

EUSAIR Thematic Steering Group for Pillar 4

Sustainable Tourism

Desk research report on stakeholder analysis and inventory of tourism resources

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I. Introduction

The Institute for Tourism was contracted by the Ministry of Tourism of the Republic of Croatia to assist the EUSAIR Thematic Steering Group for Pillar 4 – Sustainable Tourism. This was undertaken by conducting a survey of stakeholders and a desktop study of the available resources for sustainable tourism in the Adriatic Ionian Region (AIR). The Monitoring and Evaluation Concept was presented and discussed at the 9th Thematic Steering Group of the Pillar IV (TSG4) meeting on the 14th November 2018, Lošinj, Croatia. The tasks undertaken were based on the description extracted from the draft TOR document¹:

1. 'The Monitoring and Evaluation (M&E) TSG Expert will start with the identification and, where possible, the quantification of the existing situation. The collection of reliable and, as far as possible, comparable data for the whole of the European Union Strategy for the Adriatic Ionian (EUSAIR) macroregion';
2. 'EUSAIR stakeholders will be invited by the TSG, to share information on conducted research, studies and analyses (existing situation, SWOT analyses, all available quantitative information that can be used for the formulation of indicators, base lines, targets etc.)';
3. 'The aim is to extract useful information regarding the existing situation (in the thematic sector(s) covered by the TSG) that will enable the (pillar related) study covering:
 - a. The identification and filling of knowledge gaps (missing indicators or baseline values etc.);
 - b. The identification of particular studies or research could be fruitfully undertaken to further clarify the existing situation in certain thematic and/or geographical areas'.

The methodology used in this work included an assessment survey, desk research, stakeholder analysis and the assessment of the available resources in relation to the above bullet points within the EUSAIR context. Based on feedback from the TSG4 the 'Monitoring and Evaluation Questionnaire' was designed and distributed to the members. By December 20th 2018, feedback was received from seven out of the

¹ Monitoring and evaluation of the EUSAIR, Revised terms of reference, special service for strategy, planning and evaluation (EYSSA) national coordination authority of the NSRF Ministry Of Economy And Development Greece (lead partner for work package 3) March 2018



eight countries. Italy was not able to submit the answers as initially planned and have submitted part of the answers in May 2019.

The findings of the survey are presented below. This is then followed by the overview of the relevant programmes, projects, and institutions that were considered to have existing or potential correlations with the aims of the EUSAIR TSG4. Finally, this document presents a synthesis of findings from the study and reflects upon both the gaps and potential future activities required to clarify the current and future status of sustainable tourism in the EUSAIR.

The authors of this report thank the TSG4 representatives for their valuable input and recognize their efforts to confront the existing challenges and make progress on sustainable tourism within the EUSAIR. The information and views set out in this report are those of the authors and do not necessarily reflect the official opinion of the funding organisation. Neither the TSG4 of the EUSAIR nor any person acting on their behalf may be held responsible for the use which may be made of the information contained therein.

II. Stakeholders and resource analysis

The Adriatic-Ionian Region (AIR) country members face diverse challenges and have different levels of tourism development. These range from: established and mature, dynamic and expanding, and those in initial or early stages of development. This explains the wide spectrum of challenges, approaches, understandings and commitments to sustainable tourism as outlined in the answers provided for 'TSG 4 Monitoring and Evaluation Questionnaire'.

Strategic positioning of the Adriatic Ionian Region countries

All of the countries strive to accomplish global attractiveness and recognition aimed at developing all-year round tourism, entailing attracting new investment and subsequently more employment. The emphasis is on high-quality, authentic, green, diverse and sustainable tourism. In order to achieve this, but also other strategic goals, tools and strategies are considered that will increase tourism flows and expenditure, upgrade/ensure the quality (greening) of tourism products and services, improve accommodation and tourism education and attract investment. The results of the survey demonstrate a high level of awareness of the main internal problems that currently block the further development of sustainable tourism. These include high seasonality of tourism activity, poor infrastructure and/or accommodation quality, regional differences (administrational, level of development) a lack of investment, a strong grey economy, a lack of adequate marketing strategies, unsustainable use of natural resources and legislative issues, among other problems. Sustainable tourism development is primarily seen as a means for employment and investment that will, in time, result in a higher quality of life for the local population.

Bosnia & Herzegovina stands out as the country that has a large number of obstacles to overcome on their way to establish a fully functioning system. Namely, the need to alter the awareness of the potential of tourism among all stakeholders and strategically position tourism development, raise the reputation and image of the Federation itself, solve the problem of the grey economy, put higher emphasis on nature

protection and conservation, and improve (tourism) infrastructure. Conversely, Slovenia is emphasizing 'green' tourism in its main development strategy (in the vision and among the main goals) and the related challenges of its credible top down implementation (more in the challenges section). This illustrates the array of stages and related challenges that confront the AIR countries.

The key challenges for sustainable tourism development in the AIR countries are:

- Establishing an effective and coordinated monitoring and evaluation of policy and strategy;
- Effectively exploiting the green (sustainable) competitive economic potential.

In relation to the sustainability implementation:

- Shift the current focus from mainstream tourism to special interest markets.
- Monitoring sustainability goals and poor administration capacities.

Use of innovation in tourism product development:

- Diversification of the tourism offer;
- Infrastructure improvement.

In relation to the quality of the tourism offer:

- Developing Information and communication technology (ICT);
- Combating seasonality;
- Promoting local community prosperity and quality of life;
- Conserving and valuing natural and cultural heritage;
- Improving employment and education in tourism; and,
- Resolving the regulatory burden and bureaucracy.

In Greece, the main challenge is the lack of a coherent and coordinated monitoring and evaluation policy for the implementation of a tourism strategy based upon sustainability principles. While in Bosnia & Herzegovina the basic prerequisites for the strategic delivery of tourism has yet to be developed (obstacles in relation to 'the approval of the laws at the level of the entities and their harmonization at the state level, as well as the development of strategic documents, action plans and master plans'). As the only country stressing 'green' tourism in its strategic goals, Slovenia recognizes the need to close the gaps between the green promise (promotion of tourism) and green quality – i.e. 'Green washing'.

When asked how to meet the challenges, countries have rarely been giving straight solutions and/or actions. Some of the recognized approaches to resolve the main challenges are:

- Improve the perception of the tourism sector as a career opportunity;
- Promote vocational education and centres of excellence;
- Enhance employer awareness about the benefits of employee training by better co-operation between academia, government and the private sector (Science-Policy-Society Interface);
- Increase the overall awareness of policy makers on tourism impacts and tourism importance for the economy;
- Increase the environmental consciousness of all stakeholders;
- Develop adequate tourism development strategies based on relevant, reliable and up-to-date market research;
- Harmonize the relationship between economic, ecological and social needs;
- Support the development of tourism products focused on special interest tourism market, out-of-season periods and regions with lower levels of tourist activity;
- Promote investment opportunities;
- Support ICT, digitalization, virtual reality and innovative approaches in all dimensions of tourist offer;
- Identify local long term benefits from tourism;
- Enhance monitoring and evaluation mechanisms (assess and manage carrying capacity of the area, define, measure and monitor sustainability indicators).
- Improving efficiency of public administration.

In Bosnia & Herzegovina, the importance of tourism for the economic and social development of the country is yet to be recognized. There is a need to enhance cooperation between the government, academia and the private sector, and establish a tourism development strategy based on market research. Being aware of 'green washing' challenges, Slovenia stresses that sustainable development is not an isolated or independent sub-strategy or policy, but a concept to be enforced in all sub-strategies and policies, not only spatial, natural and cultural resources.

