise region	4
2. Introduction	4
2.1 Geographical location of point of interest	5
2.2 Nature and landscape	7
2.3 Culture, economy and demography	8
3. Tourism in Molise	8
3.1 Key fact on tourism in Molise	8
3.2 Existing tourists' offers and infrastructure near in Molise near point of interest	10
3.4 Touristic Offers	12
3.5 Challenges and opportunity	14
4. Developing the strategy	15
4.1 Vision For tourism in Molise	15
4.2 SWOT	16
4.3 ACTION PLAN	18
1. Montenegro	19
1.1. Nature and landscape	19
1.2. History and culture	20
1.3. Economy	20
2. Tourism in Montenegro	21
2.1. Challenges and Opportunities for tourism in Montenegro (SWOT).....	22
3. Participatory mapping – POI's	23
3.1. Data gathered per region	25
3.2. Existing tourists' offers and infrastructure upon the POI-s	26
4. Promotional activities on the project relevant for POI's	28
4.1. Further activities.....	29
1. Albania	30
1.1 Geographical location of Points of Interests	30

1.2 Nature and landscape.....	30
1.3 Culture, economy and demography	30
2. Tourism in Albania	31
2.1 Key facts on tourism in Albania	31
2.2 Existing tourists' offers and infrastructure upon the POI-s.....	32
2.4 Challenges and Opportunities (SWOT)	32
3. Participatory mapping	35
3.1 List of selected POI-s	35
3.1 List of selected POI-s	35
3.2 Map of the selected POI-s.....	41
3.3 Tour Operators and involved stakeholders.....	41
4. Action Plan – Developing the strategy	42
4.1 Platform long term vision for integrated digital tourism in Albania	42
4.2 Policy context.....	43
4.3 Action Plans	44
1. Puglia	45
1. 'The structure of the developed platform	45
1.2 European pillars chosen for implementing Tourism Policy Development	45
3 Step 2.....	48
3.1 Key facts about the tourism industry in the reference area	48
3.4 The existing communication channels and information materials	49
4 Step 3.....	50
4.1 Survey analysis and outcome workshops and focus groups with stakeholders.....	50
7 Step 5.....	52
7.1 Stakeholder workshops and good practices.....	52
7.2 The importance of Training in tourism sector, especially of digital training to support Smart Destinations.....	52
8 Step 6.....	53
8.1 Indicators to monitor the implementation of the Action Plan.....	53

1. Molise region

2. Introduction

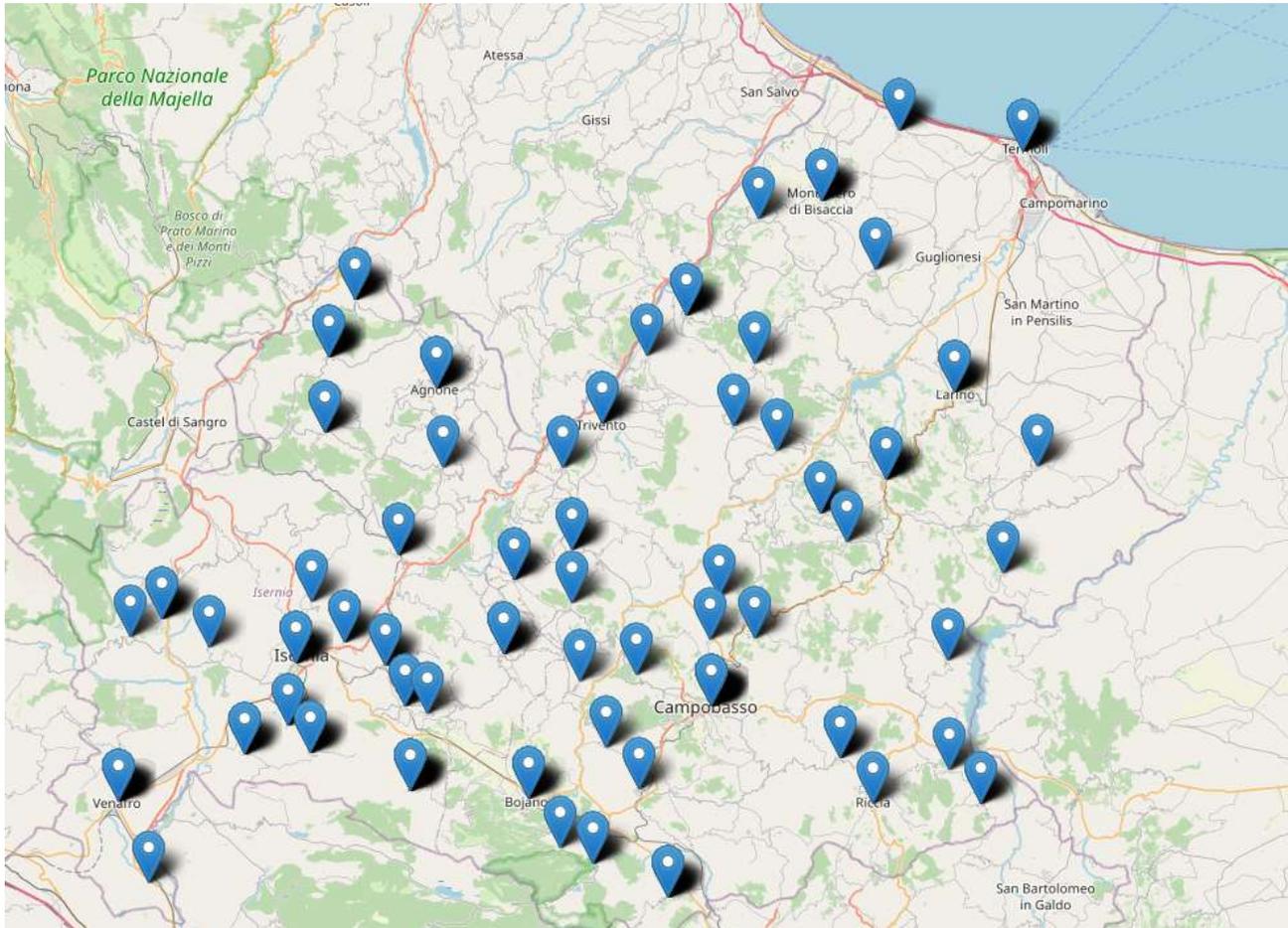
Endowed with a territorial area of only 4,438 km², Molise is the second smallest region in Italy after Valle d'Aosta, characterized by a predominantly mountainous and hilly profile (55.3% and 44.7% of the area, respectively), with a short stretch of coastline extended for 35 km. However, the territory is distinguished by a high diversity from a geological-environmental point of view (with at least 6 structural tectonic units composing the Molise Apennines), which is obviously reflected in its physiographic and landscape features. This conformation particularly affects the high conditions of seismic risk, coastal erosion, water dispersion and landslides⁸⁴. In terms of population, Molise has, according to the most recent ISTAT data (2018), 308,493 inhabitants. The population decline is evident considering the evolution of residents between 2012 and 2018.

GDP trends in Molise between 2014 and 2019, compiled from ISTAT data, show a seesaw trend and overall weak growth⁸⁵. It is, moreover, a trend in line with the low recovery rates of the national economy. According to consolidated data provided by the Bank of Italy⁸⁶, in 2018 the Molise economy showed a slight improvement after the previous year's downturn. Some positive signs for the region come from foreign trade, which, although influenced by cyclical components, has shown signs of dynamism in the last period.

Molise presents states of backwardness in multiple sectors, characterized by structural weaknesses and historical conditions of backwardness in multiple respects (poor relational dynamism, weak productive structure, limited propensity for innovation, low level of specialized skills, insufficient quality of tangible and intangible infrastructure, demographic decline). This condition is confirmed, moreover, by the region's performance indices, which, according to the preliminary acts pertaining to the 2021-2027 programming by the European Union, lead to a downgrading of the territory by including it among the areas comprising the least developed regions. From a specifically tourist point of view, as will be discussed more extensively in the following paragraphs, Molise records, in terms of overall attractiveness, insignificant results and a weak and, on many occasions, distorted image emerges. However, this condition constitutes a starting point on which to set and define intervention strategies that this plan intends to focus on.

2.1 Geographical location of point of interest

Geographical Location of point of interest



In relation to tourism resources, mapping was conducted through an in-depth survey carried out by consulting and analyzing documents, institutional websites of municipalities, social networks and any additional available sources in order to collect as much data and information of the resources considered to be of tourism interest in the following categories:

- Museum heritage;
- Castles of tourist importance;
- Landscape resources;
- Archaeological sites;
- Religious buildings of historical and cultural interest;
- Traditional/religious events;
- Festivals and food and wine events;
- Cultural/musical events;
- Quality circuits (blue flag and orange flag);
- Traditional products and quality labels;
- Supporting services and entertainment (theaters, cinemas, sports facilities, dance halls).

The categories identified are quite broad: the intent was, in fact, to map as exhaustively as possible the territory of Molise. Although an attempt has been made to achieve the greatest level of depth possible with

the material available to date through the use of a wide range of quantitative and qualitative information, it is not excluded that the survey could be expanded with the enhancement of additional resources, in a logic of continuous updating of the Plan. The data, in order to make it easier to read, have been organized in tables that contain, as common information for all categories, the indication of the resource, its location, a brief description and any useful links to consult for further study. The mapping of tourism resources also contributed to the development of the Tourism Attractiveness Index (See Section 3.8), which summarizes the information. The survey has, in some unexpected ways, revealed the richness of a wide and diffuse heritage: in fact, almost every municipality has its own particularity, a place of interest rich in tradition and history that identifies it, around which a sense of belonging of the community that inhabits it has developed. It has emerged that even the smallest municipalities in Molise have their own wealth.

By way of example: the town of Duronia in the province of Campobasso, with a population of about 400, is home to the Castel di Sangro-Lucera sheep-track, the Civita stronghold of the Samnites and a Samnite enclosure with grave finds; Castropignano, in the province of Campobasso, with a population of about 900, is home to the Park of the Cenozoic Morge of Molise, is crossed by the Castel di Sangro-Lucera sheep-track, holds the Castello d'Evoli, the Sanctuary of the Madonna delle Grazie and the Sanctuary of the Madonna del Peschio. The province of Isernia is not to be outdone: the town of San Pietro Avellana, with about 500 inhabitants, in addition to being (little) known for being the home of the white truffle, has a wealth of respectable riches; in fact, it houses the Museum of Civilizations and Period Costume, is crossed by the Celano-Foggia sheep-track, and is home to the San'Amico Sanctuary, dating back to the mid-1700s. Mention should also be made of Rocchetta a Volturno (population 1,080), which is home to the International Museum of the World Wars, is one of the municipalities of the Abruzzo, Lazio and Molise National Park, is home to the Battiloro Castle and the Sanctuary of the Madonna delle Grotte, and is also home to the better-known monumental complex of San Vincenzo al Volturno, which involves the territories of Castel San Vincenzo and Rocchetta a Volturno.

What certainly emerged from the analysis was: the richness of a preserved natural landscape, a substantial museum heritage (the Polo Museale del Molise manages and coordinates state-owned museums, galleries, archaeological areas and parks, monuments and historic buildings present in Molise), a large number of archaeological sites that are unfortunately little known, the heritage of the sheep-tracks, an abundance of food and wine, cultural and musical festivals and events, and, in general, a varied and unspoiled territory. Alongside the richness of the places, however, there is often a counterbalance to the poor usability of the sites, especially those located in the innermost areas, the fragmentation of a non-unified promotional and commercial management, and in general a poor valorization of the territory. The mapping conducted allowed in detail to detect the presence of 226 events and festivals, characterized by continuity over time, covering most of the municipalities of Molise; in the territory, moreover, there are a total of 20 products, classified as traditional or protected by quality marks, which, however, only partially represent the local potential for the enhancement of food and wine.

Risorse turistiche	Provincia Campobasso	Provincia Isernia	Totale Molise
Patrimonio museale	10	18	28
Risorse paesaggistiche	60	50	110
Castelli di rilevanza turistica	40	25	65
Siti archeologici	36	7	43
Edifici religiosi	37	28	65
Eventi tradizionali/religiosi	98	43	141
Sagre ed eventi enogastronomici	23	23	46
Eventi culturali/musicali	28	11	39
Circuiti di qualità	2	3	5
Marchi di qualità	12	8	20
Servizi di supporto ed entertainment*	55	37	92

2.2 Nature and landscape

Nestled in the heart of Italy, Molise is a region of astonishing natural beauty, often overlooked by tourists in favor of its more famous neighbors. Its landscape is a remarkable tapestry of diverse terrains, ranging from rolling hills and fertile plains to densely wooded areas and towering mountains. The Apennine Mountains, extending through Molise, provide a spectacular backdrop that has long enchanted those who venture into the region. This diverse topography makes Molise an outdoor enthusiast's dream, offering a wide range of activities, from hiking and skiing to wildlife observation. Molise is home to several national parks and protected areas, the most notable being the Abruzzo, Lazio, and Molise National Park. This vast expanse of pristine wilderness is a haven for nature lovers, with rugged mountains, dense beech forests, and clear mountain streams. The park is not only a paradise for hikers and nature enthusiasts but also serves as a refuge for a variety of wildlife species. Among them, the Marsican brown bear, one of Italy's rarest and most iconic animals, finds shelter here. The park's undisturbed landscapes provide a vital habitat for this endangered species, making it a sanctuary for conservation efforts.

While the mountains define much of Molise's character, the region also boasts a picturesque coastline along the Adriatic Sea. The Adriatic shoreline offers a stark contrast to the mountainous interior, featuring stunning sandy beaches, hidden coves, and charming fishing villages like Termoli. The crystal-clear waters of the Adriatic are inviting for swimming and water sports, while the coastal towns exude a unique blend of history, culture, and natural beauty. Visitors can explore ancient fortifications, sample fresh seafood, and soak in the tranquil atmosphere of these coastal communities.

