Monitoring and Evaluation of the European Strategy of Adriatic-Ionian Region (EUSAIR)

Pillar 4 „Sustainable Tourism“

2nd Annual report

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INTRODUCTION
Pillar 4 - Sustainable tourism -

• Aim of the Pillar 4:
  - develop the sustainable and responsible tourism potential of the Adriatic-Ionian Region, through innovative and quality tourism products and services
  - promote responsible tourism behaviour on the part of all stakeholders across the Region

• The specific objectives for the Pillar 4:
  - diversification of the macro-region’s tourism products and services along with tackling seasonality of inland, coastal and maritime tourism demand
  - improvement of the quality and innovation of tourism offer and enhancing sustainable and responsible tourism capacities of the tourism actors across the macro-region
OUR TASK - Monitoring and evaluation

- **Consortium partners:** Institute for Development and International Relation – IRMO and Ecorys Ltd.
- The contract with The Croatian Ministry of Tourism was signed on July 17th, 2020
- **Time period:** 6/2020 - 12/2022

- **3 main tasks:**
  - **Task T 3.1:** Building the Knowledge Base relevant for Pillar 4 „Sustainable Tourism“ (2 reports, collected sources of information)
  - **Task T 3.2:** Establishing the EUSAIR Monitoring and Evaluation Framework (4 monitoring reports)
  - **Task T 3.3:** Capacity building for public authorities (participation in 2 macro regional events, organization of 1 national event per country 11/2020)
Objectives of the Knowledge base presented in the report include:

- Illustrating all the available information;
- Combining all possible sources, including studies and surveys, databases, national and international sources, outputs of the projects, etc.;
- Allowing the macro-regional approach in managing the Strategy; and
- Planning the future interventions in the following programming period.

Deliverables are continuously updated:

- List of EUSAIR relevant projects
- List of EUSAIR research institutions and research studies relevant for identification of TSG4 key indicators
- EUSAIR list of key group of stakeholders relevant for the TSG4 topic
- List of EUSAIR sustainable tourism networks
KNOWLEDGE BASE CONTENT

• Relevant studies – 182 – 65 related to specific EUSAIR countries, one covering the EUSAIR area, 116 covering the EU and world

• Databases and portals – 6 identified – Virtual Tourism Observatory, ETIS dataset, European Projects Database, UNWTO, World Data Atlas and Tourism 2030 – a tourism portal.

• MRS.ESPON – three indicators regarding Sustainable tourism

• Statistics – main source EUROSTAT
  • Economy and Finance – three databases;
  • Population and Social Conditions – two databases;
  • Labour Market – three databases;
  • Education – four databases;
  • Health – three databases;
  • Information Society – eight databases;
  • Transport and Accessibility – six databases;
  • Environment and Energy – ten databases.
MONITORING AND EVALUATION INDICATOR SYSTEM

- **EU programmes analyzed**: ADRION, IPA Cross-border Cooperation Programmes, Interreg Italy – Croatia, Interreg Italy – Slovenia, Interreg Mediterranean, Interreg Greece – Italy, LIFE Programme, HORIZON Programme etc.

- The EUSAIR Indicators System includes indicators monitoring the **overall socio-economic context** of the EUSAIR area and indicators monitoring the context of the **specific thematic areas** covered by each Pillar.

- **Five groups of specific thematic** indicators:
  - output indicators
  - result indicators
  - impact indicators and
  - governance indicators
  - cross-planning indicators
MONITORING AND EVALUATION  INDICATOR SYSTEM (2)

30 suggested indicators:

• 8 related to general socio-economic indicators,
• 19 sustainable tourism (thematic specific) indicators,
• 3 cross-pillar indicators and

Not all of the suggested indicators are available and measured at the moment

Additional support from partners needed
INDICATORS MONITORING THE AIR SOCIOECONOMIC CONTEXT

• Indicators monitoring the Adriatic-Ionian Region socioeconomic context include indicators prepared by LKY Analysis for monitoring and evaluation of the whole EUSAIR strategy.
  • Population,
  • DGP per capita,
  • employment rate,
  • unemployment rate,
  • youth unemployment rate,
  • people at risk of poverty and
  • Human Development Index.
CONTEXT INDICATORS (MRS.ESPON)

- Key and proposed indicators through MRS-ESPON related to Pillar 4 – Sustainable tourism are:
  - Tourism direct contribution to GDP
  - Jobs in tourism industries
  - Number of UNESCO World heritage sites.