When observing short-term quantitative strategic goals, there are similarities among Croatia, Slovenia and Serbia. The key is to increase: arrivals / overnights, accommodation capacity, investment, workforce skills, tourist expenditure, and tourism revenues. Greece, similarly, narrows the quantitative goals on number of arrivals and tourism receipts. Albania uses direct contribution of tourism to gross domestic product to set its quantitative goal. There is no formulation of goals that relate to other aspects of sustainability (heritage, environment, local community, etc.). Qualitative goals are mainly linked to broad concepts such as attractiveness, competitiveness, and uniqueness of a country tourism product. Bosnia & Herzegovina links its development goals to the prerequisites of tourism development – adoption of tourism and hospitality laws, adoption of tourism development strategic documents, and creation of adequate workforce in tourism and hospitality sector. Greece is the only country that mentions sustainability indicators (i.e. ETIS/INSTO). Long-term goals are elaborated to a much lesser extent. Italy did not provide any answers in relation to its tourism goals/targets.

Monitoring and indicator use and development

Survey results show that Croatia and Albania are the only two countries that have a formal revision and/or monitoring process as part of the implementation of their national tourism strategy. Likewise, Montenegro and Bosnia & Herzegovina (within the Republic of Srpska only) have declared partial monitoring. This indicates that there is a crucial point of policy efficiency and an opportunity to work on the system that would help monitor at a strategic level.

On a national level, tourism indicators that are most consistently monitored, in almost all countries, are (Table 1):

- The capacity and the structure of commercial accommodation facilities (number of rooms/number of beds in hotels, campsites etc.);
- The number of arrivals and overnights at commercial accommodation facilities (both yearly and monthly data);
- The gross annual occupancy rate in commercial accommodation; and,
- Direct tourism employment as percentage of total employment.

Conversely, the tourism indicators that are NOT being monitored consistently are:

- The number of arrivals and overnights at non-commercial accommodation facilities (second homes, visiting friends and relatives), both monthly and yearly data;
- Percentage of tourists who are satisfied with overall experience;
- Percentage of repeat/return tourists;
- Percentage of residents who are satisfied with tourism;
- Percentage of tourism enterprises using voluntary certification/labelling for environmental corporate social responsibility (CSR); and
- Environmental indicators (daily energy & water consumption and waste production).

On the NUTS 2 level, the most important tourism indicator is the percentage of tourists who are satisfied with their overall experience. While the least important tourism indicator is the percentage of tourism enterprises using voluntary certification/labelling for environmental CSR.

On the NUTS 3 level, the most important tourism indicators are the capacity and structure of commercial accommodation facilities (number of rooms/number of beds in hotels, camp sites etc.), the number of arrivals and overnights at commercial accommodation facilities, both monthly and yearly data, the number of arrivals and overnights at non-commercial accommodation facilities (second homes, visiting friends and relatives), and the gross annual occupancy rate in commercial accommodation.

It is clear that all indicators are significantly less frequently monitored, measured or used on NUTS2 and NUTS3 level in comparison to national level. This lack of local / destination level monitoring is one of the significant challenges in achieving tourism sustainability. Also some of the “yes” claims should be clarified/verified.

Table 1: Tourism indicators monitored on the national, NUTS 2 and NUTS 3 levels

Legend: 1 Yes 2 Partially 3 No

Tourism indicators	Croatia			Greece			Slovenia			Albania			B&H			Montenegro			Serbia			Italy				
	National	NUTS 2	NUTS 3	National	NUTS 2	NUTS 3	National	NUTS 2	NUTS 3	National	NUTS 2	NUTS 3														
Capacity and structure of commercial accommodation (no. of rooms/beds in hotels, camp sites etc.)	1	1	1	1	1	1	1			2			3	2		1			1	2					1	1
Number of arrivals and overnights at commercial accommodation facilities	1	1	1	1	1	1	1			2				2		1			1	2		2			1	1
Yearly data	1	1	1	1	1	1	1			1			2			1			1	2		1	1		1	1
Monthly data	1	1	1	1	1	1	1			1			2			1			1						1	1
Number of arrivals/overnights at non-commercial accommodation (2nd homes, visiting friends/relatives)	2	2	2	3	3	3				2			3			2			2						2	2
Yearly data	2	2	2	3	3	3				1			2			2			2						2	2
Monthly data	2	2	2	3	3	3				1			3			3			2						3	2
Gross annual occupancy rate in commercial accommodation	1	1	1	1	1	1				3	3	3	2	1		1			2			1	1		1	1
Percentage of tourists who are satisfied with overall experience	3	2	2	3	3	3				3	3	3	2			1			3						2	2
Percentage of repeat/return tourists	3	2	2	3	3	3				3	3	3	3			1			3						2	2

Daily spending per tourist overnight	3	2	2	1	1	1	1		1			2	1		3			2	2
Direct tourism employment as percentage of total employment	1	2	2	1	1	1	1		1			2	2	1	3		1	2	2
Number of tourist nights per 100 residents	1	1	1	3	3	3	1		3	3	3	3	3		2			2	2
Percentage of residents who are satisfied with tourism	1	1	2	3	3	3	3		3	3	3		3		3			2	2
Percentage of tourism enterprises using voluntary certification/labelling for env. CSR	3	3	3	3	3	3	2		3	3	3	3	3		3			2	2
Daily energy consumption (per tourist compared to a resident)	2	2	2	3	3	3	3		3	3	3	3	3		3			1	1
Daily water consumption (per tourist compared to a resident)	2	2	2	3	3	3	1		3	3	3	3	3		3			1	1
Daily waste production (per tourist compared to a resident)	2	2	2	3	3	3	1		3	3	3	3	3		3			1	1

Table 1 illustrates the level of implementation of the different indicators and thus an opportunity for closer cooperation in sharing experiences that could ultimately lead to shared methodologies and approaches, which could in turn ensure comparability.

The majority of countries conduct visitor surveys (surveys on visitors characteristics, consumption, satisfaction, motivation, etc.) to inform tourism sustainability (Table 2). It is clear that non-economic variables of sustainability are underrepresented. Hence local community surveys, carrying capacity studies, environmental impact assessments and ecological footprinting are only being partially produced (some of the “yes” claims should be clarified/verified). Potentially, systematic approaches to destination sustainability issues, such as ETIS and INSTO, can play an overarching role.

Table 2: Studies and research being produced / conducted to inform tourism sustainability

Legend: 1 Yes 2 Partially 3 No 4 Don't know

Studies / research	Croatia	Greece	Italy	Slovenia	Albania	B&H	Montenegro	Serbia
TSA - Tourism Satellite Account for estimation of direct impact of tourism on GDP	1	3	1	1	3	3	4	3
Visitor surveys (on visitors characteristics, consumption, satisfaction, motivation, etc.)	1	1	1	1	3	2	1	2
Local community surveys (satisfaction with tourism development)	1	4	1		3	2	1	3
ETIS / INSTO indicators of sustainable tourism development	1	4	1	1	3	3	4	3
Carrying capacity studies	2	4	1	2	3	2	1	3
Environmental Impact Assessments	2	4	2	2	3	2	2	3
Tourism Ecological Footprinting (water, energy, spatial consumption, waste, wastewater, air emissions, etc.)	2	4	3	4	3	3	1	3

The majority of existing Destination Management Organizations (DMOs) participate primarily in tourism promotion and, to a degree, in tourism planning and monitoring systems of tourist satisfaction, motivation and spending (Table 3). DMOs should participate more in spatial and physical planning processes and gain more knowledge in topics pertaining to nature/cultural heritage conservation and environmental/health risks. In short, there is a significant room for enhancement of the role of DMOs and their capabilities.

Table 3: Destination management organization cover or participate sustainability related activities, planning and management processes.