What truly sets Molise apart is the proximity of these contrasting landscapes within a relatively compact geographical area. This means that travelers can embark on alpine adventures, such as hiking and skiing, and, within a short drive, find themselves lounging on pristine beaches or exploring coastal cliffs. Molise's nature is a well-kept secret, providing an unspoiled and authentic environment for those seeking to reconnect with the natural world. Whether you seek the solitude of the mountains, the tranquility of the coast, or a combination of both, Molise offers a remarkable diversity of landscapes and experiences for nature enthusiasts and wanderers alike.

2.3 Culture, economy and demography

Culture: Molise, one of Italy's smallest and least populous regions, boasts a rich and diverse cultural heritage. Its culture is heavily influenced by the historical connections to the Samnites, a pre-Roman Italic people, and the various civilizations that have inhabited the region over the centuries. Molise is known for its traditional folk music, dance, and festivals, which celebrate the region's unique heritage. The local cuisine is deeply rooted in rural traditions, featuring dishes made from locally sourced ingredients like lamb, cheese, and truffles. Molise's historic towns and villages are characterized by charming architecture, medieval castles, and religious festivals that continue to be an essential part of the cultural calendar.

Economy: Molise's economy is primarily agricultural, with a focus on small-scale family farming. The region produces a variety of agricultural products, including wheat, grapes, olives, and various vegetables. The hilly and mountainous terrain of Molise is well-suited for the production of high-quality wine and olive oil. Additionally, the region has some light industry, particularly in the production of textiles, food processing, and craftwork. However, Molise's economy faces challenges, such as a lack of large-scale industries and limited job opportunities, which have led to emigration in search of better employment prospects.

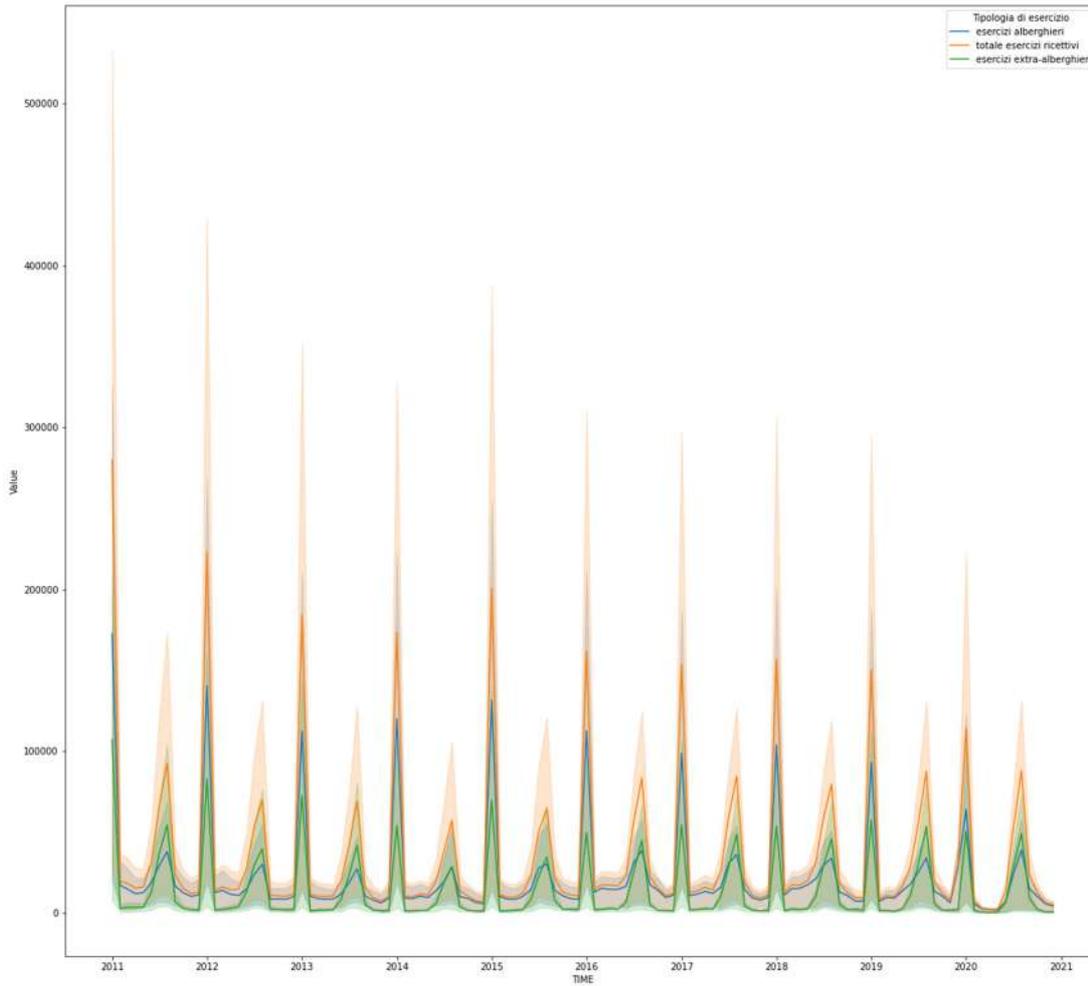
Demography: Molise has one of the smallest populations of any Italian region, with a declining trend in recent years. The demographic landscape is characterized by an aging population and a decrease in birth rates. Many young people from Molise have moved to other parts of Italy or abroad in search of better job prospects and educational opportunities. The population is concentrated in a few key urban centers, including Campobasso, the regional capital, and Termoli, a coastal town. Molise's demographic challenges are a concern for policymakers who aim to sustain the region's communities and ensure its economic and cultural vitality.

3. Tourism in Molise

3.1 Key fact on tourism in Molise

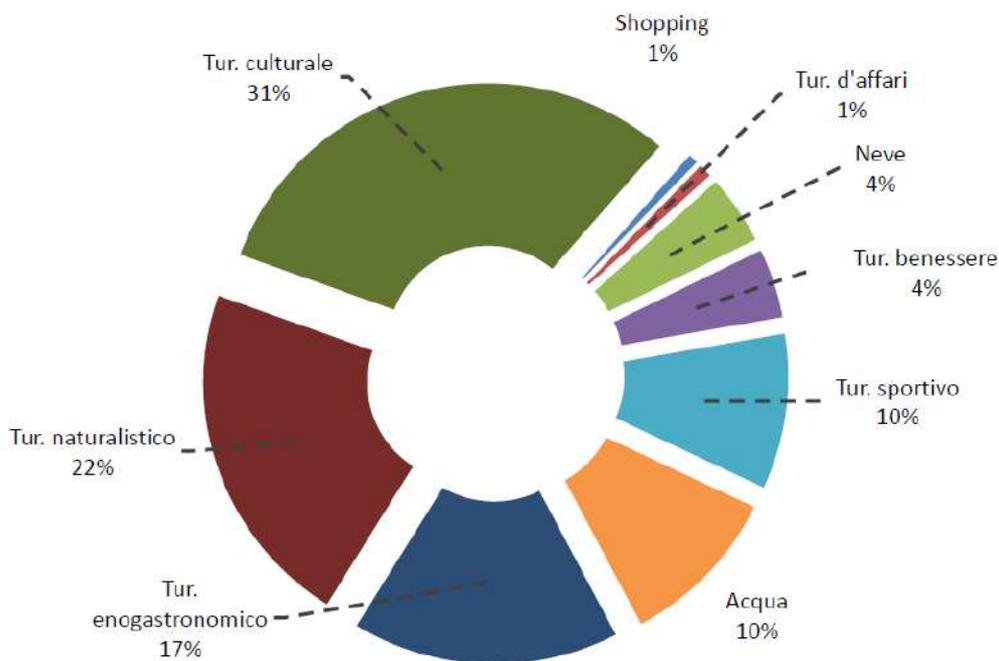
Tourism in Molise is often described as Italy's best-kept secret. While it may not receive the same level of attention as some of the country's more famous regions, Molise has been gaining recognition for its unspoiled natural beauty and authentic cultural experiences. The region's tourism industry primarily revolves around its diverse landscapes, including the Apennine Mountains and the Adriatic coastline. Visitors are drawn to Molise for activities such as hiking, skiing, and wildlife observation in the pristine national parks, as well as for the serene beach towns along the Adriatic Sea. This unique combination of mountain and coastal attractions allows travelers to enjoy a wide range of experiences within a relatively small area.

Molise is also known for its historic towns and villages, each offering a glimpse into Italy's rich cultural heritage. The region hosts numerous festivals, feasts, and events that celebrate its traditions, including local folk music and dances. Additionally, Molise's cuisine, deeply rooted in rural traditions, is a major draw for food enthusiasts, with dishes featuring locally sourced ingredients like lamb, cheese, and truffles. Despite being a hidden gem, Molise's tourism sector is steadily growing, attracting travelers seeking an escape from the crowds and a chance to explore an authentic, off-the-beaten-path Italian destination.

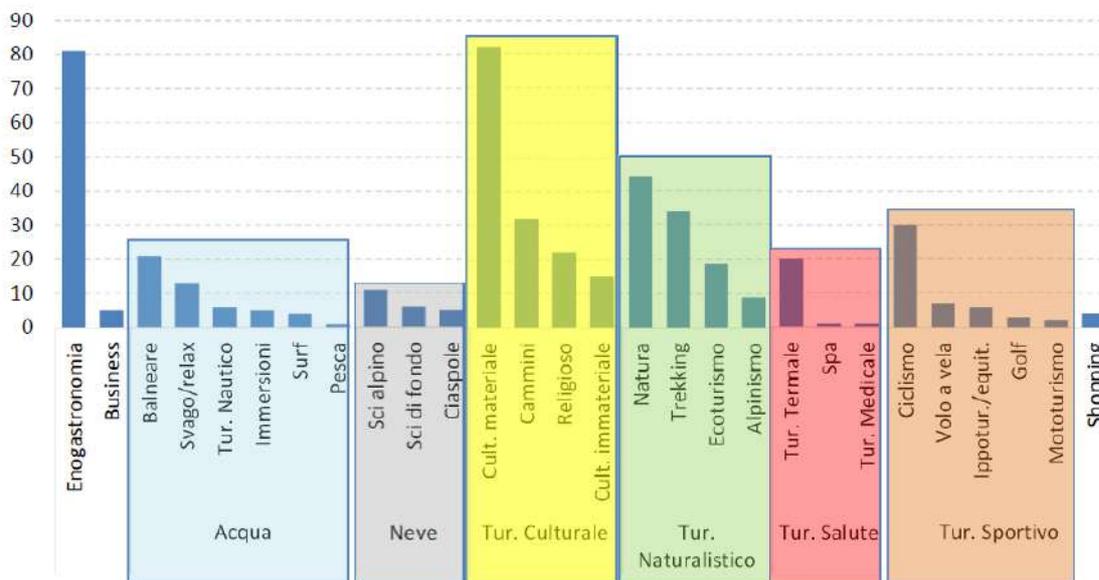


Number of Presence in Molise, 2011 – 2021 (Dati Istat, elaborazione nostra)

Graf. 2 Distribuzione delle destinazioni per macro prodotti turistici



Graf. 3 Distribuzione delle destinazioni per macro e sotto prodotti turistici



Elaborazione Dati Camera del Commercio del Molise

3.2 Existing tourists' offers and infrastructure near in Molise near point of interest

At the regional level, it is possible to note that for Accommodation services, the enterprises, on a percentage level, are made up as follows: 54.15 percent Individual Firms, 26.83 percent Joint Stock Companies, 17.56 percent Partnerships, 1.46 percent Other Legal Forms. On the other hand, for catering services, the

percentages are distributed as follows: 63.20% Individual Firms, 20.43% Partnerships, 15.29% Corporations, 1.08% Other Legal Forms. For services carried out by Travel Agencies and Tour Operators, the percentages are distributed as follows: 36.84% Individual Firms, 28.07% Joint Stock Companies, 24.56% Partnerships, 10.53% Other Legal Forms. For services related to creative and artistic activities, the percentages are broken down as follows 52.17% Sole Proprietorships, 24.64% Joint Stock Companies, 18.84% Other Legal Forms, 4.35% Partnerships.

For services related to activities carried out by libraries, archives, museums, and other cultural activities, the percentages are divided into 50.00% in Other Legal Forms, 16.66% Capital Companies, 16.67% Partnerships, and 16.67% Individual Firms. For services related to entertainment and amusement activities, the percentages divide into 37.12% Sole Proprietorships, 34.50% Corporations, 17.90% Partnerships, and 10.48% Other Legal Forms. At the regional level, analyzing the values in percentage terms, it is possible to verify that in all sectors, with the exception of cultural activities, the prevailing legal form is the Individual Firm.

In the province of Campobasso, there were 1,938 enterprises active in the tourism sector in 2018. The following table highlights the numbers of enterprises broken down by ATECO code and legal form:

Campobasso	Società di capitali	Società di persone	Imprese Individuali	Altre Forme
Sez. I Div. 55 Alloggio	40	25	80	2
Sez. I Div. 56 Servizi di ristorazione	230	307	979	15
Sez. N Div. 79 attività dei servizi delle agenzie di viaggio, dei tour operator e servizi di prenotazione e attività connesse	11	12	15	5
Sez. R Div. 90 attività creative, artistiche e di intrattenimento	12	3	26	12
Sez. R Div. 91 attività di biblioteche, archivi, musei ed altre attività culturali	1	0	0	3
Sez. R Div. 93 attività sportive, di intrattenimento e di divertimento	55	28	60	17
TOTALE	349	375	1160	54

Fonte: Infocamere (2018)

In the province of Campobasso, it is possible to note that in the case of Accommodation services, the enterprises, on a percentage level, are made up as follows: 54.42% Individual Firms, 27.21% Joint Stock Companies, 17.01% Partnerships, 1.36% Other Legal Forms. On the other hand, for catering services, the percentages are made up as follows: 63.95% Individual Firms, 20.05% Partnerships, 15.02% Corporations, 0.98% Other Legal Forms. For services carried out by Travel Agencies and Tour Operators, the percentages are broken down as follows: 34.88% Individual Firms, 27.91% Partnerships 203, 25.58% Joint Stock Companies, 11.63% Other Legal Forms. For services related to creative, artistic and entertainment activities, the percentages break down as follows: 49.06% Individual Firms, 22.64% Joint Stock Companies, 22.64% Other Legal Forms, 5.66% Partnerships. For services pertaining to the activities of libraries, archives, museums, and other cultural activities, the percentages are divided into 75% Other Legal Forms and 25% Joint Stock Companies. For services pertaining to entertainment and amusement activities, the percentages are divided into 37.50% Sole Proprietorships, 34.38% Corporations, 17.50% Partnerships, and 10.63% Other Legal Forms. In the province of Campobasso, it can be seen that the prevailing legal form, with the exception of services provided by libraries, archives and museums, is the Individual Firm.

