



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

## ***Monitoring and Evaluation Report***

***Iva Tolić Mandić***  
***November 11, 2022***



# INTRODUCTION

- The project includes three (3) main tasks:
  - Task T 3.1: Building the Knowledge Base relevant to Pillar 4 „Sustainable Tourism“,
    - EUSAIR relevant projects
    - EUSAIR research institutions and research studies relevant for identification of TSG4 key indicators
    - EUSAIR list of sustainable tourism networks (28 networks have been listed and described and web page links provided where available; 9 of them is still yet to be established), and
    - EUSAIR list of key group of stakeholders relevant for the TSG4 topic
  - Task T 3.2: Establishing the EUSAIR Monitoring and Evaluation Framework,
  - Task T 3.3: Capacity building for public authorities.

# Sustainable tourism

- Global Sustainable Tourism Council (GSTC): sustainable practices **in and by the tourism industry**. It is an aspiration to acknowledge all impacts of tourism, both positive and negative.
- UNEP & UNWTO: tourism that takes full account of its **current and future economic, social and environmental impacts**, addressing the needs of visitors, the industry, the environment and host communities
  - refers to the environmental, economic, and socio-cultural aspects of tourism development, and a **suitable balance** must be established between these three dimensions to guarantee its **long-term sustainability**

# Sustainable tourism in recent strategic documents

## A resolution on establishing an EU strategy for sustainable tourism (2021)

- COVID-19 pandemic has led to a shift in the nature of travellers' demands towards safe, clean and more sustainable tourism
- Sustainable tourism action plans at national and regional level should be devised and full use should be made of the Next Generation EU funds to finance the tourism transition action plans

## Transition Pathway for Tourism (2022)

- A plan jointly created with actors of the tourism ecosystem detailing key actions, targets and conditions to achieve **the green and digital transitions** and **long-term resilience of the sector**
- Implement measures in twenty-seven areas, including:
  - To invest in circularity to reduce energy, waste, water and pollution, and at the same time to better meet the increasing demand for sustainable tourism;
  - To enhance data sharing practices to allow for new innovative tourism services and improve the sustainable management of destinations;
  - To invest in skills to ensure the availability of qualified workforce and attractive careers in the ecosystem.

# MRSs and Sustainable tourism

Macro-regional strategies	EUSAIR	EUSBSR	EUSDR	EUSALP
Strategic objectives and priority areas	1. Blue Growth	1. Save the sea	1. Connecting the Danube region: - Promoting culture and tourism	1. Equal employment opportunities: - Increase the economic potential of strategic sectors
	2. Connecting the Region	2. Connect the region	2. Protecting the Environment	2. Sustainable internal and external accessibility
	3. Environmental Quality	3. Increase prosperity: - Innovations - Tourism – reinforcing cohesiveness of the macro-region through tourism.	3. Building prosperity	3. A more inclusive environment framework for all and renewable and reliable energy solutions for the future
	4. Sustainable tourism - diversified tourist offers - sustainable and responsible tourism management		4. Strengthening the region	
Horizontal Objectives	- research, innovation and SMEs - capacity building, including communication	- Capacity building - climate change - cooperation with neighbouring non-EU countries - spatial planning		

Description: Economy / Environment and energy / Transport and connectivity / Resilience / Tourism and Innovation

# EUSAIR Pillar 4 – Sustainable tourism

- Developing the sustainable and responsible tourism potential of the Adriatic-Ionian Region, through innovative and quality tourism products and services
- Promoting responsible tourism behaviour on the part of all stakeholders across the Region.
- The specific objectives for this pillar are (AP 2014):
  1. Diversification of the macro-region's tourism products and services along with tackling seasonality of inland, coastal and maritime tourism demand.
  2. Improving the quality and innovation of tourism offer and enhancing the sustainable and responsible tourism capacities of the tourism actors across the macro-region



# SWOT Analysis (2019)

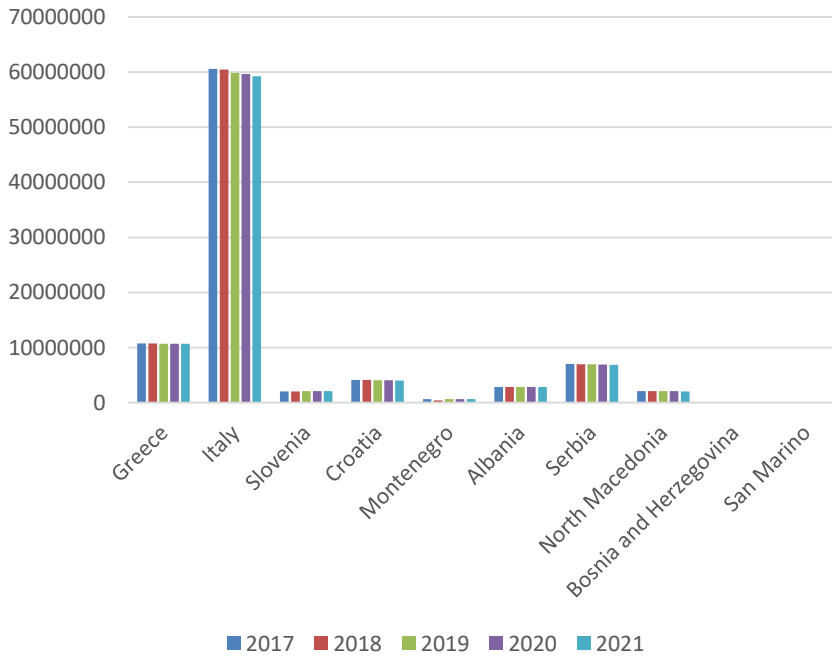
SUSTAINABLE TOURISM	
STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> <li>• Sustainable (green) competitive economic potential</li> <li>• Tourism as one of the fastest growing economic activities in the region and main GDP contributor</li> <li>• Rich cultural, historical, archaeological and natural heritage</li> <li>• Functional areas with joint characteristics</li> <li>• Knowledge on innovative tourism products and services such as cultural/creative industries</li> <li>• Critical mass of niches of excellence</li> <li>• Strong potential of nautical sector</li> <li>• Sustainable tourism brings vitality to local economy</li> <li>• Top quality attractions</li> <li>• Safe tourism destination</li> <li>• Slow tourism potential</li> </ul>	<ul style="list-style-type: none"> <li>• Rich natural, cultural, historic and archaeological heritage but not exploited in a sustainable and responsible way or not exploited at all</li> <li>• Inadequate knowledge and skills on sustainable tourism</li> <li>• Inadequate level of quality in tourism offer</li> <li>• Poor implementation of sustainable tourism development policies and responsible tourism concepts</li> <li>• Low level of stakeholders' involvement (local population, visitors)</li> <li>• Insufficient ecological awareness of tourism participants</li> <li>• Seasonality</li> <li>• Lack of common branding strategies of macro regional tourism potentials</li> <li>• Complex and not harmonized regulatory framework</li> <li>• Low level of diversification of the tourism offer</li> <li>• Low level of accessibility of attractions to the visitors with special access needs</li> <li>• Inconsistency in the quality of infrastructure</li> <li>• Low labour productivity</li> <li>• Insufficient entrepreneurial and managerial skills</li> <li>• Low innovation capacity</li> </ul>
OPPORTUNITIES	THREATS
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# EUSAIR Monitoring and Evaluation System