Legend: 0 not applies 1 applies

DMO cover / participate in:	Croatia	Greece	Slovenia	Albania	B&H	Montenegro	Serbia	Croatia
tourism promotion	1	1	1	1	1	1	0	1
tourism planning	1	1	1	0	0	0	0	1
monitoring systems of tourist's satisfaction, motivation, spending	1	0	0	0	1	1	0	1
spatial and physical planning processes	1	0	0	0	0	0	0	1
local community satisfaction with tourism	1	1	0	0	0	0	0	1
nature and heritage conservation management	1	1	1	0	0	0	0	1
environmental/health risks and mitigation	1	0	0	0	0	0	0	1

All countries show a familiarity with sustainability systems and initiatives and this represents an opportunity to build upon existing systems (Table 4). Slovenia, Serbia and Bosnia & Herzegovina did not provide any lists of the related destinations, so accessibility to this data should be considered as an important next step. More specifically:

- Six out of seven countries participate in Europarc;
- Five countries participate in MedPan²;
- Four out of seven countries participate in EDEN destinations and apply ETIS - European Tourism Indicators System for sustainable destination management;
- Three out of seven countries participate in EU Ecolabel EMAS and Tourism 2030 Destinet services / green travel maps for destinations.

² the network of Marine Protected Areas managers in the Mediterranean <http://medpan.org/>

Table 4: Participation of in destinations/institutions in the selected sustainability systems and initiatives
 Legend: 1 Yes 2 No 3 Don't no

Sustainability systems and initiatives	Croatia	Greece	Italy	Slovenia	Albania	B&H	Montenegro	Serbia
EDEN destinations	1	1	1	1	2	2	2	1
ETIS	1	1	1	1	2	2	1	2
EU Ecolabel EMAS	3	1	3	1	2	2	1	2
Europarc	1	1	3	1	1	1	1	2
MedPAN	1	1	3	1	1	2	1	2
Tourism 2030 Destinet services / green travel maps for destinations	1	1	3	3	2	2	1	2

Almost all types of research/studies for monitoring tourism strategies are considered as equally important by the countries (Table 5). A slightly higher level of importance should be placed upon of studies that would instigate/improve/expand an indicator system for sustainable tourism and visitor satisfaction, and monitor spending and motivation. A slightly lower level of importance should be placed on studies mapping key sustainable tourism elements in each country (i.e. ESPON Targeted Analyses). This clearly highlights that more focus should be placed on monitoring tools to make further progress in developing sustainable tourism.

Table 5: Importance of research/studies for monitoring your tourism strategy

Legend: Scale 1 (least important) - 10 (most important)

		Croatia	Greece	Italy	Slovenia	Albania	B&H	Montenegro	Serbia
1.	Mapping key sustainable tourism elements in your country (i.e. ESPON Targeted Analyses)	8	9	8	9	10	10	9	9
2.	Studies that would set up/improve/expand an indicator system for sustainable tourism	10	9	9	9	10	10	10	9
3.	Local community tourism satisfaction/irritation research	10	9	10	9	9	9	9	10
4.	Visitor satisfaction, spending, motivation research	10	9	10	8	9	10	10	10
5.	Carrying capacity, crowding, overtourism in protected areas research	10	9	10	8	9	9	10	10

Attractions, stakeholders, products

All of the countries that filled the survey have provided relevant information on attractions of national and international importance (Table 6). This demonstrates the potential to map key tourism attractions in the AIR. Databases of UNESCO sites, museums, archaeological sites/parks, festivals/cultural events should be made accessible on one platform in order to foster cooperation across countries and regions.

For key attractions of international and national importance, ticket sales are the main source of data in all countries, followed by the visitor satisfaction and crowding (as perceived by either locals and/or tourists). Attractions that make enough revenue from ticket sales (i.e. can afford) could be informed and assisted to apply wider scope of sustainability topics in their assessments and surveying. This area represents the field of potential cooperation to standardize approaches, quality and statistical precision / credibility.

Table 6: indicators following for key attractions of international³ and national importance

Legend: 1 Yes 2 No 3 Don't know

Indicators for attractions	Croatia	Greece	Italy	Slovenia	Albania	B&H	Montenegro	Serbia
tickets sold	1	1	1	1	1	1	1	1
visitor satisfaction	1	3	1	3	2	1	2	3
visitor crowding	1	3	3	3	3	1	1	1
satisfaction of local community	3	3	1	3	2	2	2	1
environmental pressure (waste, water ...)	3	3	1	3	2	0	2	1

The information provided in the questionnaire on the key tourism stakeholders and assets (Italy did not provide any input) is limited and requires expansion. Also, more information on education systems, consultancies and professional associations / guilds would be beneficial, especially from Slovenia, and Serbia. Generally, there is a noticeable need to create a database and interactive platform of tourism

³ attractions that are internationally recognized and are main tourist motivators (pull factors)

stakeholder and assets – since it is a building block for long-term cooperation between the countries of the AIR. Regarding the key tourism stakeholders, all countries have national and regional tourism boards, except Bosnia & Herzegovina and Albania. Bosnia & Herzegovina have regional tourism boards only, while Albania only has a national tourism board. The number of educational institutions/international tourism programmes, tourism research institutions, consultancies and professional guild are generally at the tourism development stage. The analysis would benefit from more data on tourism stakeholders for Italy (no input) Serbia and Slovenia, in order to be able to consistently map all the stakeholders across the EUSAIR countries. Regarding the key tourism product, ‘sun and sea’ is the most important for most of the countries (Albania, Croatia, Greece, and Montenegro) - Italy did not provide any input.

The ‘sun & sea’ tourism brand remains dominant in Croatia, Greece and Montenegro. However, these countries are now trying to develop more diverse tourism products that are gaining popularity, such as outdoor activities, agro-tourism, cultural tourism, tourism in the protected areas, nautical tourism, health tourism and gastronomy, among others. Bosnia & Herzegovina highlighted history, nature and culture, while Serbia put city breaks and festivals above all other tourism products. Slovenia listed product importance by region, stressing holidays in mountains, health and well-being, and business meetings and events. The branding positions of individual countries vary considerably. Both Croatia and Greece aim to develop a year-round tourism offer that utilizes their strongest brand ‘sun & sea’ and expand it with a variety of diverse tourism products that should geographically spread tourism across the country. Slovenia focuses on green, activity and health tourism, while Serbia places its focus on history.

The responses from the countries provides illustrations of the innovative/unique products to expand the tourism season (Italy did not provide any input). These tourism products covering a wide palette of objectives and geographies, aiming to spread tourism across their territories. For example, Croatia has developed ten thematic routes spread all over the country that revolve around a certain cultural or historical topic. In Bosnia & Herzegovina they have created the Via Dinarica as a regional tourism destination that offers world-class hiking, cycling, skiing, fly-fishing, kayaking, rafting, caving, and abundant opportunities. Other important tourism products are related to gastronomy, festivals and events, landscape variety, outdoor activities, city breaks among other aims. There is the potential to use this information to form joint databases and map resources, as a basis for cooperation.

The future of tourism in the Adriatic Ionian Region (AIR)

(Italy did not provide any input for this section)

The AIR has some important potential in cobranding and promotion (Table 7). The answers received from the countries show that Croatia, Greece and Slovenia partially believe that the AIR can be used in branding and promotion. This is probably because there are similarities in their existing branding strategies and consciousness of the competition between these countries for tourists. It also shows the need for further clarification of areas of common ground. Bosnia & Herzegovina, Montenegro, Albania and Serbia see branding and promotion as a potential and are positive in their opinions. This is a logical interpretation of this region as these countries are emerging or in early stages of tourism development (excluding the Montenegrin coastline).

Table 7: Potential for the AIR to be used in branding and promotion

Legend: 1 Yes 2 No 3 Partially 4 Don't know

	Croatia	Greece	Slovenia	Albania	B&H	Montenegro	Serbia
AIR for branding / promotion	3	3	3	1	1	1	1

When using the AIR for branding and promotion, most of the countries agree that the focus should be on thematically connected products and the sustainable valorisation of natural / cultural heritage (Table 8).

Table 8: Focus and emphasis for potential AIR based common branding and promotion

COUNTRY	Answers
Croatia	Common products (thematically connected)
Greece	On developing common thematic products within the whole area.
Slovenia	X
Albania	X
B&H	Regional promotion on Asiatic and American market. Secure flights and low prices.