In the province of Isernia, there were 753 active enterprises in the tourism sector in 2018. The following table highlights the numbers of enterprises broken down by ATECO code and legal form:

Isernia	Società di capitali	Società di persone	Imprese Individuali	Altre Forme
Sez. I Div. 55 Alloggio	15	11	31	1
Sez. I Div. 56 Servizi di ristorazione	95	127	364	8
Sez. N Div. 79 attività dei servizi delle agenzie di viaggio, dei tour operator e servizi di prenotazione e attività connesse	5	2	6	1
Sez. R Div. 90 attività creative, artistiche e di intrattenimento	5	0	10	1
Sez. R Div. 91 attività di biblioteche, archivi, musei ed altre attività culturali	0	1	1	0
Sez. R Div. 93 attività sportive, di intrattenimento e di divertimento	24	13	25	7
TOTALE	144	154	437	18

Fonte: Infocamere (2018)

In the province of Isernia, it is possible to note that as far as Accommodation services are concerned, businesses, on a percentage level, are made up as follows: 53.45% Individual Firms, 25.86% Joint Stock Companies, 18.97% Partnerships, 1.72% Other Legal Forms 204. On the other hand, for catering services, the percentages are distributed as follows: 61.28% Individual Firms, 21.38% Partnerships, 15.99% Corporations, 1.35% Other Legal Forms. For services carried out by Travel Agencies and Tour Operators, the percentages are distributed as follows 42.86% Individual Firms, 35.71% Joint Stock Companies, 14.29% Partnerships, 7.14% Other Legal Forms. For services related to artistic, creative and entertainment activities, the percentages break down as follows 62.50 percent Individual Firms, 31.25 percent Joint Stock Companies, and 6.25 percent Other Legal Forms. For services related to activities carried out by libraries, archives, museums and other cultural activities, the percentages are divided into 50% Partnerships and 50% Sole Proprietorships. For services related to entertainment and amusement activities, the percentages are divided into 36.23% Sole Proprietorships, 34.78% Corporations, 18.84% Partnerships, and 10.14% Other Legal Forms. In the province of Isernia it is possible to note that the prevailing legal form, with the exception of services provided by libraries, archives and museums, is the Individual Firm.

3.4 Touristic Offers

The path of analysis of receptivity in Molise mirrors that conducted for Italy. The following table shows the number of accommodation establishments in Molise in 2017 and a correspondence between the types of establishments (hotel and non-hotel) and the Ateco 2007 classification. In particular, as already highlighted, to the Ateco classification "hotels and similar facilities" (55.1) correspond hotel establishments and tourist hotel residences; to the Ateco classification "vacation and other short-stay accommodations" (55.2), "camping areas and the areas equipped for campers and caravans" (55.3) fall under: non-hotel establishments, campsites and tourist villages, entrepreneurially managed rental accommodation, agritourisms, youth hostels, vacation homes, mountain lodges, other accommodation establishments n.o.c. and bed and breakfasts. The sum of the categories corresponds to the total number of accommodation establishments.

Ateco 2007	Tipologia di esercizio	Numero di esercizi	Posti letto	Camere	Bagni
Alberghi e strutture simili	Esercizi alberghieri	103	5.902	3.023	2.888
	Alberghi di 5 stelle e 5 stelle lusso	1	38	19	19
	Alberghi di 4 stelle	22	2.016	1.041	1.041
	Alberghi di 3 stelle	41	2.237	1.181	1.174
	Alberghi di 2 stelle	22	580	321	312
	Alberghi di 1 stella	7	125	67	62
Alloggi per vacanze e altre strutture per brevi soggiorni, aree di campeggio e aree attrezzate per camper e roulotte	Residenze alberghiere turistico	10	906	394	280
	Esercizi alberghieri extra-	405	5.964	..	..
	Campeggi e villaggi turistici	16	2.407	..	..
	Alloggi in affitto gestiti in forma imprenditoriale	104	803	..	..
	Agriturismi	83	1.074	..	..
	Ostelli per la gioventù	1	50	..	..
	Case per ferie	26	786	..	..
	Rifugi in montagna	1	48	..	..
	Altri esercizi ricettivi n.a.c.	..	..	..	..
	Bed and breakfast	174	796	..	..
Totale esercizi ricettivi		508	11.866	3.023	2.888

...il fenomeno non esiste oppure esiste e viene rilevato, ma i casi non si sono verificati
Fonte: Istat (2018)

According to Istat, there are 508 accommodation establishments in Molise in 2017, including 103 hotel establishments and 405 non-hotel establishments. A total of 11,866 beds are provided (5,902 of hotel establishments and 5,964 of extra-hotel establishments). In line with the national situation, The Molise accommodation structure is characterized by a prevalence of extra-hotel facilities which, however, in terms of beds slightly exceed hotel facilities. The hotel structure has, in fact, on average more rooms than the extra-hotel structure.

Looking at the data provided by Istat on the capacity of accommodation establishments (2017), there is a number of hotel accommodations responding to the Ateco classification "hotels and similar establishments" (55.1) amounting, in total, to 103 establishments with 5,902 beds. These data were compared with the business registry database and, subsequently, with research conducted directly by Sviluppo Italia Molise. Specifically, starting from the business registry's database of all registered activities, the activities falling under this classification were extrapolated, based on the Ateco classification "hotels and similar establishments" (55.1), the total number of which is 93. From an in-depth analysis of the description of the main activity, attention is drawn to the fact that, some of them, state how the main activity can be traced back to "the reception of migrants."

Such activities, therefore, certainly cannot be included for the purpose of identifying tourist accommodation facilities. Starting from this issue, also taking advantage of the documents available on the websites of the two Prefectures of Campobasso and Isernia and through the official data of Infocamere, an attempt was made to identify all those facilities operating in this area, so as to have a "net" view of the accommodation facilities used exclusively for tourism purposes. Similarly, a search was conducted in 2019 directly by Sviluppo Italia Molise, which, through the web (booking sites, yellow pages) and telephone contacts, identified a number of accommodation activities equal to 120 units. Adopting the same criterion as above, accommodation activities were identified that have implemented a conversion to a migrant reception center and, therefore, cannot be considered usable, at least at the moment, for tourism purposes.

3.5 Challenges and opportunity

Poor utilization of regional resources is a common trait of all regions in the South, as Bank of Italy data show. In this picture, Molise's data are particularly negative, and regional destinations have a medium to low level of maturity on the demand side - Molise is often last in terms of tourist flows in Italy - and on the supply side - the region has significant growth potential both in terms of geography (e.g., kilometers of coastline and trails to be enhanced) and services offered. This concerns first and foremost the tourist destinations par excellence, sea and mountains, but also other top national - and regional - resources, such as culture and food and wine. This criticality, as the Bank of Italy points out about the Mezzogiorno, is an opportunity where "spaces emerge to be exploited in order to take full advantage of the sector's potential, [...] where tourism activities still appear relatively undersized and where, given the area's lag in development, the benefits in terms of impact on product and employment could be greater."

Moreover, in a phase of profound transformation of tourism demand and, more generally, of the competitive assets of the Italian regions, Molise's lag opens up prospects of great interest insofar as unconsolidated supply chains are able, if appropriately promoted, with greater elasticity and lower cost of reconversion, to accommodate new tools and new directions of development with a strong content of technological innovation. A third factor to consider is the possibility, for a region at a still immature stage of its tourism development, to build a sustainable growth model that avoids the negative externalities that many mature destinations are experiencing, primarily rising cost of living for residents, rising real estate values of homes and overcrowding. Last but not least fact to consider: Molise has good feedback in the evaluation of the visitor experience. For example, the Bank of Italy, in its monitoring of the degree of satisfaction expressed by foreign tourists toward cultural destinations¹²⁶ over the period 2007-2015, estimates significant growth for the region and a very positive ranking, in fourth place after Umbria, Friuli and Marche.

It can therefore be assumed that, once the major critical issue for the region, i.e., accessibility (as a mix of promotion, transportation and reception system), is overcome, the visitor experience contains many competitive elements. Having defined a strategy for overcoming access problems, the central theme then appears to be to enhance Molise's resources, which, as extensively described above, are significant and perfectly in line with changes in tourism demand. "Valorization" is therefore a strategic process for the purposes of building the "product-promotion," strengthening the visit experience in terms of quality and prolongation of the stay, and building the loyalty of the tourist functional to return and transforming him into a promoter of the territory in his countries of origin. Closely related to the theme of enhancement is that of innovation. As already pointed out, innovation is the fundamental strategic axis both for building products that intercept tourist flows that look to ever-new and tailored, adaptable and modifiable offerings in transformation, and for identifying new languages and promotional tools, more diffuse and capable of intercepting differentiated audiences, and, finally, for making tourism strategies an opportunity to relaunch the territory with a view to sustainable development and intelligent specialization.

The first step in this process is to transform key resources into innovative products, increasing their capacity and value. The top destinations, seaside and mountain, can be represented at a stage of semi-maturity, that is, not yet fully "saturated" either on the supply or demand side, and with a degree of recognition at their target markets yet to be strengthened. Beach tourism is directed mainly to Termoli and Campomarino, followed, in terms of attendance, by Montenero di Bisaccia and Petacciato. As anticipated, this type of destination intercepts growing flows both nationally and, especially, in the southern regions (+6 percent).

These are likely to benefit from a growth in attractiveness of destinations with a medium to low level of urbanization.

For Molise, however, the competitiveness of the coasts of neighboring regions, particularly Abruzzo and Puglia, appears to be significant. However, it is possible to envisage, with appropriate verification in the data, spaces for strengthening domestic tourism, on the one hand, and for offering niche services and strong identity for national and international tourism, on the other. The theme, moreover, as will be better discussed below, is to integrate the beach product within composite packages. The possible evolutionary axes, deduced from the international economic framework outlined above, but to be verified once a regional information system capable of returning an adequate X-ray of flows is activated, also in relation to similar destinations in other regions, are:

- Expansion on the coast of targeted offerings to specific targets, e.g., nature tourism demand;
- Increase/enhancement of additional services, e.g., fishing, water sports ;
- Increase/enhancement of related supply chains, e.g., food and wine;
- Creation of composite sea/culture/mountain packages.

Within this reasoning, the current and potential weight of "ancient villages" is relevant in Molise. The villages represent a cultural heritage for the development of tourism related to historical, cultural and identity heritage. Village tourism involves destinations that are not always well-known but have a recognizable identity character that offer themselves as ideal destinations for slow and sustainability-conscious forms of tourism. Four villages in Molise have the orange flag¹³⁵, a tourist-environmental quality mark awarded by the Italian Touring Club to small inland Italian municipalities (maximum 15,000 inhabitants) that stand out for an offer of excellence and a quality welcome. However, the regional Borghi system, understood as a product, is not yet defined and lacks adequate promotion and marketing. Tourists arriving in Molise today consider the village as an additional product to other destinations in the area. An integral part of cultural tourism is also the identity heritage constituted by the whole system of local traditions, primarily transhumance, but also festivals, folklore, religious ceremonies¹³⁶ etc., which, for a considerable share of tourist demand, is a destination of strong interest.

The experience of connecting with the territory, its roots, its customs, especially if they are strongly expressive, is an important value for international tourist flows, especially those countries of origin that feel the lack of historical roots or with strong urban and industrial development. Again, however, these are resources that need to be enhanced, i.e., networked, organized, promoted, and functionalized to composite tour routes or packages.

4. Developing the strategy

4.1 Vision For tourism in Molise

The analysis conducted revealed the traits of a region that struggles to enhance and affirm its strengths. Molise's extremely rich but also very fragmented heritage-mountains, hills, sea, culture, traditions, agricultural products, food and wine, sheep-tracks-do not emerge from the overly broad mesh of the international tourism narrative-and even national information-because, over the years, the region has struggled to speak with one voice, to "systemize" by recognizing borders as an opportunity for development and promotion of the territory. This Regional Strategic Plan for Tourism Development has brought to light a highly articulated and composite dataset that reconstructs an X-ray of Molise in relation to the tourism industry, highlighting its strengths and weaknesses, competitiveness, development potential and growth

prospects, but the main result, shared by the path of participation activated by the Plan, is precisely the obvious urgency to start again from a process of territorial cohesion, of identity activation of operators, citizenship and institutions to rebuild the perimeter and ties, connections, a tightly knit network with well-defined and recognizable features.

Therefore, the key to Molise's tourism plan turns out to be precisely the transformation of the "fragmentation" of resources from a point of weakness to a factor of success, the identification of actions that can connect places, people, activities, and build around the widespread heritage a framework of meaning, trust, narrative, promotion and infrastructure. Once this network is built, this complex and integrated system, solid but adaptive, the region can look to its future, adopting tools and products that can intercept new tourist flows but generate employment by interrupting the depletion of inland areas and promoting sustainable and innovative growth.