- Additional indicator – Number of EDEN destination (European Destinations of Excellence, aims to promote sustainable tourism development models across the EU)
OUTPUT INDICATORS

• Measure what is directly produced/supplied through the implementation of the co-financed projects, in physical or monetary units

• Outputs could be measured at the level of supported entities, provided goods or services delivered

• 3 suggested indicators:
  • Interregional investments in EUSAIR Pillar 4 related projects
  • Supported transnational cooperation networks
  • Innovation
RESULT INDICATORS

- Result indicators capture the expected effects on participants or entities brought about by a project.
- The EUSAIR Indicator System for Pillar 4 contains 8 Result indicators for both topics:
  - Number of arrivals
  - Number of bed places in hotels and similar accommodation establishments
  - Number of nights spent at hotels and similar accommodation establishments
  - Relative contribution of tourism to the destination’s economy
  - Daily spending per overnight tourist
  - Daily spending per same-day visitor
  - Occupancy rate in commercial accommodation per month and average for the year
  - Direct tourism employment as percentage of total employment in the destination
IMPACT INDICATORS

• Impact indicators are linked to the higher level of strategy objects, capturing the effect of the co-financed interventions in the whole EUSAIR area.

• Two impact indicators:
  - Strategies and action plans developed in the field of natural and cultural heritage and tourism;
  - Joint tourism products developed and promoted.
GOVERNANCE INDICATORS

• The EUSAIR governance indicators have been proposed by LKY in the report, EUSAIR Pillar 1 – Blue Growth EUSAIR Monitoring and Evaluation Framework. Set-up of the monitoring and evaluation indicator system.

• Out of four indicators suggested in mentioned report, two governance indicators are supported in this report:
  - Attendance of TSG4 meetings and
  - number of projects ideas generated by the TSGs
CROSS-PILLAR INDICATORS

• Cross-pillar indicators are those which measure the total effect of the EUSAIR implementation as a consequence of cooperation between Pillars.

• Suggested cross-pillar indicators are:
  - innovation
  - total employment and
  - transnational networks

• The estimation of those indicators for all EUSAIR Pillars could lead to the integration of the values at the EUSAIR level.
2\textsuperscript{nd} Annual report - CONTENT

1. Sustainable tourism in the Adriatic – Ionian Region
2. Implementation // new developments
3. Governance and cooperation
4. The way forward

Literature
SUSTAINABLE TOURISM IN THE EUSAIR region

General info
• popular touristic destination
• 2012-2019 95.1 million of tourists arrived in the EUSAIR countries
• Lank of recent data for 2019 in Albania, Bosnia and Herzegovina, Montenegro and Serbia

Project related info
• 3 mono-pillar project ideas developed
• 4 cross-pillar project ideas developed
• 313 projects implemented
• 18 networks identified
• 30 indicators suggested
DATA ON TOURISM IN AIR (1)

Number of arrivals of non-residents staying in hotels and similar accommodation establishments, 2012-2019 (2012=100)

Source: EUROSTAT
DATA ON TOURISM IN AIR (2)

Number of bed places in hotels and similar accommodation establishments, 2012-2019 (2012=100)

Source: EUROSTAT
DATA ON TOURISM IN AIR (3)

Number of nights spent in hotels and similar accommodation establishments, 2012-2019 (2012=100)

Source: EUROSTAT
## SUSTAINABLE TOURISM INDICATORS (MRS.ESPON) 2019

<table>
<thead>
<tr>
<th>Country</th>
<th>Tourism contribution to GDP</th>
<th>Jobs in tourism industries</th>
<th>Number of UNESCO World heritage sites</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greece</td>
<td>20,13%</td>
<td>25,30%</td>
<td>18</td>
</tr>
<tr>
<td>Croatia</td>
<td>25,75%</td>
<td>23,78%</td>
<td>10</td>
</tr>
<tr>
<td>Italy</td>
<td>13,11%</td>
<td>14,73%</td>
<td>55</td>
</tr>
<tr>
<td>Slovenia</td>
<td>12,25%</td>
<td>12,74%</td>
<td>4</td>
</tr>
<tr>
<td>Albania</td>
<td>26,27%</td>
<td>24,30%</td>
<td>4</td>
</tr>
<tr>
<td>Bosnia and Herzegovina</td>
<td>10,05%</td>
<td>11,72%</td>
<td>3</td>
</tr>
<tr>
<td>Montenegro</td>
<td>25,10%</td>
<td>19,74%</td>
<td>4</td>
</tr>
<tr>
<td>North Macedonia</td>
<td>6,95%</td>
<td>6,36%</td>
<td>1</td>
</tr>
<tr>
<td>Serbia</td>
<td>6,80%</td>
<td>4,75%</td>
<td>5</td>
</tr>
</tbody>
</table>