Montenegro	<ol style="list-style-type: none"> 1. Cultural heritage and values 2. Natural heritage of the Adriatic Ionian Region – emphasize on sea and parks of nature
Serbia	Sustainable valorization of natural, cultural, traditional and environmental heritage; the creation / development of European Cultural Routes potentially combining Serbian heritage sites

Regarding the future market challenges for tourism in the AIR, the countries state the general problems of unclear priorities and fragmented policies, funding opportunities needed for long term spatial planning and resolving overcrowding/carrying capacity problems, and introducing innovations as key (Table 9). It seems that these issues deserve more attention on the following TSG4 meetings. With more input greater clarification could be achieved.

Table 9: The future market challenges for tourism in the AIR

COUNTRY	Answers
Croatia	National priorities (competition!), fragmented offer, fragmented policies
Greece	There are certain challenges that the AIR needs to measure up in the future. One of them is to ensure that all m-s of AIR have equal chances and access to growth policies and funding mechanisms through coherent and simplified procedures. An additional one is managing the tourism flows in already overcrowded areas. There is a need for spatial planning and establishment of a synergies network among all the stakeholders for an effective policy facing over tourism issues.
Slovenia	-
Albania	<ol style="list-style-type: none"> a) The sophistication of travellers; b) Creating experience;
B&H	Diverse marketing promotion for different markets. There are only four airports in B&H: Tuzla, Sarajevo, Banja Luka and Mostar.
Montenegro	<ol style="list-style-type: none"> 1. too large number of tourists in relation to capacities - emphasize on towns that are cruising destinations 2. insufficient valorisation and visibility of existing cultural and natural heritage 3. insufficient diversification of tourism offer
Serbia	<ul style="list-style-type: none"> • social innovation, • eco-innovation, • promotion of investments in tourism products and service development

The solutions to these challenges are identified as: better cooperation among all tourism stakeholders, joint and in-depth market research followed by joint promotion, resolving infrastructure and resource related problems, and prolonging the tourism season (Table 10).

Table 10: Proposed ideas to meeting the challenges

COUNTRY	ANSWERS
Croatia	Joint market research, joint promotion, better connectivity
Greece	By better cooperation and coordination among stakeholders as stated above.
Slovenia	-
Albania	More programmes and trainings to have professional human resources, evaluation of traveller satisfaction, studies on their behaviours and planning financial resources to better shape and innovate tourism products and creating new ones.
B&H	Good analysis what are the demand on the mentioned markets, and what are our comparative advantages. Many cities/towns should have more airports.
Montenegro	<ol style="list-style-type: none"> 1. Defining measures how to save cities facing this problem 2. Improve valorisation of heritage and diversify offer using EU and other available funds; Encourage the private sector and local communities to get more involved
Serbia	<ul style="list-style-type: none"> • prolonging tourism season • improving quality in tourism • fostering better tourism employment conditions

Six out of seven countries see an opportunity for cross border AIR cooperation in tourism development (Table 11).

Table 11: Cross border AIR cooperation potential

Legend: 1 Yes 2 No 3 Partially 4 Don't know

	Croatia	Greece	Slovenia	Albania	B&H	Montenegro	Serbia
Cooperation	1	3	1	1	1	1	1

Gap Analysis

(Italy did not provide any input for this section)

The TSG4 has identified priorities (divided in 2 topics and 6 targets) for which gaps need to be considered (missing indicators or baseline values etc.). The TSG4 also aims to highlight areas where particular studies or research could be undertaken to further clarify the existing situation in certain thematic and/or geographical areas. For that purpose, the last section in the questionnaire was dedicated to Gap analysis. As the results below suggest, indicators and baseline values do not exist within three countries. However, most of the countries have provided contacts (institutions / experts) that can be contacted for further data and analysis. Since the TSG4 has identified the priorities, it would be logical to assume that the next step would be to conduct a more detailed Gap analysis according to an agreed methodology.

Table 12: Assessment of monitoring (indicators and baseline values) for TSG4 targets.

Legend: 1 Yes 2 Partially 3 No 4 Don't know

		Croatia	Greece	Slovenia	Albania	B&H	Montenegro	Serbia
TOPIC 1								
Diversified Tourism Offer	TARGETS							
Development of sustainable and thematic routes	1. Diversification and increase (e.g. archaeological, historical, festivals, thermal, wellness, wine, thematic routes, cycling, walking/hiking, sailing).	1	1	3	2	1	4	3
Fostering Adriatic-Ionian cultural heritage	1. Diversification of products. 2. Synergies (creative/cultural industries and SMEs + hospitality sector). 3. Valorisation of archaeological heritage.	1	1	3	2	1	4	3
Improvement of SMEs performance and growth-diversification	1. National and transnational clusters and SMEs. 2. Joint regional and transnational entrepreneurial projects and researches. 3. Local communities involved.	1	1	3	-	1	4	3

Croatia	Greece	Slovenia	Albania	B&H	Montenegro	Serbia
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TOPIC 2
Sustainable &
Responsible Tourism
Management.

TARGETS

Training and skills in the field of tourism businesses (vocational and entrepreneurial skills)	New programmes for training and new projects in the field of education for: <ul style="list-style-type: none"> • education professionals, • SME employees; • unemployed. 	4	1	3	-	3	4	3
Expanding the tourist season to all-year round	1. Development of special interest tourism: MICE, rural, alternative tourism, etc.; 2. Exchange of good practices; (events, performances, entrepreneurships and SMEs	2	2	3	-	2	4	3
Developing network of sustainable tourism businesses and clusters	1. Networks of creative industries. 2. Networks promoting and sharing best practices in env. mgmt. 3. Tourism clusters for EMAS, ETIS and other Green (sustainable) Certification / Systems.	2	2	3	-	1	4	3

III. Overview of relevant interdisciplinary knowledge

A review of the EU data and interdisciplinary knowledge was conducted encompassing the relevant programmes, projects and institutions as well as networks and initiatives relevant to sustainable (tourism) development and/or innovative tourism products. The purpose of this was to identify existing or potential correlations with EUSAIR TSG4 Sustainable tourism. There are a series of programmes and projects that were considered that have indirect or direct implications for the development of sustainable tourism within the EUSAIR. This review should not be considered as comprehensive, only as an indicator of the potential opportunities available.

The programme for the Competitiveness of Small and Medium-Sized Enterprises (COSME) Data Hub⁴

The Executive Agency for Small and Medium Enterprises has developed an interactive tool that generates information on EU funding programmes. Data is available on a broad number of programmes including the Horizon 2020, LIFE and Maritime funds. For more information see: <https://cosme.easme-web.eu/>. Many of the projects listed within the data hub balance conservation with sustainability, with an emphasis on non-consumptive uses, such as tourism.

Interreg Adrion⁵ Programme

The Adrion Interreg funding programme focuses on regional innovation systems, cultural and natural heritage, environmental resilience, sustainable transport and mobility as well as capacity building specifically targeting the EUSAIR. As such, this programme has particular relevance for the EUSAIR pillars with an overall budget of €118M. The current call Priority Axis 2, sustainable region, is most applicable to Pillar 3 (environmental quality) and Pillar 4 (sustainable tourism). Under the second call for proposals, 10 projects were funded. The following projects have direct implications for the development of sustainable tourism in the region:

- TOUREST, Tourism Water Management for Sustainable ADRION Coastal Areas;

⁴ <https://ec.europa.eu/easme/en/eic-sme-instrument>

⁵ <http://www.adrioninterreg.eu/>

- ADRION 5 SENSES, Building the ADRION Brand Name in Tourism: Indulging all Five Senses;
- APPRODI, From Ancient Maritime Routes to eco-touristic destinations;
- QNeST, Quality Network on Sustainable Tourism;
- Adriaticaves, Sustainable management and tourist promotion of natural and archaeological heritage in the Adriatic Caves.