Of course, an essential condition of this vision, as, moreover, of all reasoning on integrated local systems, is a process of building skills and promoting a new generation of local operators, businesses, and the third sector: a new generation by age or by innovative "leap," with which to build the prerequisites for change. The Molise Region, already in the definition of its Intelligent Specialization Strategy (RIS3 Molise), has defined cultural tourism and creative industries as one of the main areas of reference for the development of its territory. In this context, in fact, reference was made to the importance of focusing attention, in measuring the degree of regional wealth, on additional parameters to those used in official economic statistics: availability of environmental, food, historical and landscape wealth. Such elements represent the substrate for raising the level of quality of life of residents, of attracting potential tourists and, thus, as a multiplier effect, improving economic performance indices. It is no coincidence that the vision expressed by the 2016 RIS3 Molise summarized its development horizon with the adjective green.

In line with this scenario and building on the participatory journey undertaken, as well as the overall analyses carried out, it is possible to make explicit the specific vision for Molise's tourism sector.

According to this vision and the path of analysis, which is the result of a process also participated in by the region's stakeholders, a strategic framework has been identified against which the regional governance intends to orient its action in the coming years. This is an articulated path, but one that will allow for action on the elements that affect the region's current tourism conditions. Consider, for example, the high rate of concentration (with strong seasonality) on the coast of presences, the good performance of some municipalities in upper Molise, the underutilization of many accommodation facilities¹⁷⁴, the fragmented nature of the local regulatory framework, and the gaps in image, infrastructure and support services.

4.2 SWOT

L'analisi SWOT (verifica dei punti di forza, debolezza, minacce e opportunità) della destinazione Molise consente di sintetizzare le analisi precedentemente proposte e combinarle insieme in modo da disporre di un quadro complessivo degli elementi fondamentali che è necessario indagare ai fini dello sviluppo turistico. In particolare, la sintesi proposta è fondata sugli approfondimenti relativi ai seguenti macro-temi: analisi del contesto turistico nazionale ed internazionale; offerta di turismo; legislazione turistica; percorso partecipativo degli Stati Generali del Turismo e della Cultura; opinione dei fruitori.

Strength	Weakness
<p>Intact natural and environmental heritage (3.7.1); - Irrelevance of crime phenomena (3.1.2); - Relevant and widespread cultural heritage (3.7.1); - Genuineness of hospitality (2.3.3); - Solid prerequisites for transforming the propensity to hospitality into a distinctive characteristic (2.3.3); - Availability of real estate assets (2. 3.3, 3.7.1) in disuse; - Quality of eno-gastronomic products (2.3.3, 3.7.1, 3.7.2); - Artisan vocation (3.4.1); - Ease of reading economic and social phenomena (2.3, 3.5.1); - Good responsiveness of the economic and social fabric with respect to participatory stimuli (2.3); - Capillarity of the local association network (3.4.1).</p>	<p>- Low consistency of tourism flows and high seasonality (3.5.1); - Weak image (2.3.2, 3.1.2, 3.5.1); - Age-class composition of the population (3.1.1); - Poor product differentiation (3.7.2); - Low propensity for entrepreneurship and innovation (2.3.2, 3.4.1); - Low culture of collaboration of regional operators and adherence to external networks (2. 3.2, 2.3.5); - Lack of coordination of intraregional transportation services (2.3.2, 3.2.5); - Lack of coordination of communication policies (2.3.2) ; - Lack of awareness of their identity nature by operators and residents (2.3.2); - Low level of usability of tourism resources (2.3.2, 3.7. 1); - Insufficient quantity and quality of professional services to support the tourism supply chain (2.3.2, 3.7.1); - Weak and non-integrated basic reception services (2.3.2); - High water dispersion and low quality of service delivery in some municipalities (3.1.1); - Insufficient level of accommodation facilities in terms of quality and professionalism of services provided (2. 3.2, 3.4.1); - Poor level of maintenance of road infrastructure (3.2); - Deficiencies in social and health services (3.1.2); - Poor provision of transport infrastructure other than roads (3.2); - Digital divide (3.2.7); - Fragmented collection and management of tourism data (2.3.2, 3.6.2); - Incomplete and non-organic regulatory framework (3, 3.3).</p>
<p>Threat</p>	<p>Opportunity</p>
<p>- Progressiveness of population decline (3.1.1); - Strong competition from neighboring tourism regions (3.6); - High emigration rate of young and skilled human resources (2.3); - Exogenous decline in tourism demand (1.1); - Earthquake events (3.1.1).</p>	<p>- New demand segments in the growth phase (1.1, 2.1.2, 3.7); - Proximity to potential tourism catchment areas (metropolitan areas of the South-Central) (3.5, 3.2); - Possible access to financial resources capable of supporting the implementation of the "Molise Method" (3.9, 3.7.3); - Network of Moliseans abroad (2. 4); - Presence of tourism areas with high perceived development potential (2.3.5); - Expansion of regional operators' culture of collaboration and membership in external networks (2.3.2, 2.3.5); - Existence of conditions to intercept new demand segments (sustainable, accessible, experiential, fandom tourism, etc.) (1.1.2, 2.1.2, 3.7.2).</p>

4.3 ACTION PLAN

Action Plan for Developing Tourism in Molise:

1. Destination Branding and Marketing:

Develop a unique and compelling brand identity that showcases Molise's natural beauty, cultural heritage, and authentic experiences.

Create an integrated marketing strategy, including a user-friendly website, social media presence, and targeted advertising campaigns to reach potential tourists.

Collaborate with travel agencies and influencers to raise awareness and generate interest in Molise as a desirable destination.

2. Infrastructure and Accessibility:

Improve transportation infrastructure, focusing on road networks and public transportation to enhance accessibility to Molise.

Upgrade and expand accommodation options, from luxury hotels to eco-friendly lodges and rural bed and breakfasts, to cater to diverse traveler preferences.

Establish visitor information centers at key entry points to provide guidance and promote local attractions.

3. Sustainable Tourism Practices:

Promote sustainable tourism by implementing eco-friendly practices, reducing waste, and conserving energy in both accommodations and attractions.

Encourage local businesses to adopt sustainable initiatives, including eco-certifications and responsible sourcing.

Engage the community in eco-conscious practices and educate visitors on responsible tourism to protect the region's natural environment.

1. Montenegro

1.1. Nature and landscape

Montenegro, country located in the west-central Balkans at the southern end of the Dinaric Alps. It is bounded by the Adriatic Sea and Croatia (southwest), Bosnia and Herzegovina (northwest), Serbia (northeast), Kosovo (east), and Albania (southeast).

It covers total area of 13,812 km² and has a population of 627,082. The coast of Montenegro is 294 km (183 mi) long. Montenegro is divided into twenty-four municipalities. Montenegro's administrative capital is Podgorica, though its cultural center and historical capital is Old Royal Capital Cetinje.

It is a country of breathtaking beauty and rich history that was proclaimed ecological state in 1991. When the Declaration on the ecological state of Montenegro was adopted by the Parliament of the Republic of Montenegro.

Terrain in Montenegro ranges from high mountains in the northern part of the country, through karst segment in central and western part, to almost 300 km of a narrow coastal plain. The mountains of Montenegro include some of the most rugged terrains in Europe, averaging more than 2,000 metres (6,600 feet) in elevation.

Montenegro has five national parks, 5 Canyons and 40 Lakes. The deepest canyon in Europe – Tara River canyon, the largest lake in Southern Europe – Skadar lake, one of the last preserved rainforests in Europe – Biogradska gora, and the most southern fjord in Europe – Boka Bay.

It has 4 World Heritage Sites on UNESCO list - Durmitor National Park, Natural and Culturo-Historical Region of Kotor, Stećci Medieval Tombstone Graveyards and Venetian Works of Defence between the 16th and 17th Centuries: *Stato da Terra – Western Stato da Mar, but also one intangible heritage* - Cultural Heritage of Boka Navy Kotor: a festive representation of a memory and cultural identity.

1.2. History and culture

Montenegro, it is a meeting point of East and West, Christianity and Islam, Roman Catholic and Orthodox Churches.

During the Early Medieval period, three principalities were located on the territory of modern-day Montenegro: Duklja, roughly corresponding to the southern half, Travunia, the west, and Rascia proper, the north. The Principality of Zeta emerged in the 14th and 15th centuries. From the late 14th century to the late 18th century, large parts of southern Montenegro were ruled by the Venetian Republic and incorporated into Venetian Albania.

The name *Montenegro* was first used to refer to the country in the late 15th century. After falling under Ottoman Empire rule, Montenegro gained its semi-autonomy in 1696 under the rule of the House of Petrovic-Njegos first as a theocracy and later as a secular principality. Montenegro's independence was recognized by the Congress of Berlin in 1878. In 1910, the country became a kingdom, under Petrovic family.

After World War I, it became part of Yugoslavia. Following the breakup of Yugoslavia, the republics of Serbia and Montenegro together proclaimed a federation. Following an independence referendum held in 21st May 2006, Montenegro declared its independence in June 2006.

Montenegro's culture has been influenced by the Serbian Empire, the Byzantine Empire, Ancient Greece, Ancient Rome, Christianity, the Ottoman Empire, the Republic of Venice, Austria-Hungary, and Yugoslavia.

According to the Constitution, adopted in October 2007, the official language is Montenegrin, but Serbian, Bosnian, Albanian and Croatian also have official status. Montenegro is a democratic, social and ecological state, according to the Constitution.

The traditional folk dance is a circle dance called kolo, which is common in the region. It is a collective dance, called Oro (or the "Eagle dance") in Montenegro. Montenegrins' long-standing history of struggle for freedom and independence is invariably linked with strong traditions of oral epic poetry.

1.3. Economy

Since 1st January 2002, official currency in Montenegro is euro.

Montenegro is a member of the United Nations, NATO, the World Trade Organization, the Organization for Security and Co-operation in Europe, the Council of Europe, and the Central European Free Trade Agreement. Montenegro is also a founding member of the Union for the Mediterranean, and is in the process of joining the European Union as of 2016.

Following the independence referendum, Montenegro's economy has evolved to highlight its service sector, with a goal of becoming an elite tourist destination, and is navigating the process of joining the European Union. Attempts to attract foreign investors for large infrastructure projects are ongoing, as these projects are integral to its development as a tourist destination.

Montenegro experienced a real estate boom in 2006 and 2007, with wealthy Russians, Britons and others buying property on the Montenegrin coast. However, the Great Recession did slow economic growth.

The banking sector of Montenegro has a significant share of foreign capital. Banks in Montenegro provide both retail and corporate banking products under one roof, and most offer non-resident accounts, usually to both natural persons and legal entities.

2. Tourism in Montenegro

Tourism is a strategic economic branch of the Montenegrin economy. Until 2020, which is characterized by the outbreak of the COVID-19 pandemic, the tourism sector had recorded an increase in the number of tourists and overnight stays, investments, and final revenues, every year.

A leading role in defining development policies in tourism, destination management and creating a tourism product have the Ministry for Economic Development and Tourism, the National Tourism Organisation of Montenegro and local tourism organization. To improve the business and investment environment and create a new destination management model, Montenegro is looking at possibilities to restructure tourism and economic bodies by introducing a destination management model. The synergy of the National Tourism Organisation with local tourism organizations and other tourism actors is necessary through strengthening public-private partnerships, which should be the backbone of the future functioning of the Montenegrin tourism.

According to the official data of the Administration for Statistics - MONSTAT, in the first four months of 2023, 248,346 tourists visited Montenegro in collective accommodation, i.e. 59.12% more compared to the same period last year, and 14.52% more compared to the same period. the record-breaking period of 2019. 639,288 overnight stays were achieved, which is 49.48% more compared to the same period last year, and 41.29% more compared to the same period in 2019. In the structure of overnight stays by foreign tourists, the most overnight stays were achieved by tourists from Serbia (13.18%), Germany (10.68%), France (6.52%), United Kingdom (6.16%), Russian Federation (5.78%).

According to the report of the Central Bank of Montenegro for the first quarter of 2023, income from foreign guests amounted to EUR 118,920,000, which is 162% more than in the same period of 2022.

The key indicators from the report¹ of the World Travel and Tourism Council (WTTC) for Montenegro, which refer to 2019, are the following: total (direct and indirect) contribution of the tourism and travel sector to gross domestic product (GDP) was 30.9%, the total contribution to employment was 31.9%, and the share of tourism in total exports was 52.6%. If we look at the data for the period from 2009 to 2019, it can be stated that the number of tourists increased by 119%, the number of overnight stays by 91%, and the total revenue by 92%. Statistics also show that over 90% of tourist visits are in the coastal region and mainly during the short summer period (June-September).

2.1. Challenges and Opportunities for tourism in Montenegro (SWOT)

A number of problems and challenges associated with tourism development have been identified over the years. They remain to be addressed further, while this strategic document seeks to find systematic responses to address them.

Tourism in Montenegro faces mainly problems such as limited tourist infrastructure, low diversification of products, peak season of few months, etc.

Although there is a demand for services for a long period of the year, supply is lacking as sporadic development to date has given tourism a highly seasonal character.

Below is given short SWOT analysis of tourism in Montenegro:

STRENGTHS

- Traditional hospitality of local population preserved on the rural areas (mountains)
- Historic and archeological cities with great cultural, religious, architectural heritage;
- Diversified tourism offers (sea, cultural, natural);
- Favorable climate characteristics for summer and winter
- Well-known brands present on the market (Hilton, Regent)
- National Tourism Organization as main promotor of all tourism

¹ World Travel & Tourism Council, 2021 Annual Research: Key Highlights

WEAKNESSES

- Tourism Seasonality;
- Poor Environmental control;
- Limited Ecotourism offer;
- Limited cultural tourism products;
- Limited use of digital technologies

OPPORTUNITIES

- Using the quality products and services, and local uniqueness;
- Integrating the natural and cultural heritage with the newly form of doing tourism (cycling, adventure tourism on mountain, river and sea);
- Improvement of new mobility infrastructure (airports, railways, ports, intermodal local centers);
- New thematic routes and mostly the intraregional routes under the Council of Europe CulturalRoutes program;
- Development of ICT for tourists and local operators;
- The diversification of tourist offers;

THREATS

- Threats from the unfriendly practices to the environment;
- Overpricing of real-estate;
- Poor coordination between stakeholders;
- Loss of cultural identity;
- Competition with other EU and non-EU countries;

3. Participatory mapping – POI's

National Tourism Organisation of Montenegro had contracted an expert in charge of defining a list of most interesting cultural and natural heritage locations around Montenegro, which visibility should be improved to the wider community and the most important, to tourists visiting Montenegro.