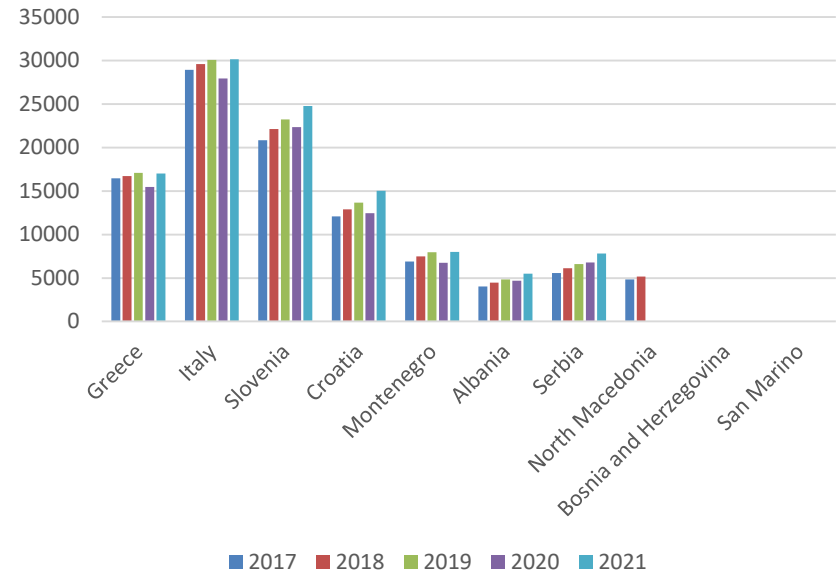
- **Socio-economic indicators** (8)
- **Context indicators** – context of the specific thematic areas covered by each Pillar (MRS.ESPON) (3)
- **Output indicators** measure what is directly produced/supplied through the implementation of the co-financed projects (3)
- **Result indicators** capture the expected effects on participants or entities brought about by a project (10)
- **Impact indicators** capture the effect of the co-financed interventions (2)
- **Governance indicators** (2)
- **Cross-pillar indicators** (3)