For a full list of the projects: <http://www.adrioninterreg.eu/index.php/second-call-for-proposals-priority-axis-2-funded-projects/#toggle-id-2>

Interreg Mediterranean Programme

The Med Programme identifies the importance of sustainable tourism by placing it as one of the core funding mechanisms in the programme. Currently 17 Modular Projects (MPs) are being implemented under the Interreg Med Sustainable Tourism Community. For a full list of projects: <https://sustainable-tourism.interreg-med.eu/>. In addition to this there is a biodiversity protection mechanism which funds 12 ongoing projects several of which have implications for tourism and its sustainability. For a full list of projects: <https://biodiversity-protection.interreg-med.eu/>.

Of particular interest is the DESTIMed project which bring together 13 protected area to collectively develop, manage and promote eco-tourism in the Mediterranean Basin. Several of the DESTIMED MPA case studies were featured in the Sustainable Tourism Indicators Manual of Transfer of Best Practices presented in November 2018 to the European Parliament. See the following for more information: <https://destimed.interreg-med.eu/news-events/news/detail/actualites/new-manual-sustainable-tourism-indicators-manual-of-transfer-of-best-practices-presented-at-the-e/>. Several partners to the DESTIMED project are from the AIR, for more information: <https://destimed.interreg-med.eu/>.

European Neighbourhood and Partnership Instrument⁶ Cross Border Cooperation in the Mediterranean

The ENPI is part of the enlargement negotiations with third countries. The Policy is divided into four geographical sectors one of which is the cross-border cooperation which includes the Mediterranean Sea area. The aim of the ENPI-CBC is to promote sustainable development, reduce disparities in standards of

⁶ <http://www.enpicbmed.eu/>

living and address common challenges. Several projects have been funded under the ENPI-CBC programme, for a full list: <http://www.enpicbmed.eu/projects/running-projects>.

One project of particular interest is the Mediterranean Experience of Ecotourism (MEET), the aim of the project is to foster the diversification of the tourism offer and increase seasonal distribution of tourism flows. It works under the strategic line 'Promoting the sustainable tourism for the socio-economic development and enhancement of territories', and the project involves 10 Mediterranean countries: Italy, France, Spain, Jordan, Lebanon, Egypt, Malta, Cyprus, Greece and Tunisia. For more information see: <http://www.medecotourism.org/default.asp>.

The Bluemed Interreg⁷ project

This project is associated with the horizontal project, BleuTourMed, and brings together infrastructure and human capacity to develop submarine tourism to protect underwater natural and cultural heritage. The main focus is, through several case studies, to create innovative ideas for underwater museums, diving parks and public awareness. The aim is to create new tourism related products including virtual diving systems which allow the public to explore the sites without actually visiting them. This provides the experience without the need for time consuming training, expensive equipment and with zero impact on the environment. This has implications for the future development of new sustainable tourism products in this specialist sector.

Joint Research Centre⁸

The Joint Research Centre (JRC) is the European Commission's science and knowledge service, which employs scientists to carry out research in order to provide independent scientific advice and support to EU policy. The JRC has also provided guidance for the best environmental management practices with reference to the tourism sector. It is suggested that due to the generally large environmental footprint of tourists, compared to residents, that there is a significant opportunity to improve environmental practices in the tourism sector. Eco-efficiency of services provided to tourists vary substantially, however with the growth of 'choice editing' through websites such as booking.com, tripadvisor and others, there are

⁷ <https://bluemed.interreg-med.eu/>

⁸ <http://susproc.jrc.ec.europa.eu/activities/emas/tourism.html>

opportunities for greener operations to leverage change from local to global level. The JRC has produced best environmental management practices for different sectors, including tourism:

- Destination management;
- Tour operators and travel agents;
- To minimise energy consumption in accommodation establishments;
- To minimise water consumption in accommodation establishments;
- To minimise and manage waste in accommodation establishments;
- For food & drink providers;
- For campsites.

For further information: <http://susproc.jrc.ec.europa.eu/activities/emas/documents/TourismBEMP.pdf>

ESPON Inspire Policy Making with Territorial Evidence⁹

The ESPON 2020 Programme promote and fosters a European territorial dimension in development and cooperation. It does this by providing evidence, facilitating knowledge transfer and providing policy learning to stakeholders at all levels. The primary target groups range from policy makers at European level to regional and local policy makers. In addition to the primary groups ESPON also provide evidence based policy making to non governmental organisations, Universities, the business sector and the wider European citizenship.

ESPON provided an interactive web-based application which can be applied geographically to identify the potential impacts of new legislation and policies within a region – the Territorial Impact Assessment (TIA) tool. The tool combines the expert knowledge and judgements about the potential impact with a set of statistical data describing the characteristics of regions. Based on the different sensitivity of regions, the expert judgments are translated into maps showing the potential territorial impact of EU policy on NUTS 3 level. These maps can serve as a starting point for further discussion of different impacts of a concrete EU policy on different regions. This may be particularly applicable for the development of new tourism packages and the impact of tourism policy on those packages based on the context of the location. This has the potential for the development of a sustainable tourism-monitoring platform integrating the AIR

⁹ <https://www.espon.eu/>

countries through comparable statistical data. For more information access: <https://www.espon.eu/tools-maps/espon-tia-tool>

Routes 4 U¹⁰

As part of the Council of Europe and the European Union the Routes 4 U is a 30 month project (2017-20) which aims to foster regional development through the Cultural Routes of the Council of Europe programme in the four EU macro-regions, including the EUSAIR. The aim of the project is to strengthen development within the macro-regions enhancing cooperation between all the stakeholders at multiple levels of governance. In regards to sustainable tourism, the project seeks the participation of civil society to utilise cultural heritage within the macro-regions as a resource for sustainable development. The aim is to identify regional heritage resources that can be used to develop a transnational network for the development of Cultural Routes. Part of this is to strengthen opportunities for the cultural tourism sector and develop cross-border routes that benefit the region as a whole.

Within the EUSAIR, the Roadmap for the Adriatic-Ionian Region contains guidelines for national, regional and local authorities through which to define tourism strategies for the region. For more information see <https://rm.coe.int/16808ecc0a>. Recent developments as part of the Routes 4 U project include the international workshop on 'the cultural routes of the Olive Tree as a model for Europe's values, heritage and sustainable development'. For further information see: <https://pjp-eu.coe.int/en/web/cultural-routes-and-regional-development/-/international-workshop-on-the-routes-of-the-olive-tree-in-the-adriatic-ionic-ionian-region>.

EU Transnational tourism products¹¹,

Sustainable tourism develops hand in hand with the natural and cultural environment. Long-term sustainability requires the balance of economy, socio-cultural and environmental sustainability. To diversify the EU tourism offer, the European Commission has provided co-funding through the COSME programme to develop sustainable transnational tourism products which allows tourists to engage more fully with local communities. These products include themes:

¹⁰ <https://pjp-eu.coe.int/en/web/cultural-routes-and-regional-development>

¹¹ http://ec.europa.eu/growth/sectors/tourism/offer/sustainable/transnational-products_en

- environmentally friendly tourism;
- sports tourism;
- food and wine tourism;
- health and wellbeing tourism;
- nature tourism;
- 'slow tourism'.

The aim of this initiative is to strengthen transnational cooperation in sustainable tourism, encourage greater involvement in sustainable tourism for small and micro enterprises, and local authorities, and stimulate competitiveness in the European tourism sector. Under the 2015 call for proposals, ten projects were financed with the priorities to diversify EU tourism offers and products promoting a transnational theme.