As a basis an expert also used information about cultural and natural heritage, having special status according to the Montenegrin laws, such as protected heritage. When it's about cultural heritage, for that part was used list of heritage that is prepared by the Ministry of Culture of Montenegro and was an Annex to the Program of Cultural Tourism Development of Montenegro with the Action plan 2019-2021. For the natural heritage, as a basis were used available information on the national and local level, and source were Ministry in charge of Ecology and Nature and Environment Protection Agency of Montenegro.

An expert prepared a list of 266 locations, in a communication and with suggestions of the Ministry of Economic Development and Tourism, National Tourism Organisation, but also local tourist organizations. For all the locations was prepared text in English and Montenegrin.

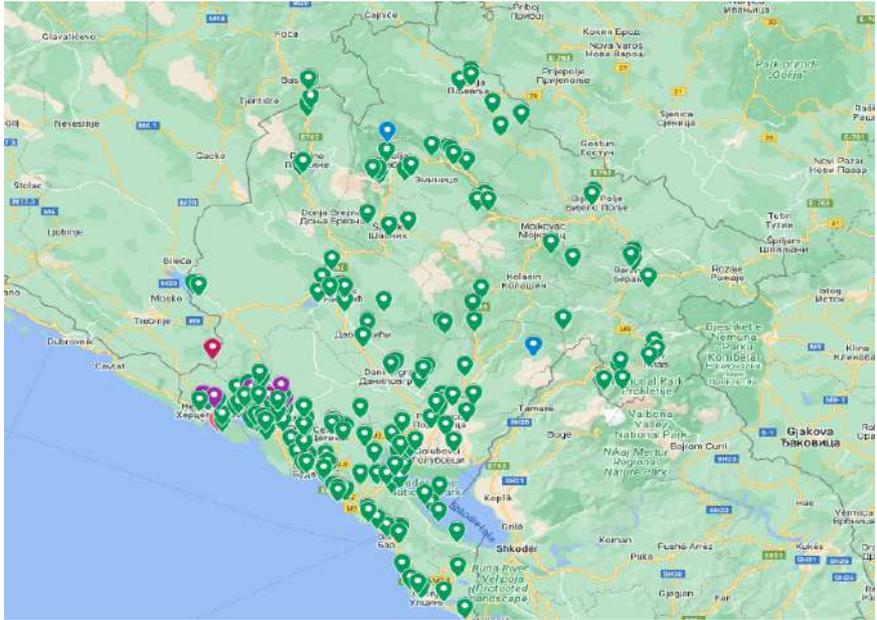
Later, based on the prepared list was conducted data gathering for mapping most important cultural and natural heritage around the Montenegro.

We have identified 6 main types under which all POI's could be divided, and that are of strategic importance for tourism:

- Nature
- History and tradition
- Religious sites
- Culture and arts
- Sport and recreation sites
- UNESCO sites

Based on these 6 categories, an initial document was prepared that identified all POI's and their respective locations, each covered by more 360 photos. Selected 266 POI were divided geographically based on the 3 country regions - Northern, Central and Southern region.

The following is an illustration of the distribution of the identified cultural and natural sites within the country.



Each region was logically divided between municipalities and for each municipality a detailed list of locations was created. In total 21 municipalities were covered (out of 23 in total), thus providing coverage of most of the country.

Each municipality contains multiple POI. Each POI contains one or more 360 photo and 2D photo. Based on this administrative grouping, it was decided to produce one video for each municipality as a compilation of POI's for that municipality. Videos were captured exclusively using a drone, which resulted in more impressive shots than it would be by filming from the ground level.

Each POI was marked as a different chapter allowing the possibility to jump directly to that timestamp of the video. This approach resulted in each municipality receiving its own promotional video, that can be used on social networks and broadcast services. Average duration of each municipality video is between 1 and 7 minutes, depending on the number of locations mapped per municipality.

3.1. Data gathered per region

REGION	MUNICIPALITIES	POI
--------	----------------	-----

Northern region	10	143
Central region	5	30
Southern region	6	93
TOTAL	21	266

In total, 266 POI's were covered by:

- **1126** equirectangular (360 VR) photographs
- **893** classic (2D) pictures
- **21** videos totaling 67:39 minutes in duration

Out of 1126 equirectangular photographs there has been:

- **729** photographs (360 equirectangular panorama) taken on the ground level, using a tripod
- **369** photographs (360 equirectangular panorama) taken from air, using an UA

At the end, on the platform of the DUE MARI project were uploaded 166 out of the 266 locations, since it was a limit on the platform.

3.2. Existing tourists' offers and infrastructure upon the POI-s

266 POI's were mapped in a different area of Montenegro. Infrastructure to access some of them, as roads etc., is in a very good condition, but in some cases, it has to be improved and upgraded.

Very important aspect from tourists' point of view, in terms of infrastructure, is existence of accommodation capacities, but also restaurants, cafes and similar offer, close to the POI's. Since some locations are in the mountains and less accessible areas, logically this kind of infrastructure is limited, but still there is a great offer of rural households, as a very significant part of Montenegrin tourist offer.

The Strategy of Tourism Development in Montenegro 2022-25 is aligned with tourism development trends and new circumstances after the pandemic. All the activities and projects are focused on sustainable, inclusive, smart, green and responsible tourism, with the ultimate goal of establishing Montenegro as a globally recognizable tourism destination by 2025.

The road map for achieving the strategic goal is based on managing destinations in a sustainable way, creating an innovative, green and inclusive tourism product, influencing the increase in tourism spending, reducing seasonality and regional imbalances, raising the living standards of local populations and increasing tourist satisfaction.

Several key operational goals have been defined in relation to the Strategy, which includes also some that are relevant for the project, such as: supporting the development of tourism infrastructure; expanding the quality and quantity of accommodation capacities; diversifying the tourism product while retaining quality; enhanced human resources, knowledge and skills in tourism; developing digital, innovative solutions and new technologies in tourism.

The development of tourism in the new circumstances is based on the potential of green, smart and inclusive tourism from the aspects of:

Improving the quality of accommodation facilities: developing “green” types of accommodation facilities that meet eco-standards.

Upskilling of business: intensifying the application of new technologies and digitisation in tourism businesses.

Raising the quality of the tourism offer: developing special types of tourist products and activities based on nature and providing a unique experience and healthy lifestyles.

Regarding a green tourism economy, Montenegro is working with the private sector and other stakeholders to assure the commitment to environmentally sensitive tourism development. This is being worked on through areas including carbon-neutral buildings, environmentally appropriate tourism development projects, nature preservation, and building citizen awareness and commitment.

Digitalization and innovation in tourism are focused on supporting tourism service providers, encouraging the development and promotion of tourism in a sustainable, green, smart and inclusive way, encouraging tourist experiences, quality tourism content with a focus on cultural heritage, and the authenticity of the destination. The Smart Specialization Strategy 2019-24 and the Health

Tourism Development Programme 2021-23 recognize and promote the importance of medical tourism, which has increased due to the COVID-19 pandemic.

Currently, 95% of tourism overnight stays and income are achieved in the coastal area, and 75% occurs in the summer months, that should be more balanced.

4. Promotional activities on the project relevant for POI's

As an inseparable part of the project communication activities Channels such as profiles on social networks (Instagram, Facebook, LinkedIn), YouTube account and the program page <https://www.italy-albania-montenegro.eu/due-mari>, are used for the promotion of the project activities so far.

According to the data available on 21st July 2023, we have registered the following numbers social media accounts of the Due Mari project:

Social Media	Number of followers
Facebook	525
Twitter	151
LinkedIn	1882
Instagram	1563
YouTube	19
TOTAL	4140

Since our targeted number of followers is higher, we are in process of improving activities, and NTO of Montenegro announced a public call for an expert that will put an effort in improving visibility of the project outputs, mainly of the platform, but also others.

In order to promote activities of the project, except projects designed channels, we also used official channels of the Ministry in charge of tourism, to promote the project on the national level, through announcements on the website of the Ministry but also Instagram account.

In terms of the further activities, for September 2023 are planned 3 workshops in Montenegro where the results of the project together with importance and benefits of the digitalization and improving visibility will be presented to the representatives of the local tourism organizations, tourism industry (tour-operators, hotels, tour guides and other) and the general public, in order to involve the wider community in this topic.

The final event, project conference, involving all the partners on the project, will be organized in Montenegro in October, to cover all the project results. It is planned to invite stakeholders from all three countries, areas covered by the project, in order to present final results and conclude a project.

4.1. Further activities

According to the Montenegro Tourism Development Strategy 2022-2025 with the Action Plan, the Government of Montenegro opted for continuous sustainable development of tourism, focusing on efficient use of resources, promoting Montenegro as sustainable, inclusive, green and smart tourist destinations.

Entities in Montenegro are working on digitalization in tourism, in order to apply smart technologies to improve the visibility of the destination, creating virtual reality content, promoting the destination in digital format, etc.

In order to examine opinion of the stakeholders in tourism sector in Montenegro, related smart technologies and its effects on tourism, but also including its needs today, we will conduct a short survey that will be shared online.

A survey will include questions regarding the DUE MARI project outputs, mainly joint platform and how do they see it as a contributor to the improvement of the visibility of the destination and potentially its businesses.

Based on it we will give conclusions that could be possibly used in other projects, related to the use of smart technologies in the future. That possible could be continuation and upgrade of the Due Mari platform.

1. Albania

1.1 Geographical location of Points of Interests

1.2 Nature and landscape

Albania is estimated as a country privileged by nature. This small country is characterized by a richness of natural diversity, which is expressed in all elements of the natural environment, such as landforms, climate, hydrography, animal and vegetable life. The Relief presents sharp contrasts, which create a particular charm to the eye of tourists. Albania has a coastline of 450 km on the Adriatic Sea and Ionian Sea with a important number of beaches. We go from the bank of the sea immediately in the high mountains. In the hinterland the territory boasts a very rich flora, with a large number of beeches, oaks and rare Macedonian pines in the lowlands. The sides of the mountains up to 2000 m are covered with birches, pines and firs, while at higher altitudes a bare and desolate landscape takes over. It is estimated that forests occupy 36% of the country, with a greater concentration in the northern highlands and near the Greek border. These isolated forests are populated by bears, deer and wild boar. Only about 100 km from the sea is situated the highest mountain in the country, Korab, 2751 m. About 80% of the land area is located on a height of 200 m to the sea level.

Throughout the country are operational 15 natural national parks, which create an opportunity for the sustainable tourism development. The protected areas in our country are part of land and water reserves protected due the biological diversity, the natural and cultural richness they offer. They are divided into six categories according to their importance: 4 strictly protected areas, 11 national parks, 300 natural monuments, 26 administered sites, 4 terrestrial or marine protected areas and 4 resources protected areas.

Geographically and physically, Albania has four main areas: the mountainous region of North (Albanian Alps), the mountainous region of the center, the mountainous region of the South (with the beautiful "Albanian Riviera"), the Plain of South-West, which present a great potential for the tourism.

1.3 Culture, economy and demography

Albania rich of and diversity of heritage, which includes cultural exchanges with the Greeks, Romans, Byzantine, Venetian, and Ottoman Empires, and many others, can offer a mix of archaeological sites situated in the coastal area and also on different other regions. Some old cities part of UNESCO international heritage, are well preserved and developed to offer their values to the visitors and nationals, together with traditional clothing, dances and folk songs. On the south-west coast is very popular and preserved the iso-poliphony style of Albanian folk singing, which has been stated by UNESCO as an "intangible cultural heritage". With a population estimated to 2.8 million in 2022, Albania ranks 140th in the world by population. The population density is 105 inhabitants per square kilometre. The overall life expectancy in Albania at birth is 79 years. The total fertility rate of 1.62 children per mother is one of the lowest in the world.

2. Tourism in Albania

2.1 Key facts on tourism in Albania

The Albanian government has identified tourism as a key economic sector, touting its potential to spur development of the entire country. Located in the Mediterranean region, Albania could well represent Europe's last tourism "secret." Tourism in Albania has been a key element to the country's economic activity and is constantly developing. It is characterized by its rich archaeological and cultural heritage dating back to the classical period. Notably the country features unspoiled beaches, mountainous landscapes, traditional cuisine, archaeological artifacts, unique traditions, low prices and the wild atmosphere of the countryside.

The coast, which stretches from the Adriatic Sea in the north to the Ionian Sea in the south, is underdeveloped and generally lacks Western-standard beach resorts. Given the rising influx of Western tourists, demand is growing for high-end resorts, particularly in the south. Albania also holds great potential for mountain tourism.

After peaking in 2019, the number of tourist arrivals to Albania decreased in 2020 due to the global disruption of tourism industry following the outbreak of COVID-19 pandemic. In 2020, only 2.65 million of foreign visitors came Albania compared to 6,4 million in the previous year. But during these last two years the sector is showing a speedy recovery, recuperating and overcoming the figures of 2019 (the best year before the pandemic). Europe is the main source of tourists visiting Albania taking up a volume of about 90% of all tourists, which reflects that the access >3 hours from one destination to another is still an important factor for the influx of travelers for tourism purposes. However, recently tourists from the United States of America, or Asia, and especially China, have shown a significant increasing

interest, thus indirectly encouraging the development of other tourism sub-sectors, especially the historical, natural and cultural tourism.