# Socio-economic indicators (1)

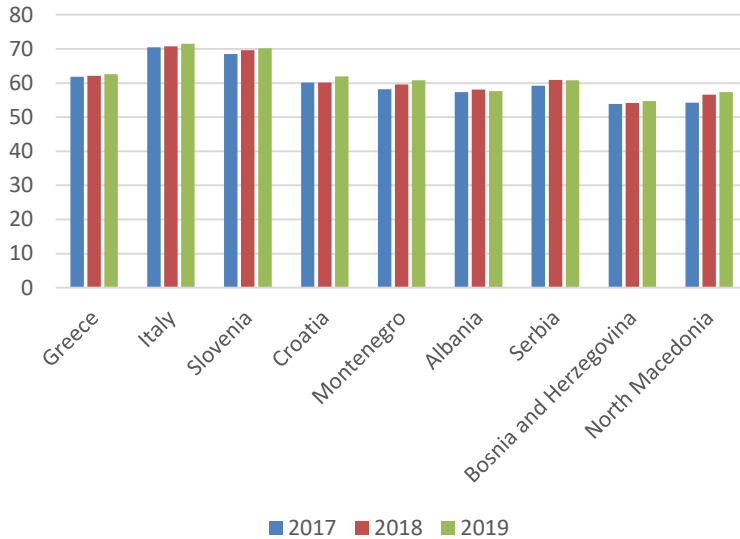


GDP p/c

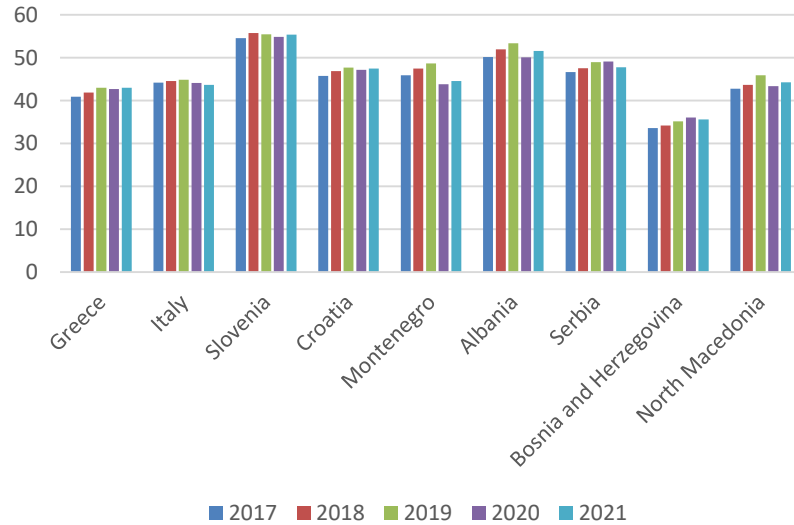


## Population

# Socio-economic indicators (2)

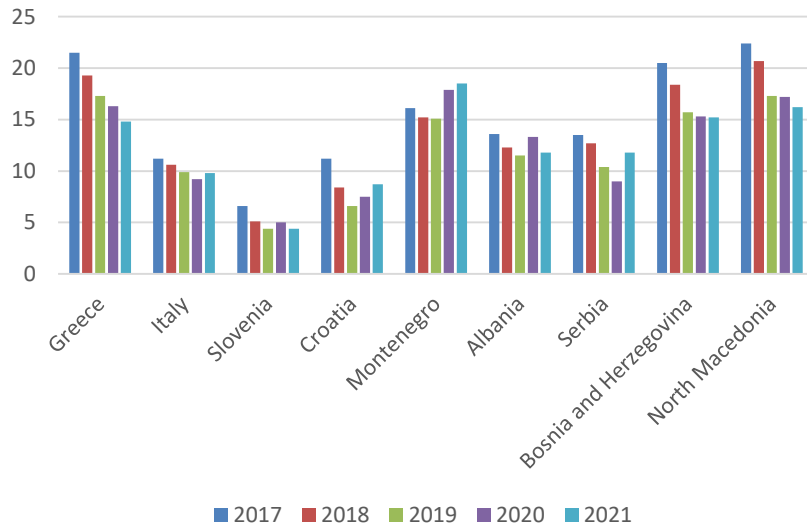


## Employment rate



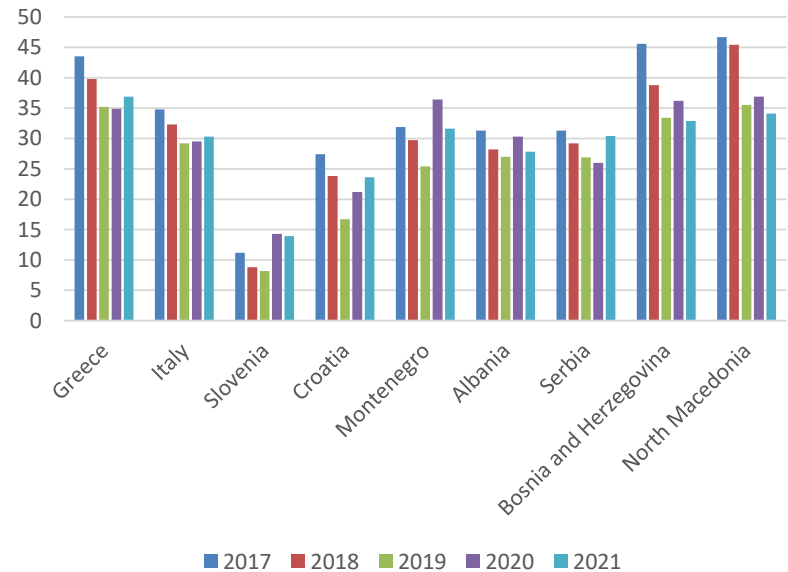
## Global Competitiveness Index

# Socio-economic indicators (3)

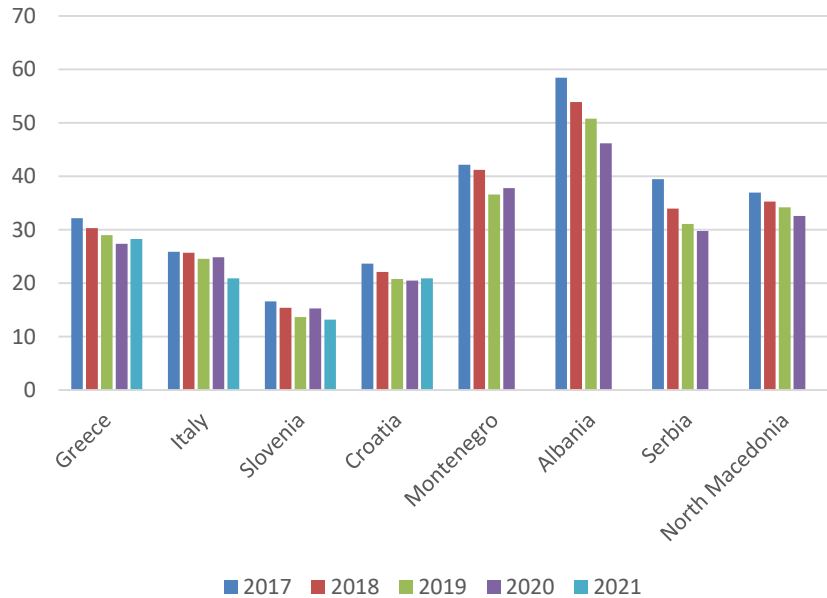


Unemployment rate

Youth unemployment rate

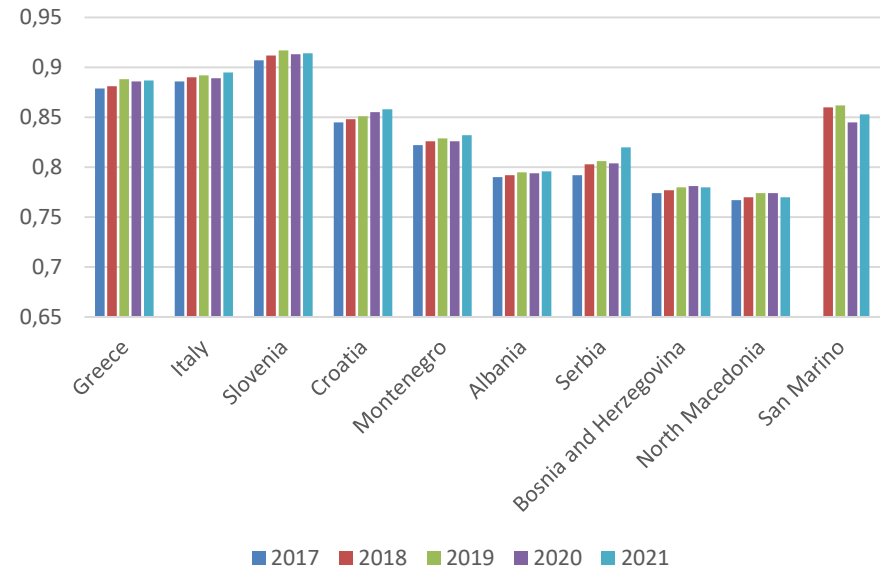


# Socio-economic indicators (4)

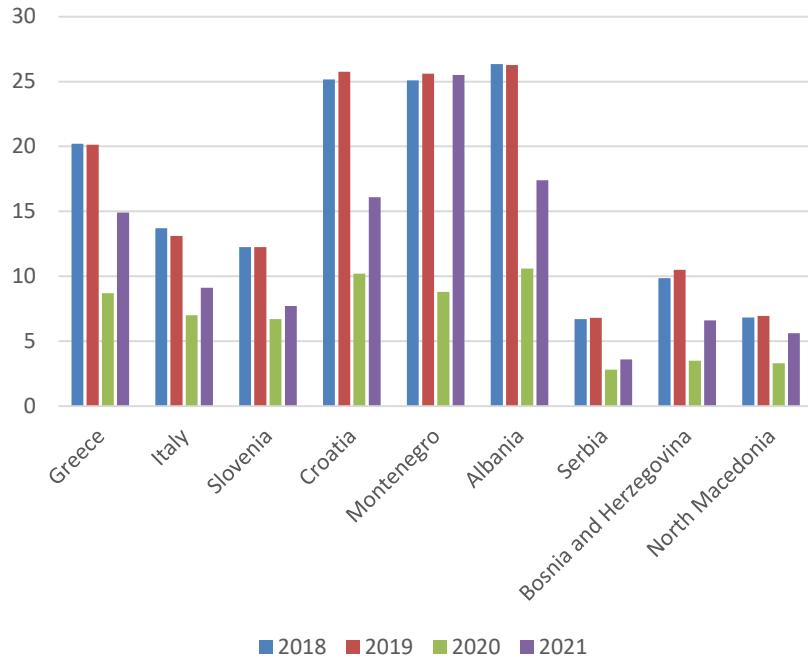


People at risk of poverty or social exclusion

## Human Development Index

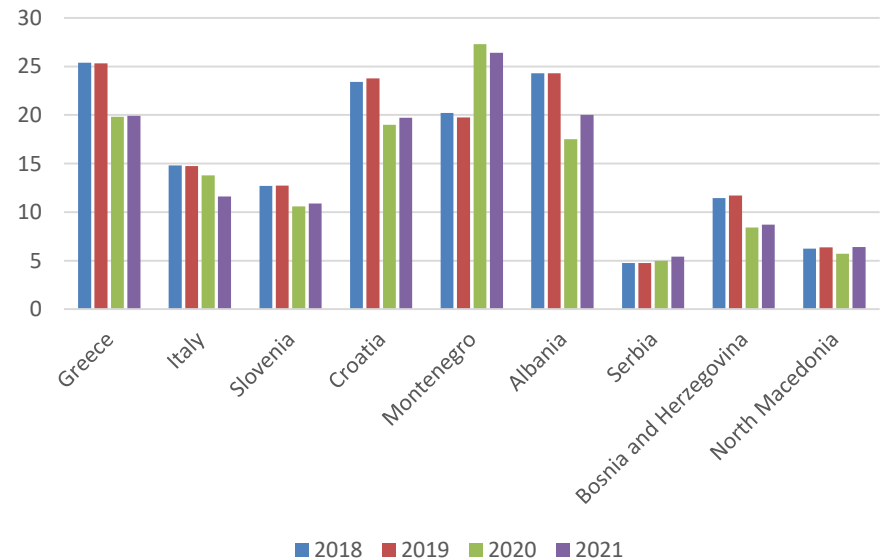


# Context indicators (MRS.ESPON) (1)



Tourism direct contribution to GDP

## Jobs in tourism industries



## Context indicators (2)

- UNESCO World Heritage Sites – **104** in 2018, **105** in 2019, **111** in 2021



Montecatini Terme, Italy



The works of Jože Plečnik in Ljubljana, Slovenia



Rajca, Albania

## Context indicators (3)



Padua's fourteenth-century fresco cycles



Janj Forest, Bosnia and Herzegovina



The Porticoes of Bologna, Italy

# Output indicators

## Interregional Investments 2014-2020

Programme	Number of projects analysed	Total budget in million EUR
National and Regional OPs	148	EUR 461,98 million
ADRION Programme	22	EUR 18,66 million
Cross-border Cooperation Programmes	112	EUR 132,16 million
Interreg Mediterranean	21	EUR 56,75 million
LIFE Programme	3	EUR 4,86 million
HORIZON Programme	7	EUR 15,44 million
<b>TOTAL</b>	<b>313</b>	<b>EUR 689,85 million</b>

## Projects introducing innovations

Programme	Projects introducing innovations
National and Regional OPs	6
ADRION Programme	16
Cross-border Cooperation Programmes	58
Interreg Mediterranean	6
LIFE Programme	0
HORIZON Programme	2
<b>TOTAL</b>	<b>88</b>