EU Cultural tourism¹²

Europe is a key cultural tourism destination thanks to deep historical and cultural heritage that includes museums, theatres, archaeological sites, cities, industrial sites as well as music and gastronomy. It is estimated that cultural tourism accounts for 40% of all European tourism. The EU recognises the importance of culture as part of the European tourism experience and as an element that can enhance the profile of Europe as a global destination. The EU promotes a balanced approach between the needs to boost growth on one side, and the preservation of artefacts, historical sites, and local traditions on the other. In 2017 the Commission funded 6 projects supporting European cultural heritage-based transnational tourism products using Cultural and Creative Industries (CCIs)-related technologies:

- Development of transnational, creative and cultural tools for travellers along the Ways of Saint James;
- EuroVelo3 – Pilgrims route an innovative transnational combined cultural and cycling tourism product;
- Film festivals And MOvie tourism across UNESCO Sites;
- Development and promotion of a transnational cultural tourism product linked to greenways and UNESCO cultural sites;
- Support to developing innovative tourism offer in The Roman Emperors and Danube Wine Route;
- Wine Senses - An innovative experience to enjoy wine culture and heritage across Europe.

¹² http://ec.europa.eu/growth/sectors/tourism/offer/cultural_en

Part of the route concept is that the focus is on the journey rather than the destination. Cultural routes have a huge potential for developing local businesses, strongly contributing to the local economy and societies, often promoting less known regions, especially rural areas.

European Destinations of Excellence (EDEN)¹³

EDEN aims to promote sustainable tourism development models across the European Union. The initiative is based on national competitions and promotional campaigns that result in the selection and promotion of a tourist 'destination of excellence' for each participating country. Through the selection and promotion of destinations, EDEN effectively achieves the objective of drawing attention to the values, diversity and common features of European tourist destinations. It enhances the visibility of emerging, non-traditional European destinations, creates a platform for sharing good practices across Europe and promotes networking between awarded destinations. The key feature of the selected destinations is their commitment to social, cultural and environmental sustainability of tourism. The EDEN initiative helps to spread the sustainable practices used in the awarded destinations across the EU. The European Commission plays a crucial coordinating role in administering the competition. It encourages dialogue among stakeholders, co-finances the national selection procedures and awareness-raising campaigns, organises the award ceremony and coordinates a comprehensive communication campaign. The priority themes of the EDEN programme change biennially. These theme have included:

- 2017: Cultural tourism;
- 2015: Tourism and local gastronomy;
- 2013: Accessible tourism;
- 2011: Tourism and regeneration of physical sites;
- 2010: Aquatic tourism;
- 2009: Tourism and protected areas;
- 2008: Tourism and local intangible heritage;
- 2007: Best emerging European rural destination of excellence.

For further information see: https://ec.europa.eu/growth/tools-databases/eden/about/themes_en.

¹³ https://ec.europa.eu/growth/tools-databases/eden/about_en

European Tourism Indicators System' (ETIS)¹⁴

Tourist destinations are increasingly being called upon to tackle social, cultural, economic, and environmental challenges. ETIS helps them measure their performance in relation to sustainability using a system of indicators suitable for all tourist destinations, encouraging them to adopt a more intelligent approach to tourism planning. It is:

- a management tool, supporting destinations who want to take a sustainable approach to destination management;
- a monitoring system, easy to use for collecting data and detailed information and to let destinations monitor their performance from one year to another;
- an information tool (not a certification scheme), useful for policy makers, tourism enterprises and other stakeholders.

The ETIS toolkit provides the primary support (guidelines) and clear explanations about what the indicators (core and supplementary) are, and how to use them. It also shows how ETIS complements other existing tools and methodologies at international and European level. The toolkit is now available in English, French, Italian and Spanish. For more information: <http://ec.europa.eu/DocsRoom/documents/21749>.

EU Ecolabel¹⁵

The EU Ecolabel is a Regulation of the European Parliament and of the Council. It is a voluntary scheme, through which producers, importers and retailers from different sectors can choose to apply for the label for their products. The criteria for recognition is a multi-step process which requires a proposal sent to the Ecolabelling Board with the then development of the process and revision of the product/service.

One sector of the EU Ecolabel is for tourism, in particular for accommodation there is a list of organisations that have qualified for the label and are then able to advertise. For more information see: <http://ec.europa.eu/environment/ecolabel/eu-ecolabel-for-businesses.html>.

¹⁴ http://ec.europa.eu/growth/sectors/tourism/offer/sustainable/indicators_en

¹⁵ http://ec.europa.eu/environment/ecolabel/index_en.htm

EU Eco-Management and Audit Scheme (EMAS)¹⁶

EMAS is a management instrument developed by the European Commission for different sectors to evaluate, report, and improve their environmental performance. This is facilitated through the use of Sectoral Reference Documents (SRDs) on Best Environmental Management Practice which provide guidance and inspiration to organisations in specific sectors on how to further improve environmental performance. These SRDs provide a detailed technical report on Best Environmental Management Practices for the relevant sector. These documents are developed for different sectors. Each SRD includes the following elements:

- Best environmental management practices;
- Environmental performance indicators;
- Benchmarks of excellence.

The tourism sector has a dedicated website that provides extensive information on articles, case studies and best practices. For more information: <http://ec.europa.eu/environment/emas/takeagreenstep/>.

Eurovello¹⁷

Cycling is a growing form of tourism. With the new technologies associated with battery assisted cycling this form of tourism is no longer limited to the super fit and healthy, all forms and ages of people can now take part. The EuroVelo cycle route network provides information on 15 routes around Europe, including the Mediterranean and the Adriatic-Ionian Region. For more information see: <http://www.eurovelo8.com/>.

The promotion of cycling has also been made along the coast and island and is included often in tour packages while cruising the AIR. Cycle lanes have been added to many of the developing rural, coastal and island regions to facilitate the growth of this sector. Within the AIR, boat cruising tours regularly include bike rentals as a cost effective method to move locally around the islands and cities.

Forum of the Adriatic and Ionian Chambers of Commerce (AIC Forum)¹⁸

¹⁶ http://ec.europa.eu/environment/emas/index_en.htm

¹⁷ <http://www.eurovelo.com/en>

¹⁸ <http://www.forumaic.org/>

The AIC Forum is a transnational, non-profit association linking the chambers of commerce of countries residing on both Adriatic and Ionian coasts. The aim of the association, is to strengthen the synergies and opportunities for socio-economic development of the Adriatic and Ionian area with the scope of achieving better coordination of its activities. The Forum has identified topics of common interest: Agriculture, Environment, Women's Entrepreneurship, Transport, Tourism and Fisheries/Aquaculture.

The AIC Forum is one of the major promoters of the ambitious Adriatic and Ionian Macroregion project. This strategy represents a joint governance system that involves various participants, diverse politics and attributes present on the territory of the area, increasing the value of cultural heritage and the richness of diversities.

Association of Universities of the Adriatic-Ionian Area (UNIADRION)¹⁹

The UniAdrion is an association of universities and research centres of the Adriatic-Ionian area established to create a permanent connection among these institutions, within the framework of the Adriatic-Ionian Initiative. The purpose of UniAdrion is the collaboration between universities and research centres with the aim of strengthening international cooperation and of favouring the progress of culture, science, training and research in the countries of the Adriatic-Ionian basin. The cooperation is coherent with the pillars of the EU Strategy for the Adriatic-Ionian Region (EUSAIR): blue growth, connecting the region, environmental quality, sustainable tourism and cultural heritage, societal challenges, economic and policy analysis.

Forum of Adriatic and Ionian Cities (FAIC)²⁰

The Forum of Adriatic and Ionian Cities was constituted in Ancona. This association brings together the cities of the 7 countries of the Adriatic-Ionian Basin: Italy, Slovenia, Croatia, Bosnia & Herzegovina, Montenegro, Albania and Greece. The Forum aims to build and develop the economic, social, environmental and cultural heritage of the Adriatic and Ionian cities and to collaborate on European integration and enlargement. It pursues this goal by promoting innovative forms of multi-level decentralized cooperation and partnerships among local authorities of the member Countries.

¹⁹ <http://www.uniadrion.net/>

²⁰ http://www.faic.eu/index_en.asp

Blue Med (research and innovation initiative for blue jobs)²¹

BLUEMED is the research and innovation Initiative for promoting the blue economy in the Mediterranean Basin through cooperation. It is the strategy of reference for the Mediterranean countries to work together for a healthy, safe and productive Mediterranean Sea. The BLUEMED Initiative will contribute to the creation of new 'blue' jobs, social well being and a sustainable growth in the marine and maritime sectors through the implementation of its Strategic Research and Innovation Agenda, the BLUEMED SRIA.