The country is living a new area on the air transportation with the beginning of low cost carrier operation, the operation of second international airport in the north, the terminal extension on Tirana Airport and on the new international airport on the south which is under construction.

Also a network of corridors, both roads and railway, including the Blue Corridor (Adriatic & Ionian autostrada North-Sud) and the Corridor VIII (West-East) which are under construction, are better accessing and connecting the main tourist destinations.

On the coastline, investors are focused to realize in the next months and years, not less than 5 new marinas which with the new marina in city of Durres for the mega yachts, will quintuple the birth marina inventory in the country creating a new perspective of nautical tourism.

		2018	2019	2020	2021	1 st half 2021	1 st half 2022
a	Total	5,926,803	6,406,038	2,657,818	5,688,649	1,687,982	2,553,747
1	Personal	5,839,626	6,304,845	2,542,643	5,588,400	1,644,191	2,502,453
1.1	Holidays, Visit to friends and relatives	5,639,818	6,094,889	2,458,530	5,412,079	1,521,281	2,332,202
1.2	Health treatment	276	658	353	1,504	913	498
1.3	Religious	778	794	326	488	246	244
1.4	Transit	198,754	208,504	83,285	174,817	63,549	91,892
2	Business and professional	87,177	101,193	115,175	100,249	43,791	51,294

2.2 Existing tourists' offers and infrastructure upon the POI-s

Such a rich treasure that Albania owns makes it a land of fascinating charm of many interesting alternatives that every visitor would like to enjoy. A place where ancient and modern life is intertwined, combining the charm of the past and the strength of the future.

Alpine tourism

The rugged mountain range offers diverse alternatives of unrepeatable experiences, electrifying challenges to experience a real adventure and dynamic holidays.

Cultural and historical tourism

The traces of important historical events one is bound to enjoy, the country enjoys wonderful cultural wealth

Tourism in archaeological treasures

Treasures of archaeological sites are more than wonderful. Located in very special areas of Albanian beauty, they hold an incredible wealth of history, art, culture, social and political development of the times.

Tourism in the miracles of the sea

All kinds of nature, in one place. In the South of Albania you can find yourself coexisting with mountain, sea, lake, hill and field altogether.

Tourism in Fantasy Sports

The sports tourism industry consists of many different forms of individual tourism and in groups of activities such as mountain climbing, hiking, extreme cycling, scuba diving, tennis, birding, skydiving, hunting and fishing

Tourism of beauty and health

In Albania there are many places with thermal waters or otherwise called "Lixha", as in Debar, Elbasan, Fushë Krujë, Përmet, etc. Beyond these, Albania has many areas with a very healthy climate. Health and beauty tourism can be defined differently as providing health and beauty services to promote healthcare offers or diagnosis in Albanian centers.

2.4 Challenges and Opportunities (SWOT)

A number of problems and challenges associated with tourism development have been identified over the years. They remain to be addressed further, while this strategic document seeks to find systematic responses to address them. Tourism in Albania faces these problems:

- **Lack of accommodation capacities and lack of quality accommodation** In areas that attract more tourists, whether coastal or not, the number of beds is very limited and furthermore with a low average per unit, which certainly has an effect on the total number of visitors. Another fact is added to the above effect that in most tourist destinations, accommodation facilities are mostly private houses, apartments and rooms, which offer very minimal conditions and poor services.
- **Lack of popular hotel "brands" and tour operators** The well-known brands of hotels and tour operators, for the vast majority of foreign tourists, are a guarantee of quality of service and, at the same time, serve as a guarantee of the reliability of a destination. Currently, there are no international hotel brands operating in Albania, neither in major cities nor in tourist areas.

- **Lack of tourist infrastructure** In Albania, besides the beauty of nature, additional tourist infrastructure is almost nonexistent. Amusement and recreation parks, conference and fairs centers, yacht harbors where sailing or underwater tourism can be launched. are hardly present at all.
- **Lack of standardization and system of classification** In Albania, accommodation facilities and other tourism service providers are not classified according to the standards for the services they provide.
- **Short tourism season** Although Albania has a typical Mediterranean climate, which makes our country enjoy 250 days of sunshine, the tourist season in Albania is limited to July and August only. Although there is a demand for services for a long period of the year, supply is lacking as sporadic development to date has given tourism a highly seasonal character. For this industry to become one of the pillars of the Albanian economy, the seasonal effects of coastal tourism need to be mitigated through the development of other forms of tourism, increasing the number of visitors, overnight stays and consequently tourism revenue.
- **Informality in tourism activities** Many of the accommodation facilities, but also other service providers, such as restaurants or tourist guides, operate in full informality by creating the ground for low quality services, affecting the safety of tourists and the image of the place.
- **Solving the problem of ownership** Like many other sectors of the Albanian economy, tourism has been significantly hampered by ownership problems. Failure to resolve these problems and the numerous social conflicts that accompany them have kept many large domestic and foreign investors away and blocked many major tourism projects.
- **Lack of private capital investment hinders consolidation of the sector** Almost in the entire coastal area, but also in many other cities with potential for tourism, the investments made so far, with some exceptions, are small, making the sector unconsolidated. For Albania's tourism offer not to be sporadic, this sector must necessarily be consolidated by attracting large and credible investors and promoting major strategic projects.
- **Strong lack of training of employees in the tourism sector** In terms of human resources and services offered to tourists, they leave much to be desired and a training program is needed to foster a quality leap in tourism.
- **Few connections between air and sea transport** Albania's ports and airports offer few travel opportunities for foreign visitors. With the exception of Italy, direct flights and sea connections to many of Europe's major cities and states are missing.
- **Poor infrastructure at destination** Infrastructure at tourist destinations still leaves much to be desired, starting with the energy and water networks, and continuing with connection routes with destinations, parking spaces, etc.
- **Lack of development of an offer included in a tourist destination** Beyond the natural and historical-cultural attractions, Albania's tourism offer is poor and the opportunities to combine different types of tourism are scarce. Although opportunities are available in the territory, the lack of a diverse and comprehensive tourist offer, which combines the best of tourist attractions, has limited the potential for increased tourist overnight stays, increased spending and balanced distribution in the territory.
- **Poor use of Information Technology** The use of information technologies in the tourism industry is limited. With the exception of a sporadic case, usually with the help of international organizations, the provision of digital services to tourists is still underdeveloped. Their use is at the same level for marketing services and products and for selling in the markets.

In a more strategic analysis the reality can be described as below:

STRENGTH

- • Traditional hospitality of local population preserved on the rural areas;
- • Historic and archeological cities with great cultural, religious, architectural heritage;
- • Diversified tourism offer (sea, cultural, natural);
- • Diversified culinary (national, ottoman, Italian and Mediterranean)
- • Favorable climate characteristics;
- • A prioritized tourism sector;

WEAKNESS

- • Missing of Strategic plans;
- • Tourism Seasonality;
- • Poor Environmental control;
- • Limited Ecotourism offer;
- • Poor cultural tourism products;
- • Promotion/marketing model;

OPPORTUNITIES

- • Using the quality products and services, and local uniqueness;
- • Integrating the natural and cultural heritage with the newly form of doing tourism (cycling, adventure tourism on mountain, river and sea);
- • Improvement of new mobility infrastructure (airports, railways, ports, intermodal local centers);
- • New thematic routes and mostly the intraregional routes under the Council of Europe Cultural Routes program;
- • Development of ICT for tourists and local operators;
- • The diversification of tourist offers;

THREATS

- • Threats from the unfriendly practices to the environment;
- • Overpricing of real-estate;
- • Poor coordination between stakeholders;
- • Loss of cultural identity;
- • Competition with other EU and non EU countries;

3. Participatory mapping

3.1 List of selected POI-s

After conducting a thorough analysis, 400 Points of Interest were identified within Albania, and are distributed across 10 counties. The following is an illustration of the distribution of the identified tourist, cultural and naturalistic sites within the country.

3.1 List of selected POI-s

After conducting a thorough analysis, 400 Points of Interest were identified within Albania, and are distributed across 10 counties. The following is an illustration of the distribution of the identified tourist, cultural and naturalistic sites within the country.

In detail, the selected territories contain the total number of POIs as shown in the next illustration:

POINT OF INTEREST	REGION
Rozafa Castle	SHKODRA REGION
Lead Mosque	
Marubi Museum	
Museum Site of Witness and Memory	
Saint Stephan Cathedral	
Theth National Park hiking	
Alps (Grunas), hiking	
Valbona National Park Hiking	
Tamara	
Koman Lake Kayaking	
Mesi Bridge (ura e mesit)	
Ebu Bkr Mosque	
Old town Kole Idromeno Street	
Tamara (Lepushe village)	
Vermosh	
Drisht	LEZHA
Lezha Castle	
Skanderbeg Memorial	
Kallmeti Winery	
Mrrizi I Zanave	
Kune Lagoon	
Patok Lagoon	
Shna'Ndou Church	DURRES
Spac Prison	
Celami winery	
Shengjini Beach	
Durres Amphitheater	
Durres Castle	
Fatih Mosque	
Byzantine Forum (Macellum)	
St Anthony church	



Archeological Museum	
Parashkevi Church Kavaja	
Cape of Rodon	
St Vlash Monastery Sukth	
Lalzit bay	
Agroturism Gjepali	
Agroturism Popi	
Agroturizm Huqi	
Byzantine Forum (Macellum)	
The Rodon Castle	
Ishmi Castle	
Bashtova Castle	
Gjenerali Beach, Turra caslte	
Paganini Ship	
Pozsony Ship	
Albano Ship	
Onufri National Museum	
Osumi Canyon	
Berat Castle	
National Ethnographic Museum	
Gorica Bridge	
Osumi Rafting; Albania Tours	
Lead Mosque	
King Mosque (Sultan's Mosque)	
Halveti Tekke	
Bachelors' Mosque	BERAT
Holy Trinity Church	
Saint Demetrius Cathedral	
Red Mosque	
St. Mary of Blachernae Church	
White Mosque	
Luani winery	
Shen Thomai Church	
Cobo Winery	
The Tomorr National Park	
Bogove falls	
Blezencke	
The Italian hospital ship Yes	
The bay of Shen Vasil	VLORA
Bay of Shën Jani	
Cave of Haxhi Ali	
The bay of Dafina	



The bay of Bristan
The bay of Grama
Bay of Shën Andreu
The island of Sazanit – Admiral Beach
The ruins of Andromeda
Place of amphorae
The ruins of Lucianos
Piroskafi Italian
The monastery of Zvërnec
Llogara National Park and hiking
Çika's peak - hiking
Narta lagoon

Dukat agroturizem
The bay of Saranda and city
The bay of Ksamil
Mirror Beach
Lekursi Castle
Onhezni old town ruins
Monastery of 40 Saints
Saint Nicolas Monastery, Mesopotam
Blue Eye
Butrint National Park
Christian Basilica Butrint
Roman Theater Butrint
Venetian Tower and Museum Butrint
Seagull Beach
Lake Butrint
Kroreza Beach
Monastery Beach
Saint Georges Monastery Deme
Kakome Beach
St. Mary.s monastery Kakome
Roman Temple Butrint

SARANDA

Prespa Lakes
Prespa National Park
Maligrad Island
Drenova National Park
National Mediaeval Art Museum
First Albanian School Mesenjtoria e Pare
Kamenica Tumulus
Archeological Museum
Bratko Oriental Art Museum

KORCA

Old Bazaar	
Elbasan Inn	
Christs Revival Cathedral	
Andon Zako Cajupi Theatre	
Voskopoja	
Dardha	
Boboshtice	
St Nicholas Church	
St Mary Church	
The church of "St. Friday"	
St. John the Baptist Monastery	
Vithkuq	
Lake Ohrid	
Drilon Spring	
Saint Marina Monastery	
The Fortress	
The Art Gallery	
The lakeside park	POGRADEC
The monumental Tombs of Selce	
Lin Mosaics	
Drilon	
Tushemisht	
Lin Village	
The bridge of Golik	
National Park "Bredhi i Hotoves"	
Termal waters Benje	
Saint Maria Church of Leuse	
Tekke of Baba Aliu	
Guri i Qytetit - City stone	
Gryka e Kelcyres - Kelcyre Gorge	PERMET
Orthodox church of Saint Nikolas (Shen Koll)	
The church of Saint Friday (Kisha e Shën Premtes)	
The castle of Bolenga (Kalaja e Bolëngës)	
The bridge in Benje (Ura e Bënjës, Ura e Kadiut)	
Langarica Canyon Permet	
Sopoti Waterfall	
Sarandoporo, Leskovik	
Restorant Antigonea	
Sotira Farm	KORCA
Arms Museum	
Kordhoca bridge	GJIROKASTRA
Archaeological Park of Antigonea	

Traditional Taverna - Taverna tradizionale

Restorant Traditional Odaja

Kujtimi restaurant

The barrels - te fucite

Castle of Gjirokastra

Zekate House

Ethnographic Museum

Skenduli House

The cold war tunnel

Gjirokaster Obelisk

Ismail Kadare's House

Gjirokaster bazaar

Viroi Lake and Cave

Mosque Pazari

Gjirokastra Museum

Gjirokastra as UNESCO city

Libohova old village

Dhoksat

Bunk'Art

Bunk'Art 2

House of Leaves (Museum of Secret Surveillance)