## Supported transnational networks

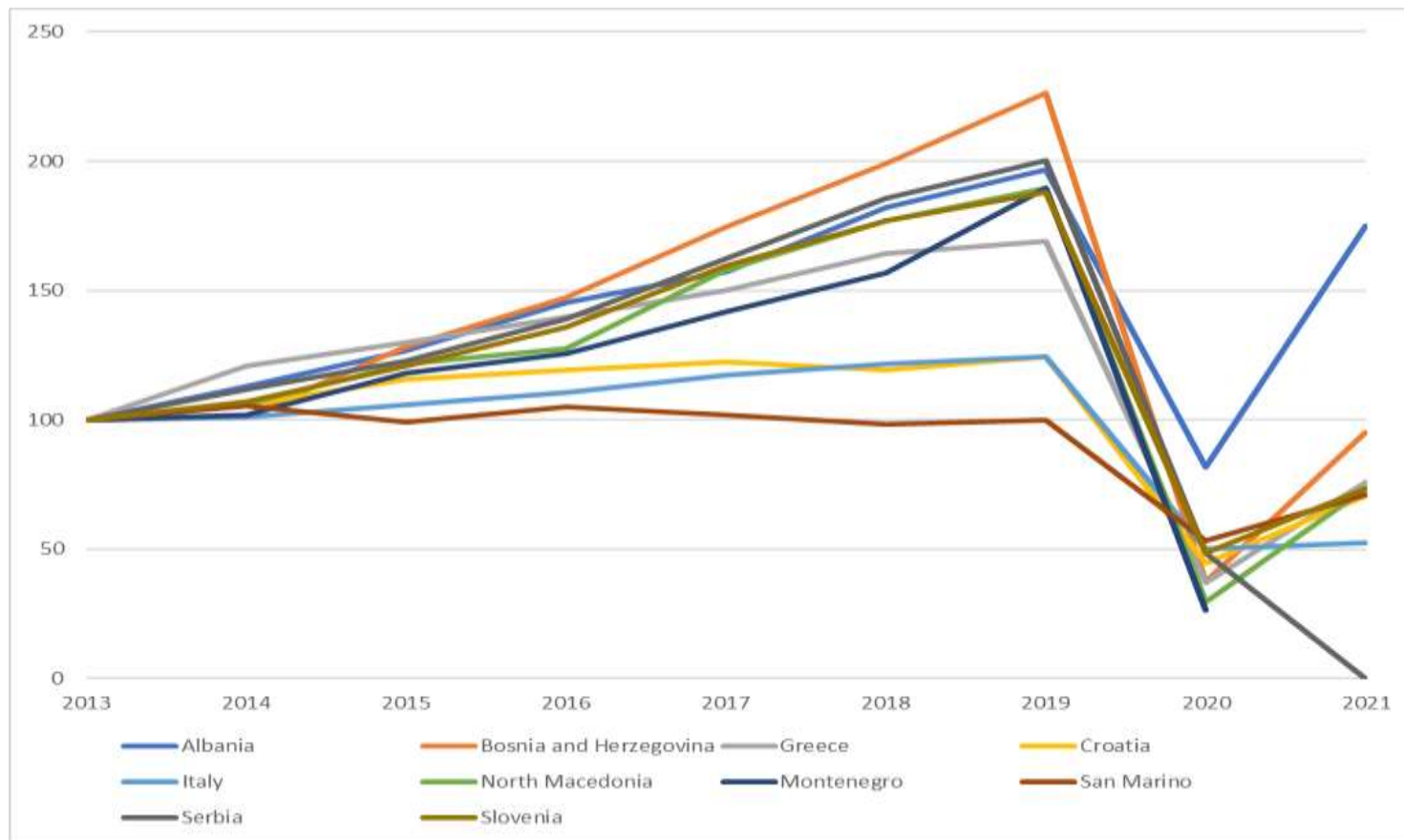
	2019	2020	2021
<b>EUSAIR</b>	18	18	18



REPUBLIKA HRVATSKA  
Ministarstvo  
turizma i sporta

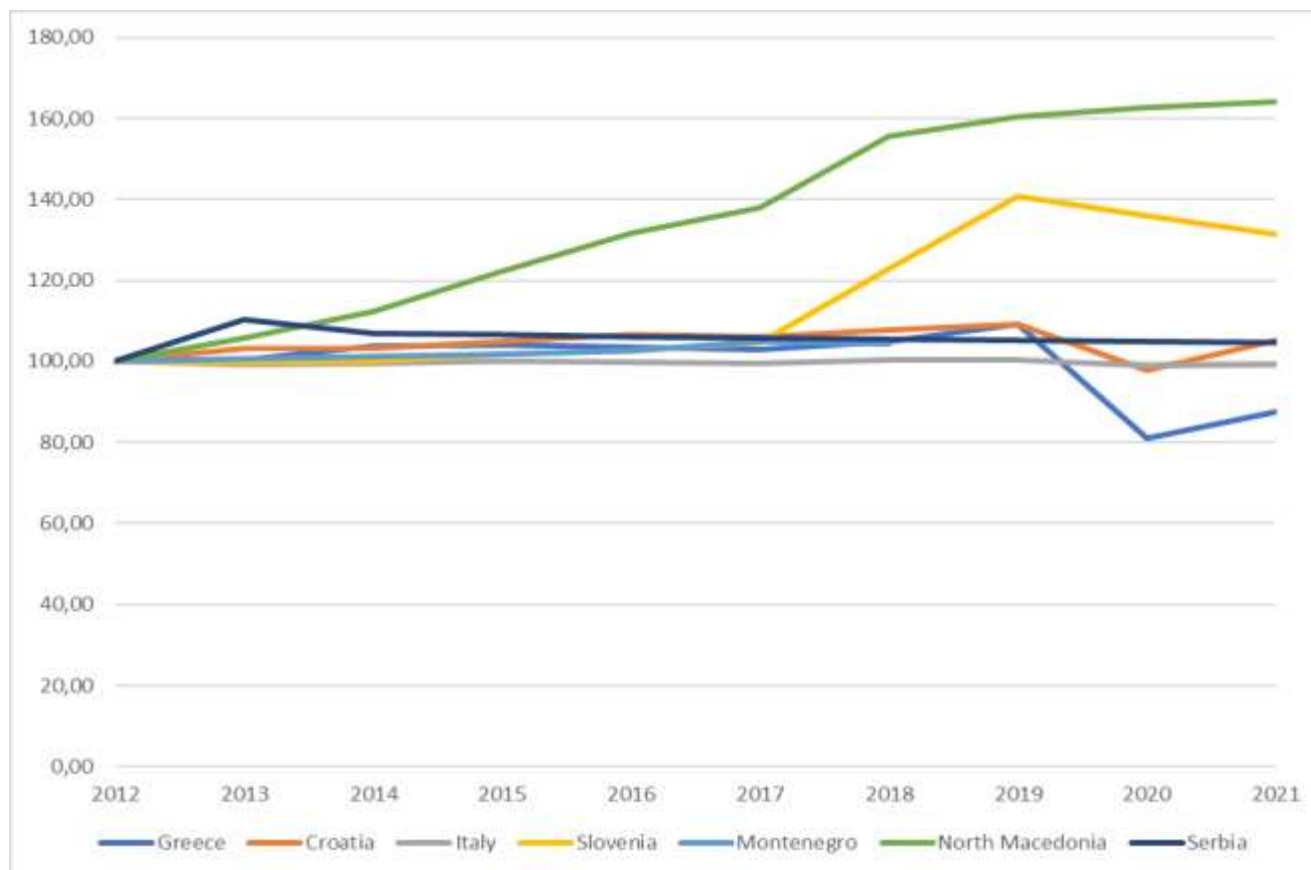


# Result indicators (1)



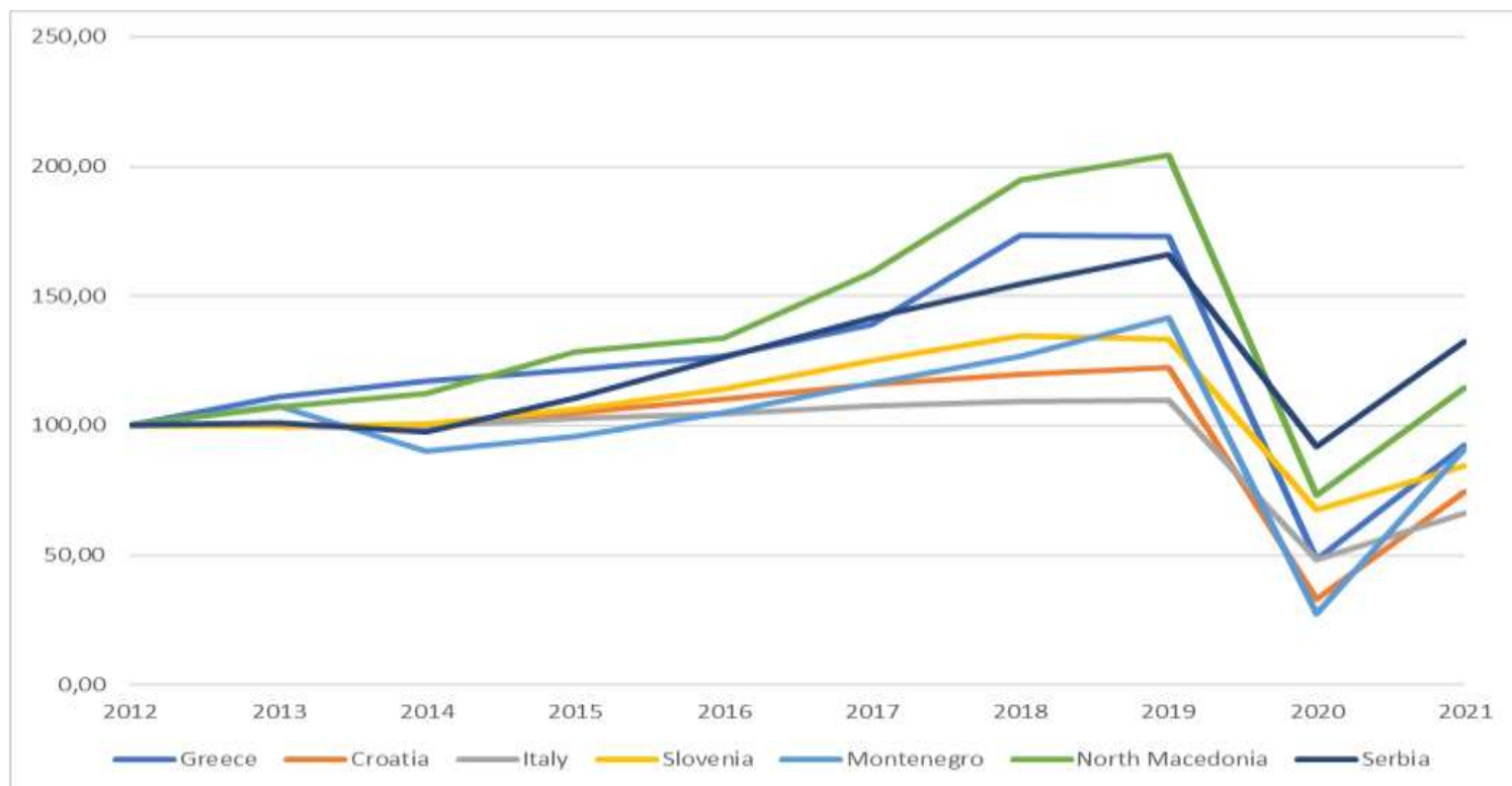
Number of arrivals, 2013=100