Source: MRS.ESPON
## PROJECTS IMPLEMENTED, 2019

<table>
<thead>
<tr>
<th>Programme</th>
<th>Number of projects analysed</th>
<th>Total budget in million EUR</th>
</tr>
</thead>
<tbody>
<tr>
<td>National and Regional OPs</td>
<td>148</td>
<td>EUR 461.98 million</td>
</tr>
<tr>
<td>ADRION Programme</td>
<td>22</td>
<td>EUR 18.66 million</td>
</tr>
<tr>
<td>Cross-border Cooperation Programmes</td>
<td>112</td>
<td>EUR 132.16 million</td>
</tr>
<tr>
<td>Interreg Mediterranean</td>
<td>21</td>
<td>EUR 56.75 million</td>
</tr>
<tr>
<td>LIFE Programme</td>
<td>3</td>
<td>EUR 4.86 million</td>
</tr>
<tr>
<td>HORIZON Programme</td>
<td>7</td>
<td>EUR 15.44 million</td>
</tr>
</tbody>
</table>
### TSG 4 MEETINGS (2015-2020)

<table>
<thead>
<tr>
<th>Meeting</th>
<th>Date</th>
<th>Place</th>
<th>Key themes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Meeting</td>
<td>12/13 March, 2015</td>
<td>Tirana, Albania</td>
<td>Introduction&lt;br&gt;Guidelines about what needed to be accomplished</td>
</tr>
<tr>
<td>2nd Meeting</td>
<td>29/30 June, 2015</td>
<td>Zagreb, Croatia</td>
<td>The TSG agreed to announce three &quot;common priorities&quot; to kick-off its activities</td>
</tr>
<tr>
<td>3rd Meeting</td>
<td>November, 2015</td>
<td>Zagreb, Croatia</td>
<td>Defining the top six priorities</td>
</tr>
<tr>
<td>4th Meeting</td>
<td>April, 2016</td>
<td>Ljubljana, Slovenia</td>
<td>IPA countries report</td>
</tr>
<tr>
<td>5th Meeting</td>
<td>17/18 November, 2016</td>
<td>Tirana, Albania</td>
<td>Working paper on labelling&lt;br&gt;Discussion on EU-China Tourism</td>
</tr>
<tr>
<td>6th Meeting</td>
<td>26 April, 2017</td>
<td>Zagreb, Croatia</td>
<td>Report on/analysis of the 8 national tourism strategies</td>
</tr>
<tr>
<td>7th Meeting</td>
<td>21 November, 2017</td>
<td>Palermo, Italy</td>
<td>Communication and distribution of all documents</td>
</tr>
<tr>
<td>8th Meeting</td>
<td>19/20 April, 2018</td>
<td>Zagreb, Croatia</td>
<td>Cooperation within the BLUE MED initiative</td>
</tr>
<tr>
<td>9th Meeting</td>
<td>13/14 November, 2018</td>
<td>Mali Lošinj, Croatia</td>
<td>Discussion on the labelling process on national level</td>
</tr>
<tr>
<td>10th Meeting</td>
<td>4/5 April, 2019</td>
<td>Podgorica, Montenegro</td>
<td>Issue concept proposal AdrionCycleTour</td>
</tr>
<tr>
<td>11th Meeting</td>
<td>20/21 November, 2019</td>
<td>Bari, Italy</td>
<td>Issue paper titled “Manual for participatory tourism connecting community and culture through storytelling”</td>
</tr>
<tr>
<td>12th Meeting</td>
<td>9 June, 2020</td>
<td>Online</td>
<td>Importance of harmonizing the activities of the EUSAIR Thematic Steering Group 4 - Sustainable Tourism with those of other macro-regional strategies</td>
</tr>
<tr>
<td>13th Meeting</td>
<td>6 October, 2020</td>
<td>Online</td>
<td>Slovenian chairmanship&lt;br&gt;Embedding TSG4 emblematic/flagship actions and projects into national/regional ESIF/IPA programming documents</td>
</tr>
</tbody>
</table>
THE WAY FORWARD

• Future activities through 5 flagships:
  • Development of the network of sustainable tourism businesses and clusters,
  • Research & Development for improvement of SME's performance and growth diversification,
  • Training and skills in the field of tourism business (vocational and entrepreneurial skills),
  • Expanding the tourist season to all-year round,
  • Development of sustainable and thematic cultural routes/Connecting cultural routes in EUSAIR'.
Thank you!