Natural Sciences Museum Sabiha Kasimati

Galeria E.Rira

Petrela Castle

Saint Paul Cathedral

Tirana Castle

Kadare's House Museum

Resurrection of Christ Orthodox Cathedral

National Archaeological Museum

Mosaic of Tirana

The Botanical Park of Tirana

TIRANA

Farka Lake

Brari Bridge

Lana river

Kus Lake

Paskuqan Park

Dajti - Dajti Mountain National Park

Restorant Tymi

Grand park of Tirana

The Black Cave of Pellumbas

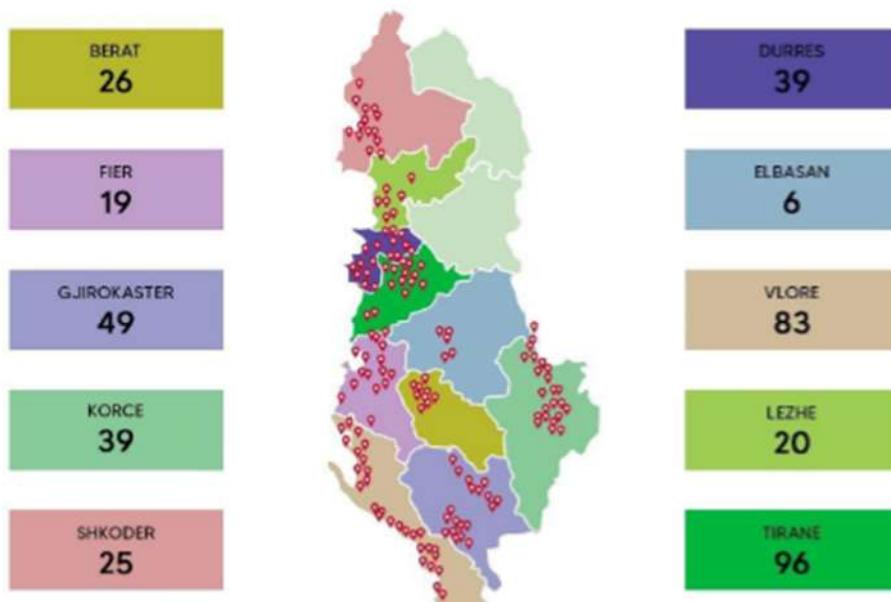
Zoological Park of Tirana

Skanderbeg Square

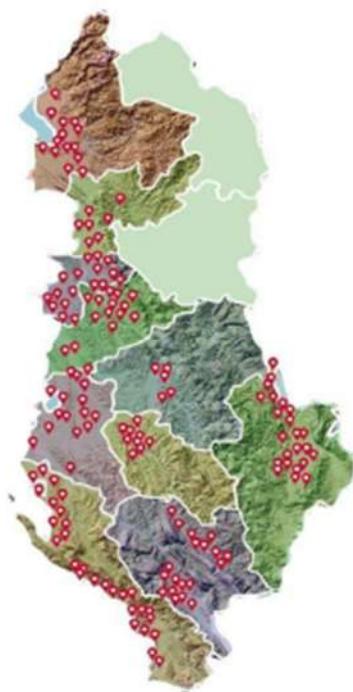
Pazari I Ri	
Palace of Congresses	
Shetitorja Murat Toptani	
National Gallery of Arts	
Pyramid - International Culture Centre	
The Clock Tower	
National Museum of History	
Great Mosque of Tirana	
Ethem Beu mosque	
Peze Village	
Sarisalltik	
Kruja Castle	
Ethnographic Museum of Kruja	
National Park of Qafeshtama	
Skanderbeg monument	KRUJE
Gjergj Kastrioti National Museum	
Murad Bey Mosque	
The Old Bazaar	
Albanopolis Ruins, Zgërdhesh village	
Ardenica Monastery	
Seman beach	
The Byllis Archaeological Park	
The National Park Divjakë -- Karavasta	
Hekal	
Karavasta lagoon	
Red church of St. Thanas Karavasta	FIER
Divjaka Fish Restaurant - culinary	
Ardenica Monastery	
Apollonia Monastery of Saint Mary / Apollonia	
Archaeologic Museum	
Apollonia Archaeological Park	
Apollonia Amphitheater	
Monastery of Panaia - Dhermi	
Saint Harallambos Church - Dhermi	
Church of Saint Spiridon - Dhermi	
Old Village Vuno	
Livadhi Beach	
Himara Beach	
Llaman Beach	
Himara Castle and old town	
Monastery of Saint Mary Athalotisa	
Filikuri Beach	HIMARA



Lukova Beach
Buneci Beach
Pirati Cave
Vasiki castle Porto Palermo
Jala (beach)
Porto Palermo beach



3.2 Map of the selected POI-s



3.3 Tour Operators and involved stakeholders

There are almost 500 Tour Operators operating in Albania. Some of them are very specialized on typical tourism products, some on specialized one and some can assemble all kind of products.

More specifically the tourist operators offers usually the below mentioned products:

Alpine tourism

The rugged mountain range offers diverse alternatives of unrepeatable experiences, electrifying challenges to experience a real adventure and dynamic holidays.

Cultural and historical tourism

The traces of important historical events one is bound to enjoy, the country enjoys wonderful cultural wealth. With an untouched rural environment and some very well preserved cities, two of them under the protection of UNESCO (Berat and Gjirokastra), tourists can relive the past.

Tourism in archaeological treasures

Treasures of archaeological sites are more than wonderful. Located in very special areas of Albanian beauty, they hold an incredible wealth of history, art, culture, social and political development of the times. Albania has different archeological parks, one of them under protection of UNESCO, where are shown the real signs of Roman and Greek civilization.

Tourism in the miracles of the sea

All kinds of nature, in one place. In the South of Albania you can find yourself coexisting with mountain, sea, lake, hill and field altogether. Along a shore of 450 km is enriched by virgin and pristine areas, where tourist can enjoy the beauty of nature, local traditional culture, comfort, culinary and hospitality.

Tourism in Fantasy Sports

The sports tourism industry consists of many different forms of individual tourism and in groups of activities such as mountain climbing, hiking, extreme cycling, scuba diving, tennis, birding, skydiving, hunting and fishing. Different international festival are organized, promoting the adventure tourism.

Tourism of beauty and health

In Albania there are many places with thermal waters or otherwise called "Llixha", as in Debar, Elbasan, Fushë Krujë, Përmet, etc. Beyond these, Albania has many areas with a very healthy climate. Health and beauty tourism can be defined differently as providing health and beauty services to promote healthcare offers or diagnosis in Albanian centers, which are well known for their professionalism and good prices, attracting more and more customers from Italy, Germany, France.

4. Action Plan – Developing the strategy

4.1 Platform long term vision for integrated digital tourism in Albania

Hospitality and tourism is a less digitalized sector, but it is much more clear and optimistic about its plans for the future: 70% of companies want to invest up to 35% of their revenue in digital transformation in the next year. They are especially interested in investing in digital marketing and digital payments. This makes sense considering that most of the companies in the sector have websites, but few have hired dedicated staff for digital marketing. Instead, most businesses engage existing employees that are not specialized in digital marketing.

The main root cause for the underutilized potential of digitalization in the tourism sector is that companies do not believe that there is a business case for investing in digitalization. However, this is changing as they are planning to invest more in digitalization projects. Therefore, ICT companies in Albania need to develop and promote the business case for investing in digital solutions to tourism sector.

Other root causes are the lack of technical skills and digital strategy. Digitalization is not only about having IT staff and equipment. The study shows that digitalization requires a mindset change that should be part of the organizational culture. Investments and capacity building of the businesses' management and their teams in all sectors need to be increased to build their capacity to develop digital projects. Digital skills development should target not only the supply side, the ICT sector, but also the demand side, the different economic sectors, to tap into full the opportunities of digitalization.

Digitalization adds value to products and services and enables companies to innovate and increase their competitiveness and sustainability. It is crucial to see digitalization not only as a growth mechanism but also as a strategy that will lead to sustainable business models and thus create new jobs for young women and men in Albania.

4.2 Policy context

Based on the main challenges of the tourism industry identified, which relates to:

- Providing access to tourist destinations, improving destination infrastructure and promoting tourism infrastructure development;
- Regulation, standardization and certification of accommodation facilities and other tourism services;
- Promoting an integrated tourism product and improving the country's image;
- Establishing an efficient system of continuous professional training of human resources engaged in tourism;

The government has defined five strategic goals:

- I. Creation of new development industries and clusters as well as consolidation of the tourism offer and creation of new products – The goal is to encourage the creation of 6 integrated poles with tourism potential, that will focus on the public investment interventions, will extend the geographical spread of destinations, and increase the time of stay not only throughout the summer season, but throughout the year. In addition, through the use of regulatory and facilitation instruments, the improvement of the quality of accommodation facilities shall be promoted by supporting the regeneration of the existing ones and encouraging new investments in 4-5-star facilities, tourism activities shall be combined by moving towards a consolidated offer as well adding new tourism products as an expression of the unused potential of the country.
- II. Increasing the added value and impact of the sector on the economy and employment – The goal is that by prioritizing public investment, promoting private investment, attracting a larger number of tourists and increasing their stay in the country, the tourism industry will become one of the three main pillars of the Albanian economy and one of the safest sources of new jobs.
- III. Development of new products and services in tourism, as well as improvement of their quality – The goal is to standardize and certify tourism service providers through regulatory, facilitation and supportive interventions, and to support the improvement of the quality of other services by establishing a continuous professional training system for all human resources in the tourism industry.
- IV. Improving the image of the country and promoting authentic local products. – The goal is, through a smart marketing campaign, to promote Albania's natural, historical and cultural assets, improving the country's international image and attracting more visitors.

4.3 Action Plans

The Ministry of Tourism and Environment, has analyzed the ways country is promoting his assets and potentials of tourism development.

In the same time in close cooperation with international organization (Swiss Agency for Development and Cooperation, World Bank, GIZ and other actors) the Ministry is guiding a process to pilot for the first time the Destination Management Organization concept on municipality level and more. Different models have been analyzed for their compatibility on the Albanian context and the process is still in progress.

However, it's quite evident that National Tourism Agency which its role will be adapted on coherence with the best model chosen on DMO, will be the leader on the tourism promotion of the country and on the application of smart and digitalized technologies.

On these years the Agency has managed a budget of approximately Euro 1.2 milion, with a professional team of 25 peoples. They have been able to organize the participation of the country on more than 15 yearly international activities, showing on different markets the opportunities of the country and facilitating the presence of more than 20 albanian tourism companies.

With an extended experience on managing the Albanian tourism portal www.albania.al and different social channels (Facebook, twitter, Instagram, YouTube, Flickr, etc) showing a good ability to adapt the most ultimate tools and digital application to organize and distribute info on products, destinations and points of interest.

Since a reform that will boost the functionality of Agency is in progress, the responsibility to manage and to take over the system will be granted to them, and a detailed plan related to the timeline, costs and financing, will be prepared to ensure the effective use of it.

1. Puglia

1. 'The structure of the developed platform

In the field of tourism, augmented reality will be a fundamental tool, especially for museums and cultural realities, thanks also to the impulse that this experience has had during the two-year Covid-19 pandemic. According to Capterra's research, 58% of Italians have opted for a virtual tourist experience, while 19% have never tried them but are intrigued by them. It would seem almost unthinkable that, according to the statistics, in so many cases [Italians have been able to choose to visit an exhibition thanks to a virtual tour, or have been able to virtually visit a forest thanks to a system of cameras installed inside, or have been able to virtually participate in many cultural events by using live streaming. For the future, the respondents expressed the wish to visit museums (47%), exhibitions (39%), participate in cultural events (35%), go on excursions and tours (31%) and guided tours (30%). The methodology adopted by the Puglia Region for the selection of the 150 Points of Interest on virtual tours in the region took into account the factors highlighted by the analyses in the introduction. Aiming to increase the attractiveness of the territory's natural and cultural resources, in order to improve intelligent and sustainable economic development, assets of a historical, cultural, touristic, naturalistic and intangible heritage character were selected to represent the considerable facets of the regional heritage, networking iconic assets and lesser-known but undoubtedly valuable sites, and to meet the need to make virtual a varied heritage, with its uniqueness and singularities that make each point of interest iconic. The virtual tours, consisting of 360° panoramas, photographic hotspots and metadata accompanied by detailed descriptions of the characteristics of the Point of Interest represented, are made accessible to the potential virtual visitor through a digital platform. The software platform makes it possible to create and publish interactive virtual reality content, that is, virtual tours consisting of a series of 360° images linked together by interactive navigation arrows that can be explored with the aid of graphic navigation tools, with the aim of immersing visitors in virtual reality. The system allows, on the part of the content producer, a complete editorial autonomy, by means of an evolved editing mechanism, through a dedicated panel that allows to carry out, in total freedom, all the editing and publishing operations necessary for the management of the information of interest and interoperability components for the exchange of information with other regional portals involved in the project. Virtual Tours can be used by visitors through a browser, without the need to install other software or tools, with the integration of interactive hotspots and allowing visitors to navigate by wearing a device (VR visor or cardboard) through which they can totally immerse themselves in virtual reality. A practical menu renamed according to the main areas of interest allows users to select the portion of territory of interest, select recommended itineraries and, after selecting the specific Point of Interest, easily reach the desired overviews and rearrange contents to enjoy a more intuitive navigation experience.

1.2 European pillars chosen for implementing Tourism Policy Development

The European Structural and Investment Funds (EIS) regulation package adopted on 17 December 2013 by the European Parliament and the Council emphasises that Member States focus support on actions for smart, sustainable and inclusive growth in line with the Europe 2020 policy priorities.



Below is a list of the Points of Interest included in this area, distributed throughout the whole territory.

POINT OF INTEREST	CITY	PROVINCE
Pulo di Altamura	Altamura	Bari
Centro visite Grotta di Lamalunga	Altamura	Bari
Cava Pontrelli	Altamura	Bari
Museo Fondazione Ettore Pomarici Santomasì	Gravina in Puglia	Bari
Ponte Viadotto Acquedotto	Gravina in Puglia	Bari
Succorpo cattedrale	Gravina in Puglia	Bari
Ipogei Santa Sofia	Gravina in Puglia	Bari
Jazzo Pantano	Gravina in Puglia	Bari
Pulicchio di Gravina	Gravina in Puglia	Bari
MUMA - Museo della Maiolica	Laterza	Taranto

The northernmost area is part of the so-called Alta Murgia, protected by one of the two national parks in the region, covering 68,077 hectares. It is one of the most important steppe areas in Italy, and is characterised by a succession of rocky ridges, dolines, gentle hills, swallow holes, karstic cavities, steep escarpments, ravines, extensive natural pastures, oak and coniferous forests, where the perennial action of nature mixes and coexists with the millenary action of man, who has built stone farms, sometimes fortified to defend themselves from attacks by marauders, equipped with fences and stables for the flocks, cisterns, snowdrifts, churches, ponds and endless grids of dry-stone walls.