## Result indicators (2)



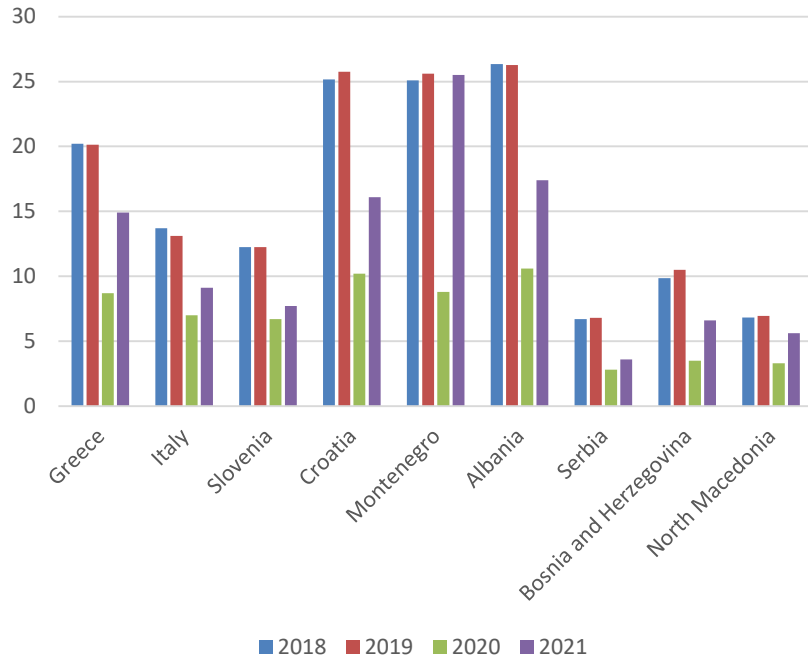
Number of bed places at hotels and similar accommodation establishments, 2012=100

## Result indicators (3)

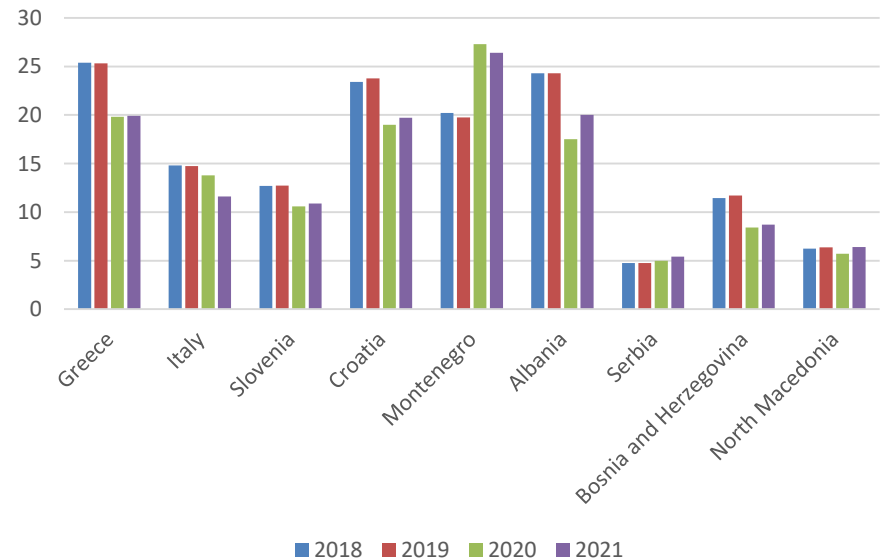


Number of nights spent at hotels and similar accommodation establishments, 2012=100