Conference on peripheral maritime regions (CPMR)²²

The CPMR brings together some 160 Regions from 25 States from the European Union and beyond. Representing about 200 million people, the CPMR campaigns in favour of a more balanced development of the European territory. It operates both as a think tank and as a lobby for Regions. Through its extensive network of contacts within the EU institutions and national governments the CPMR has been targeting its action towards ensuring that the needs and interests of its Member Regions are taken into account in policies with a high territorial impact. It focuses mainly on social, economic and territorial cohesion, maritime policies and blue growth, and accessibility.

EMODnet Marine Data Portal²³

EMODnet provides as gateway to various forms of data that integrated and standardised. This data is open-access and provided to minimise redundancy in data collection and promote transparency of data, especially that collected through EU funded programmes. The EMODnet collects data across seven broad disciplines:

- Bathymetry;
- Geology;
- Seabed habitats;
- Chemistry;
- Biology;
- Physics;

²¹ <http://www.bluedmed-initiative.eu/>

²² <https://cpmr.org/>

²³ <http://www.emodnet.eu/>

- Human activities.

While the human activities portal covers cultural heritage, environment and other related assets for tourism, the biological and seabed habitat portals also provide data which could be utilised for the development of specialist sustainable tourism based on the natural assets of the region. For more information see: <http://www.emodnet.eu/portals>.

AdriPLAN Maritime spatial planning project²⁴

The Adriatic Ionian maritime spatial planning project was funded by the DG Maritime Affairs and Fisheries (DG MARE) under the theme 'Maritime Spatial Planning (MSP) in the Mediterranean sea and/or the Black sea'. The aim of the project was to deliver a commonly agreed approach to cross-border maritime spatial planning in the AIR. Over the 18-month period of the project 5 stakeholder workshops were hosted including several tourism groups and part of the aims of the project was to harmonise the implementation MSP in the EUSAIR The project was concluded in June 2015. For more information: <http://adriplan.eu/index.php/project/summary>.

SUPREME Project - Supporting Maritime Spatial Planning in the Eastern Mediterranean²⁵

The SUPREME project builds upon the work of ADRIPLAN and extends to include the eastern part of the Mediterranean Sea. The project objective is to support the implementation of Maritime Spatial Planning in EU Member States within their marine waters in the Eastern Mediterranean, including the Adriatic, Ionian, Aegean and Levantine Seas. In addition it seeks to enable and carry out concrete, cross-border MSP cooperation initiatives between Member States in the Eastern Mediterranean. The project looks at the socio-economic trends within the basin, including tourism, and considers the conflicts and synergies of the use of maritime space between and within sectors. For more information: <http://www.msp-supreme.eu/>.

Portodimare²⁶

The PORTODIMARE project provides a geoportal of tools and data for the sustainable management of coastal and marine environment. Funded by the Interreg-Adriion programme this project started in

²⁴ <http://adriplan.eu/>

²⁵ <https://www.msp-platform.eu/projects/supreme-supporting-maritime-spatial-planning-eastern-mediterranean>

²⁶ <https://www.msp-platform.eu/projects/portodimare-geoportal-tools-data-sustainable-management-coastal-and-marine>

February 2018 and build upon previous maritime spatial planning and integrated coastal zone management projects in the region. It will provide science based support for decision making for the relevant authorities and stakeholders in the region, this includes tourism. For more information: <https://www.msp-platform.eu/projects/portodimare-geoportal-tools-data-sustainable-management-coastal-and-marine>.

EUROPARC Federation²⁷

The EUROPARC Federation is dedicated to practical nature conservation and sustainable development of Europe's biodiversity, fostering holistic landscape approaches in its management. It is the network for Europe's natural and cultural heritage, it works, to improve the management of Protected Areas in Europe through international cooperation, exchange of ideas and experience, and by influencing policy. In 1993 the Federation published their first report looking at the role of tourism in protected area. The Federation awards the European Charter for Sustainable Tourism in Protected Areas, which is annually awarded through an independent verification process.

This has led to the campaign 'good for parks, good for people' which provides a step-by-step guide towards becoming a sustainable destination. For more information see: http://www.europarc.org/wp-content/uploads/2015/12/ECST_2015.pdf.

Mediterranean Protected Areas Network (MedPAN)²⁸

MedPAN is the network of Marine Protected Areas managers in the Mediterranean. The aim of the network is to promote the sustainability and management of MPAs throughout the Mediterranean. The activities of the network revolve around three strategic components:

- Be a network for knowledge, information, anticipation and synthesis;
- Develop the life of the network, the exchanges between its members and their capacity to effectively manage their MPAs in link with the other players in their territories;
- Reinforce the sustainability, prominence, governance and resources of the MedPAN network.

²⁷ <https://www.europarc.org/>

²⁸ <http://medpan.org/about/medpan/organisation/>

With over 100 members and partners working in over 100 MPAs the MedPAN network is an important organisation for the development of sustainable tourism within these sites. The network regularly hosts workshops and training sessions for MPA managers and interested stakeholders. Tourism is a major stakeholder in MPAs bringing substantial funding but also multiple threats to the species and habitats within those areas. For more information: <http://medpan.org/?s=tourism>.

Adriatic Protected Areas Network (AdriaPAN)²⁹

The aim of the network is to make contacts between Protected Areas in the Adriatic easier, to improve their partnership effectiveness, both in management and planning activities. The AdriaPAN network includes about 40 members from all countries bordering the Adriatic Sea, and more than 30 associated organizations (institutions, NGOs, businesses, etc.) interested in collaborating on initiatives. Within the Adriatic Sea and along the Adriatic coast, there are more than 200 Protected Areas recognized by national and international law.

The main objective of the network is to initiate a technical process in support of all MPA managers and staff in the Adriatic, by providing services to improve effective management. It aims at sharing energies and knowledge to promote common programmes of international and regional cooperation for environment protection, sustainable development, green tourism and biodiversity conservation. A common, web-based, communication tool promotes MPAs and their activities. The portal also keeps track of conferences, seminars, meetings or initiatives, creating permanent contacts within the network. The cross-border integration of protected areas contributes significantly to their promotion, accordingly to their capability of being economically self-sustained and effective. The network has great potential to protect biodiversity, cultural heritage and landscape.

AdriaPAN is an integral part of the wider MedPAN within the network it represents and promotes the ecological, cultural and economic specificities of the Adriatic Sea and coast. The AdriaPAN network is considering getting a larger reach to encompass coastal and Marine Protected Areas in the entire Adriatic and Ionian Macro region. A project to support this ambition will be submitted to the Interreg Adrion Programme supporting the EU Strategy of the Adriatic and Ionian region (EUSAIR). AdriaPAN would

²⁹ <http://www.adriapan.org/index.php/en/>



become AdrlonPAN. Two other factors may play in favour of the selection of the project it is a bottom-up initiative based on an existing network and the theme of archaeology and its relation to tourism will be weaved in the project proposal. If successful the AdrlonPAN will combine conservation and tourism, and that is a very relevant approach for MPAs.

IV. Synthesis

In general, the TSG4 representatives have demonstrated a high level of understanding in the concept of sustainable tourism in the context of their countries and the AIR. The process has demonstrated the need for technical assistance and field support to tourism authorities (administration, planning and management) due to the current limited resources within institutions. Based on the feedback from the TSG4 'Monitoring and Evaluation Questionnaire' (Chapter II) and the desk research relevant overview of interdisciplinary knowledge (Chapter III) the following chapter aims to clarify the gaps and identify the steps to move forward to strengthen sustainable tourism in the Adriatic Ionian Region.