Not only nature: the area is populated by villages rich in history, including Altamura, the city of Frederick II, with the beauty of its historic centre, or Gravina in Puglia, with its network of small roads leading to its ravine crossed by the majestic Roman aqueduct-bridge, connecting the city with the surrounding countryside.

Descending further south-east, the territory enters into the Tetra delle Gravine: the land changes face with the presence of the largest karst canyons in Europe. From Laterza - where there is a very important tradition linked to the artisan production of majolica ceramics - to Gravina in Puglia, there is one of the most important natural areas in Europe, consisting of impressive karst canyons arranged in a fan shape around the Tonic arch of the Gulf of Taranto. It is an authentic natural paradise that reveals breathtaking landscapes and panoramas at every step, where time is marked by the passing of the seasons, as well as the flight of rare birds that guide the eye, in silence, towards small churches carved into the rock, rock cavities inhabited since ancient times and vegetation with unique characteristics. On the slopes of two ravines rises Massafra, one of the capitals of the Italian rupestrian world.

The town is dotted with caves and hypogean environments that preserve extraordinary evidence of the life that man has led there for millennia, which today is also famous for its carnival. Descending into the valley, towards the gulf, we reach Taranto, the largest Magna-Greek city of antiquity in southern Italy, where the splendours of the past are revealed with precious artefacts and underground itineraries, to discover frescoed tombs and hidden treasures. Not only archaeology, but also fine beaches that run from the Gulf of Taranto all the way down to Salento, characterising the Ionian coast of Puglia, which has become a favourite destination for seaside tourism over time. The coast consists of valuable ecosystems, including the Salina dei Monaci, a valuable natural oasis protected by the Riserva Naturale Regionale Orientata del Litorale Tarantino Orientale.

Not far from Taranto is Crispiano, known as the 'City of a Hundred Farmhouses', some of which have been active since 1400 and preserve a priceless heritage of typical cultivars, including the yellow tomato, and Grottaglie, the home of world-renowned ceramics. Going up the Murgia hill, towards the Itria Valley, there is another naturalistic area of great value, the Pianelle Forest, one of the most important and extensive green jungles in Puglia. The forest lies within a large karstic sinkhole (Gravina del Vuolo) and its dominant flora consists of an ilex grove with specimens of extraordinary size, remarkable to the point that the illustrious botanist Valerio Giacomini called them 'among the most beautiful in Italy'.

The forest touches the borders of the city of Martina Franca, in whose historic centre can be admired some of the most beautiful Baroque and Rococo architecture in Puglia, starting with the Ducal Palace, now the Town Hall, and ending with the Basilica of San Martino. Martina Franca stands on one of the slopes of the Valle d'Itria, a karstic depression covered by the unmistakable reddish earth once cultivated exclusively with grapes.

Manual skills and craftsmanship are symbols of this territory: not far from Martina Franca, in fact, there is Grottaglie, the city of ceramics. This is the centre with the most important handicraft production of ceramics in the region, a tradition handed down from generation to generation, with hundreds of workshops populating an entire district, adjacent to the historic centre. The production of Grottaglie's ceramists is known throughout the world, for the particularity and artistic refinement of the artefacts that the master potters make.

Grottaglie, however, is not only the pole of Apulian ceramics, but was chosen to host, in its airport, Italy's first operational spaceport for suborbital flights. The coastline of the territorial area under analysis is dominated by the city of Taranto, which stretches along three natural peninsulas and an island, the oldest nucleus of the city and connected to the mainland by a 19th-century bridge on one side and a swing bridge

on the other, designed and built at the end of the 19th century, but subsequently modernised in the late 1950s. Taranto is an ambivalent city: its glorious past as the capital of Magna Graecia has left tangible signs even today in every corner of the Old Town, which combine with the great seafaring tradition and shellfish farming in its Mar Piccolo. On the other hand, however, Taranto has undergone an industrial evolution that began with the construction of the military arsenal - one of three still active in Italy's navy - and the largest steel production centre in Europe, in the 1960s, which has caused considerable problems with air and soil pollution in the years to come.

3 Step 2

3.1 Key facts about the tourism industry in the reference area

According to the research carried out by the Tourism Observatory of the Puglia Regional Agency, between 2015 and 2019 tourist arrivals and presences in the selected area have been steadily growing. In some areas (area pertaining to the province of Taranto) this growth was significant, with an increase, for example, of international travellers of 50% in arrivals and 40% in presences, and in other areas with figures doubled compared to the past (area of the province of Bari).

Tourism in the Magna Graecia, Murgia and Gravine area is historically characterised by a predominantly national composition of flows. Despite the growth, foreign arrivals, in 2019, accounted for 20% of the total arrivals recorded in the province of Taranto, for example. The origin of tourists and the prevalence of the seaside offer over other products, although present in the area, influence the seasonal distribution of flows: about 50% of arrivals, in fact, were concentrated in the three summer months.

In 2021, the share of summer arrivals rose to 70%. The main foreign markets follow the regional composition (in order: France, Germany, Switzerland, the Netherlands, Belgium), with considerable growth in long-haul markets, namely Japan, Russia (before the Ukraine conflict) and Australia. Seasonal spread is comparable to the national trend, especially among Italian tourists. This is a positive fact, which is mainly linked to the destination's offer, considered multi-product. The relationship between territory and traveller is considered very positive by travellers' online sentiment at the end of their experience in the territory, with both accommodation and catering rated highly.

diffuse intangible heritage	precarious work
great events	lack of infrastructure in some territories
unesco heritage	Accessibility
	strong seasonality
	reception services
OPPORTUNITIES	THREATS
quality food and wine offer	Russian, Chinese, Indian market collapse
growing bike product	Overtourism
art, culture, architecture	crime
spiritual/religious tourism	bureaucracy
naturalistic inland areas	coastal erosion
Paths	depopulation of small villages
nautical tourism	
congress tourism	
outdoor tourism	
Connectivity	
DMO	

3.4 The existing communication channels and information materials

The territorial communication activities are carried out following the strategies outlined by the Puglia365 Strategic Tourism Plan of the Puglia Region, implemented through the participation of all the territories and their public and private stakeholders and led by the Pugliapromozione Regional Tourism Agency.

The Agency represents the operational vehicle of the Region's policies for the promotion of the unified image of Puglia, working in conjunction with the local authorities with a view to sustainable development and the values of brand identity, welcome and hospitality. The promotion and communication activities of the Puglia destination and its typical territorial features are carried out through digital and offline channels, with the following objectives:

- to make Puglia known and make it more attractive as a destination in its natural, landscape and cultural, tangible and intangible components, enhancing excellence, promoting the economic development of the territory, food and wine;
- to promote the qualification of the regional tourism offer by favouring its competitiveness on national and international markets and by supporting cooperation between the public and private sectors within the scope of sectoral interventions;
- to promote the meeting between the regional supply system and the mediators of international tourism flows;

4 Step 3

4.1 Survey analysis and outcome workshops and focus groups with stakeholders

In order to design and implement the pilot initiatives proposed below, the Tourism, Cultural Economy and Territorial Enhancement Department of the Puglia Region, with the support of Tecnopolis PST undertook a participatory process with the stakeholders of the territory, focused on the impact that digital tools have on tourism-related business performance. The participation process began with the distribution via e-mail of 2 Google form containing the Analysis of the needs of tourism operators to all the stakeholders involved in previous European cooperation projects (Smartmed, Medusa, Inherit).

Below is the link to the questionnaire administered:

<https://docs.google.com/forms/d/1aPCuTbNHIp4leoyN3s9XtdUJfenXZeUgu6qi0dHmo/edit>

About 100 answers were obtained (see the excel file in the attached deliverables), enough to better understand the needs that emerged from the operators, in particular on the need for training and digitisation for Smart destinations, their knowledge of the regional DMS and how it was useful for their business.



Approximately 100 responses were obtained (see the excel file in the attached deliverables), enough to better understand the needs that emerged from the operators, particularly on the need for training and digitisation for Smart destinations, their knowledge of the regional DMS and how it was useful for their business.

The realisation of the Action Plan has followed a methodology involving the analysis of the sector's needs expressed through the on-site interviews with stakeholders and the results of the forums and workshops realised within the framework of several cross-border cooperation projects carried out over the past two years. These results were cross-referenced with the analysis of the territory's needs carried out by the Pugliapromozione Regional Agency during the participation meetings held on the occasion of the renewal of the Regional Strategic Plan for Tourism and Culture and the potential of the Interreg Due Mari - Next Generation Tourism Development project.

PART I – general information

Project: DUE MARI – NEXT GENERATION TOURISM DEVELOPMENT

Partner organization: PUGLIA REGION – DEPARTMENT OF TOURISM, ECONOMY OF CULTURE AND VALORISATION OF TERRITORY

Other partner organizations involved (if relevant): INNOVAPUGLIA S.P.A.

Country: ITALY

NUTS2 region: PUGLIA

Contact person: ANNA INTRONA

PART II – Policy context

The Action Plan aims to impact: Investment for Growth and Jobs programme
 European Territorial cooperation programme
 Other regional development policy instrument

Name of the policy instrument addressed:

- **ROP ERDF/ESF 2021/2027 of Puglia Region**

The programme covers all the Puglia territory and it is structured according following Priority Axis:

Axis 1: Priority Axis I “Competitiveness and Innovation’ (ERDF):

- Developing and improving research and innovation capacities and the uptake of advanced technologies (RSO 1.1)
- Developing skills for smart specialisation, industrial transition and entrepreneurship (RSO 1.4)

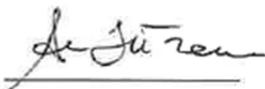
Axis 2: Priority Axis VII “and health’ (ERDF and ESF+):

- Strengthening the role of culture and sustainable tourism in economic development, social inclusion and social innovation (ERDF) (RSO 4.6);

Axis 3: Priority Axis VIII “Urban development’ (ERDF):

- Promoting integrated and inclusive social, economic and environmental development, culture, natural heritage, sustainable tourism and security in urban areas (RSO 5.1);

Bari, 25/01/2023

Signature: 

Stump of the Organization _____



7 Step 5

7.1 Stakeholder workshops and good practices

Based on the result of the itineraries, of the selected point of interests etc. the partnership will be able to elaborate a joint sustainable tourism development strategy and action plan in order to act together and create next steps. This part will allow us to establish a new regional cooperation network thanks to same study/analysis and to the creation of new potential itineraries in all 4 program areas.

The activity aims at spreading the essential technical information as well as practical experiences:

- * guidelines in a cross border capacity building program meetings/ focus groups with public and private actors to design and starting to work on a common idea in order to implement the Strategy for joint management (public authorities, research, tourism operators - business)
- * Best practice dossier (to upload on the platform) on the itinerary improvements and how these improvement were achieved and possibly replicated in the future

There will be done through: -

1 (total 4) local workshop for each partner/territory to be delivered to staff and stakeholders in order to prepare and share the best practices:

- Period: october 2022 or march 2023 (deseasonalised periods to involve more tourism stakeholders)

- Venue: to be decided according the itineraries implemented

- Length: 4 hours in presence + itinerary showing - Objective: the objective is acquiring web-based tourism valorization techniques from stakeholders. The workshop will start from the strategic reading of the local and national context and the capacity for innovation and integration of cultural and creative products with other economic sectors. The workshop will also be an opportunity to consolidate the management and managerial skills of the participants. Due to the ongoing health emergency and possible new restrictions, the workshop can also be held in telematic mode. In fact, the RTI has technologies at its disposal that are capable of realizing and managing numerous activities of an experiential nature, such as exercises, working groups and role plays, even remotely.

7.2 The importance of Training in tourism sector, especially of digital training to support Smart Destinations

To gain a new competitive advantage by applying a smart strategy, starting from the exploitation of the data and information that the network is able to provide. Tourism is a strategic asset for Italy, as well as for the entire MED area. And the hospitality industry must continue to invest in innovation, accessibility and sustainability as well as focus on integrated training and marketing activities to ensure a quality offer. New trends in tourism demand and digital technologies have indeed brought a significant transformation in the tourism industry, revolutionizing businesses, tourism products and experiences, business ecosystems and tourism destinations.

Digitisation has also transformed the traditional roles of tourism producers and consumers, with the emergence of new roles, relationships, business models and skills. The rise of digital platforms has expanded the variety and volume of tourism products, services and experiences, with on-demand features accelerating the speed of economic interactions and transactions, market awareness and feedback. These changes have created new opportunities, as well as challenges, for tourism businesses - mostly micro and small enterprises - as they strive to meet consumer demand and reach new markets. But only coordinated planning to promote an innovative digital culture in tourism SMEs and territorial tourism systems can ensure that destinations are more competitive and that the various destinations that populate a complexity of very fragmented offers in the vast world market are enhanced.

This is why we need to work to build "smart tourism destinations" and develop skills to create/innovate services and businesses. Being "smart" in tourism means offering innovative digital services that can improve the experience of travellers, the management of destinations, and the management and marketing of businesses in the sector and beyond. In many parts of the world, even in this post-covid phase, companies, organisations and players in the tourism sector, globally, are equipping themselves to understand the opportunities

8 Step 6

8.1 Indicators to monitor the implementation of the Action Plan

The activities proposed within the Action Plan will be monitored through the following indicators:

- Number of products and services created
- Number of places/cultural heritage valorised
- Number of stakeholders involved in planning activities
- Number of stakeholders involved to implement activities