# Result indicators (4)

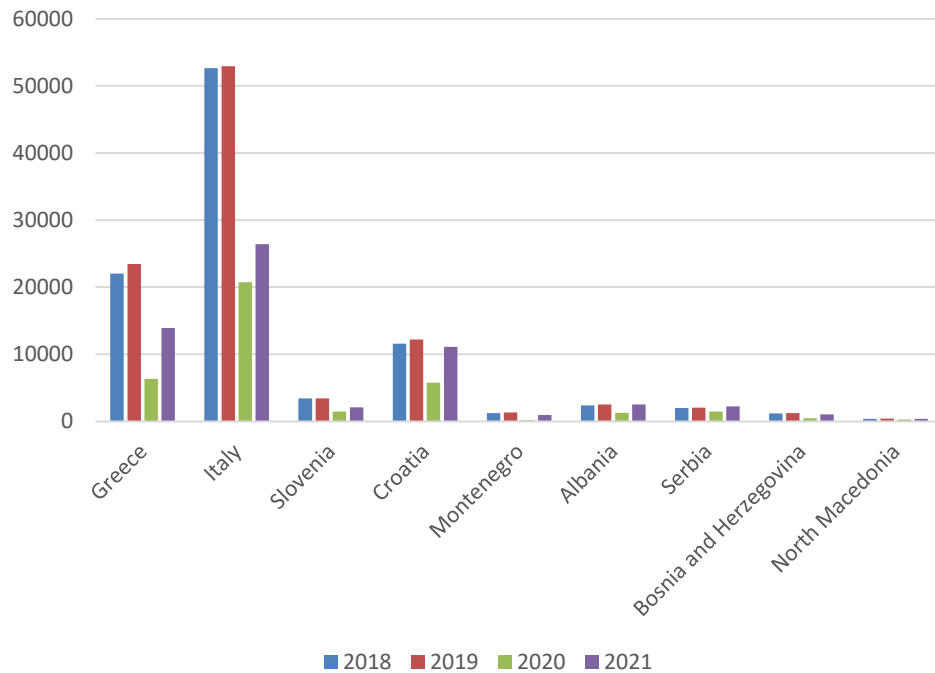


## Direct tourism employment as a percentage of total employment in the destination



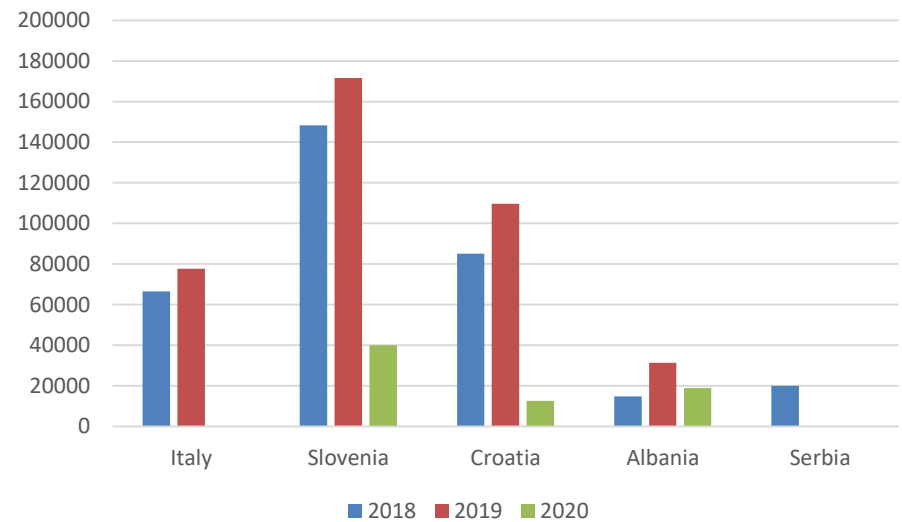
## Relative contribution of tourism to the destination's economy

# Result indicators (5)

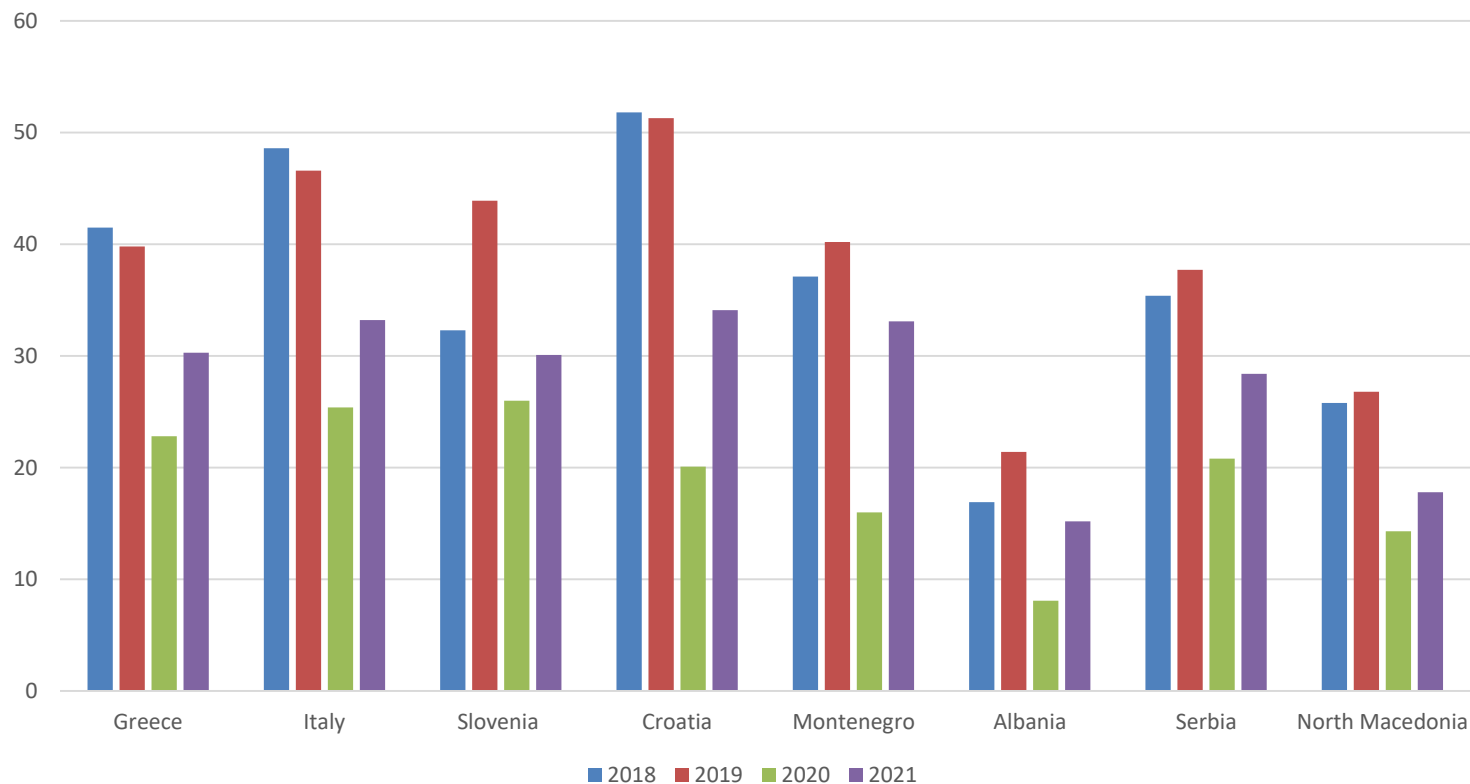


Total spending of overnight tourists, million EUR

Total spending of same-day visitors, 000 EUR



# Result indicators (6)



Occupancy rate at hotels and similar accommodation establishments

# Result indicators (7)

EUSAIR country	2019		2021	
	Travel & Tourism Development Index – Environmental Sustainability	Rank	Travel & Tourism Development Index – Environmental Sustainability	Rank
Greece (EL)	4.3	36	4.4	33
Italy (IT)	4.3	38	4.3	40
Slovenia (SI)	5.7	16	4.8	12
Croatia (HR)	4.5	25	4.5	25
Montenegro (ME)	4.0	60	4.0	64
Albania (AL)	4.3	40	4.4	27
Serbia (RS)	3.7	84	3.8	78
Bosnia and Herzegovina (BA)	3.4	111	3.5	105
North Macedonia (MK)	3.6	94	3.7	91
San Marino	-	-	-	-

# Impact indicators

- **Strategies and action plans developed** in the field of natural and cultural heritage and tourism – will be known after the OPs for following period are accepted
- Joint tourism products developed and promoted

Programme	Projects that develop and/or promote joint tourism products
ADRION Programme	10
Cross-border Cooperation Programmes	60
Interreg Mediterranean	3
LIFE Programme	0
HORIZON Programme	3
<b>TOTAL</b>	<b>76</b>