1. Monitoring and evaluation of national tourism strategies

Building capacity building for effective monitoring and evaluation of sustainable tourism strategies. Only two countries have formal revision and/or monitoring processes as part of the implementation of their national tourism strategy. There is no information regarding the quality of monitoring and how it is used to inform further planning and decision-making. In addition to this is a lack of local / destination level monitoring considered one of the most significant challenges in achieving tourism sustainability. Finally, the strategic goals do not consider the long term and have no quantitative descriptions that relate to non-economic aspects of sustainability.

Steps:

1. Assess data gaps and required improvements to existing tourism statistics;
2. Develop monitoring systems for national tourism strategy implementation with a mutually comparable set of indicators for the goals;
3. Focus that all three sustainability dimensions – economy, society, environment – represented by accessing perspectives from multiple disciplines and integrating specialist knowledge into the sector;
4. Encourage the link between academia, government and the private sector (Science-Policy-Society Interface).

2. Sustainable tourism monitoring tools

Most of the countries have identified the following ways to improve sustainable tourism practice. The first is to engage with local communities to assess the levels of satisfaction or irritation with tourism development in their community, in coordination research should be undertaken into visitor satisfaction, spending, and motivation to identify synergies or conflict. The assessment of carrying capacity, crowding, and over-tourism in protected areas research will highlight areas for greater exploitation and areas where controls area required. Finally, the tools of TSA - Tourism Satellite Account for estimation of direct impact of tourism on GDP and Tourism Ecological Footprinting should be further developed in the AIR.

Steps:

1. Set-up/improve/expand internationally comparable indicator monitoring systems on a regional-destination level based on the ETIS / INSTO indicators of sustainable tourism development. Thereby defining baseline indicators, templates, data sources, calculation methods/formulas, and benchmarking;
2. Targeted TSA feasibility study / experimental TSA at national level and regional scale;
3. Internationally comparable and harmonized national visitor and local residents' surveys with defined minimum survey content, data collection methods, and data analysis. Results of the national surveys to be gathered, analysed, and disseminated on the TSG4 member scale;
4. Gather best practices and design guidelines on Carrying capacity and Tourism Ecological Footprinting;
5. Propose related capacity building / excellence platforms, to transfer and implement tools.

3. Destination Management Organisations

DMOs currently focus on tourism promotion at destination must evolve to make tourism truly sustainable. It is important that DMOs participate in the broader spatial-physical planning processes at local level, engage with nature/cultural heritage conservation and identify environmental/health risks related to tourism.

Steps:

1. Develop a DMO capacity building programme;
2. Compile a standard guide-book based on best practice for the implementation of sustainability indicators;
3. Involve DMOs as an important stakeholder in local spatial planning processes and activities.

4. The internationally recognized attractions

Internationally recognised attraction can play a special role to attract revenue from outside the region. These attractions can provide access to best practise through the international networks thereby informing management on sustainability indicators among other issues.

Steps:

1. Develop a macro-regional AIR network to transfer best practises from international networks to regional networks;
2. Share experiences in indicator development;
3. Draft a book of standards for the AIR context to ensure credibility and mutual comparability at international level with key topics of visitor surveys, carrying capacity assessments, spatial/time visitor distribution, data management and local community issues.

5. The platform

The future development of sustainable tourism in the Adriatic Ionian Region is about the meeting the challenges of joint market research and promotion, better connectivity and cooperation between stakeholders, developing consistent education programmes, and evaluating traveller satisfaction and developing studies on tourist behaviour. This requires the valorisation of the joint natural and cultural

heritage of the region, the identification and use of the diverse funds on offer, particularly the EU funds, engagement with new technologies and encouraging innovation.

There are existing sustainability systems and initiatives exist in the form of EDEN, ETIS, EMAS, EU Ecolabel, Europarc, Medpan, that have been engaged by a number of the destination in the AIR. Building upon these available networks will facilitate changes.

Steps:

1. List existing research and studies in the AIR;
2. Engage with existing sources and tools: EU data hubs, Destinet and ESPON Targeted Analyses.
3. Create an online database and map of tourism assets and stakeholders to aid cooperation, increase market coordination and identify EU project opportunities;
4. Integrate with other sectors and engage with other pillars, especially Pillar 3, environmental quality;
5. Establish a tourism skills council – a core group of inter-disciplinary specialists;

6. Monitoring TSG4 topics and targets

Assessment of capacity for monitoring indicators and baseline values of TSG4 targets (presented in the table bellow) disclosed an uneven allocation of capability to produce needed indicators and baselines. Hence there is an urgent need to address this by developing common methodology and mechanism to monitor TSG targets.

Table 13: TSG4 topics and targets

TOPIC 1	TARGETS
Diversified Tourism Offer	
Development of sustainable and thematic routes	1. Diversification and increase – natural and cultural assets (e.g. archaeological, historical, festivals, thermal, wellness, wine, thematic routes, cycling, walking/hiking, sailing).
Fostering Adriatic-Ionian cultural heritage	1. Diversification of products. 2. Synergies (creative/cultural industries and SMEs + hospitality sector). 3. Valorization of archaeological heritage.

Improvement of SMEs performance and growth-diversification	<ol style="list-style-type: none"> 1. National and transnational clusters and SMEs . 2. Joint regional and transnational entrepreneurial projects and researches. 3. Local communities involved.
TOPIC 2 Sus. & Resp.Tour.Mgmt.	
Training and skills in the field of tourism businesses (vocational and entrepreneurial skills)	New programmes for training and new projects in the field of education for: <ul style="list-style-type: none"> • education professionals, • SME employees; • unemployed.
Expanding the tourist season to all-year round	<ol style="list-style-type: none"> 1. Development of special interest tourism: MICE, rural, alternative tourism, etc.; 2. Exchange of good practices; (events, performances, entrepreneurship and SMEs)
Developing network of sustainable tourism businesses and clusters	<ol style="list-style-type: none"> 1. Networks of creative industries. 2. Networks promoting and sharing best practices in env. mgmt. 3. Tourism clusters for EMAS, ETIS and other Green (sustainable) Certification / Systems.

Steps:

1. Design standardised monitoring methodology and data gathering mechanism.
2. Setting up the database of:
 - tourism networks and clusters
 - projects / activities relevant to pillar IV and TSG4 targets
 - thematic routes
 - cultural heritage sites
 - training providers in tourism
 - special interest tourism clusters and providers
3. Correlate to the above platform

V. Concluding remarks

The current status of the countries is that they all have some familiarity with sustainability systems and initiatives and this represents an opportunity to build upon existing systems. However, the absence of Italian input and other forms of information from the other countries means that there is a significant data gap. Filling the gap should be considered as an important next step.

Feedback from the countries shows that the AIR has important potential in developing cobranding and promotion. The more developed countries of Croatia, Greece and Slovenia at least partially believe in cobranding and promotion, and the less developed countries all recognise the need. This could provide a mechanism to bring all of the countries to a similar level. However, there is a clear need for further clarification of areas of common ground, which should be defined through the EUSAIR TSG4, with input from the member countries.

It is obvious that there are huge opportunities for sustainable tourism initiatives to be funded, supported and encouraged from the various projects and programmes that are available. Many environmental projects utilise tourism as a form of funding or dissemination of information, yet few fully engage with the tourism sector to make meaningful change both for environmental and local development goals. Likewise, there are tourism initiatives that claim environmental friendly status, but actually do little to engage with nature conservation. To be fully sustainable, tourism is reliant on the environment. It would appear that the two Pillars of sustainable tourism and environmental quality are uniquely connected.

Three core areas need to be worked on:

1. Developing technical assistance for monitoring and understanding better the current situation, analysing gaps and developing a monitoring system, ensuring the relevant authorities are then fulfilling their role;



2. Developing new ideas that may apply locally or nationally but are the building blocks of a regional EUSAIR narrative, creating a recognition brand from the EUSAIR to those products particularly fulfil the aims of both Pillar 4 and Pillar 3;
3. Providing consistent leadership and advice through an interdisciplinary tourism skills council, with relevant advisory groups, set at macro-regional level.

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