# Governance indicators

- Attendance of TSG 4 meetings and project ideas

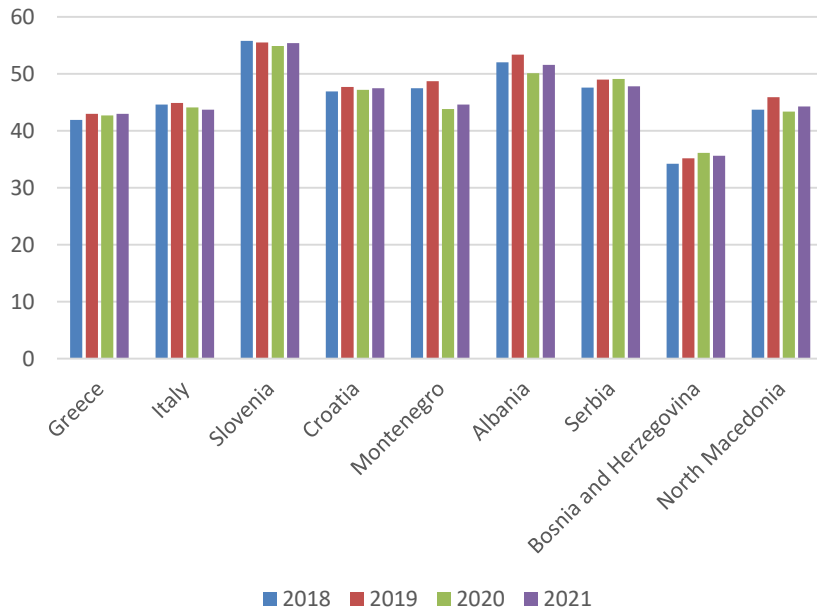
Meeting	Date	Place	Participants	Project ideas
1st Meeting	12/13 March, 2015	Tirana, Albania	7 out of 8 countries participated	0
2nd Meeting	29/30 June, 2015	Zagreb, Croatia	7 out of 8 countries participated	0
3rd Meeting	November, 2015	Zagreb, Croatia	All 8 countries participated	0
4th Meeting	April, 2016	Ljubljana, Slovenia	7 out of 8 countries participated	0
5th Meeting	17/18 November, 2016	Tirana, Albania	5 out of 8 countries participated	0
6th Meeting	26 April, 2017	Zagreb, Croatia	7 out of 8 countries participated	0
7th Meeting	21 November, 2017	Palermo, Italy	6 out of 8 countries participated	0
8th Meeting	19/20 April, 2018	Zagreb, Croatia	6 out of 8 countries participated	0
9th Meeting	13/14 November, 2018	Mali Lošinj, Croatia	7 out of 8 countries participated	0
10th Meeting	4/5 April, 2019	Podgorica, Montenegro	7 out of 8 countries participated	1
11th Meeting	20/21 November, 2019	Bari, Italy	6 out of 8 countries participated	0
12th Meeting	9 June, 2020	Online	All 9 countries participated	0
13th Meeting	6 October, 2020	Online	All 9 countries participated	0
14th Meeting	16 February, 2021	Online	All 9 countries participated	4
15th Meeting	20 April 2021	Online	All 9 countries participated	1
16th Meeting	5 October 2021	Online	All 9 countries participated	0
17th Meeting	5 May 2022	Online	All 10 countries participated	4
18th Meeting	18 October 2022	Thessaloniki, Greece	All 10 countries participated	0

# Cross-pillar indicators (1)

- Innovation effects

Country	2018	2019	2020	2021	Performance group
Greece	67.57	78.55	80.63	88.49	Moderate innovator
Italy	87.44	94.03	97.75	108.08	Moderate innovator
Slovenia	100.01	98.08	93.81	100.49	Moderate innovator
Croatia	62.02	64.65	68.31	78.22	Emerging innovator
Montenegro	53.14	54.91	50.86	53.74	Emerging innovator
Albania	-	-	-	-	-
Serbia	57.83	63.93	67.01	74.52	Emerging innovator
Bosnia and Herzegovina	44.97	43.16	38.72	38.97	Emerging innovator
North Macedonia	44.56	40.74	44.58	47.10	Emerging innovator
San Marino	-	-	-	-	-

# Cross-pillar indicators (2)



Supported transnational cooperation networks

	2019	2020	2021
<b>EUSAIR</b>	18	18	18

Employment rate

# SWOT Analysis (2022)

SUSTAINABLE TOURISM	
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# EUSR AP 2014 – main results

## Topic 1 – Diversified tourism offer (products and services)

- **5 new macro-regional routes created (through the implementation of EU funded projects in the AIR)**
  - ROUTES4YOU – **eight Macro-regional routes** have been created, related to origin of the humanity in Europe, heritage, civilisation, life, knowledge, design and nature.
- **Accessibility of hotels and museums has also been an objective of several projects implemented in the Region.**
  - TOURISM4ALL financed under Interreg ADRIION
  - development and a wide **cross border network of accessible** tourist destinations with natural and cultural heritage
  - Promotion of social inclusion
  - **joint-promoting tourism services** for disadvantaged people and for those with special accessibility needs (e.g. the disabled, the elderly)

## Topic 2 – Sustainable and responsible tourism management (innovation and quality)

- 50% increase in tourist arrivals from countries outside the Region in the period 2014-2019
  - All of the EUSAIR countries data are available for – number of tourists from outside of the region was above 50%, except for Italy where the increase was 30%.
  - The whole Region show that the increase in the number of arrivals from outside a region is 44% - **almost achieved**.
- 50% increase in tourism arrivals during the off-season period (from January to April and from October to December)
  - During the analysed period from 2014-2019, the number of arrivals of tourists during the off-season period increased by more than 50% in all of the AIR countries except for Italy where it increased for 26% - **achieved**.

# Conclusion (1)

- COVID-19 pandemic
- Most of the **indicator values decreased but started to recover in 2021**
- **The socio-economic indicators** showed that the population at the AIR was increasing in the period 2017-2021, while economic indicators – GDP p/c, unemployment rate, youth unemployment rate and jobs in tourism industries were decreasing in 2020. Some of them started to recover in 2021.
- Sustainable tourism **output indicators** did not change in the previous period, since the new OPs are being developed so there were no new projects.
- Sustainable tourism **result indicators** showed decrease in 2020 compared to the period 2017-2019, but also a recover in 2021. All of the result indicators declined in 2020 – number of arrivals, number of bed places in hotels and similar accommodation establishments, number of nights spent in hotels and similar accommodation establishments, relative contribution of tourism to the destination's economy, spending of same day visitors, average occupancy rate in commercial accommodation establishments and direct tourism employment as a percentage of total employment in the destination and began to recover in 2021. However, they are still not on the pre-pandemic level.
- Sustainable tourism **impact indicators**, as well as the governance and cross-pillar indicators have not showed any change compared to the previous annual monitoring report.

## Conclusion (2)

- **The COVID pandemic** helped to change the way tourism is experienced. It is recognized that, among other sectors, tourism has to be more sustainable.
- The EUSAIR Action Plan from under revision – **are lessons learned?**
- Only EUSAIR has sustainable tourism as one of the key Pillars
- Important that the **other macro - regions also recognize** the importance of sustainable tourism as a framework for sustainable growth in the future.



# Thank you!

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