

EUSAIR Action Plan revision  
Thematic consultation questionnaire for Pillar 4 TSG

## EUSAIR Action Plan revision

### Thematic consultation questionnaire for Pillar 4 TSG

This document was developed by the EUSAIR Facility Point Lead Partner in cooperation with external experts as a starting point for thematic consultation on EUSAIR Action Plan revision in TSGs and with relevant policy owners in the EUSAIR countries. It is to be used with the Initial policy paper for thematic consultation and is intended to collect feedback from country policy owners.

The overall process and context in which these documents will be used is described in the Background document with Roadmap on the EUSAIR Action Plan revision v4.

This questionnaire shall be addressed to tourism governance structures. We propose for the TSG members to gather all relevant inputs from their country so that **only one questionnaire** is submitted from one country. The best way would be to organise a meeting or a workshop with relevant representatives of the sector to discuss and agree on the country's input. Facility Point project partners shall technically support the process upon request from TSG members or National Coordinators.

As described in the Background document each country has the national consultation organised differently and involving different sectors and governance levels.

**The completed questionnaire shall be returned to Pillar 4 Coordinators, Pillar 4 thematic expert, EC representative and Facility Point Lead Partner with external experts by 16 December 2022.**

The Pillar Coordinators, Pillar thematic experts, EC representative supported by Facility point LP with external experts will organise the gathered information and prepare proposals to be discussed by the National coordinators presumably in January 2023 and at the next TSG meeting planned for February or March. At this next meeting agreements on the content shall be made by the TSG members.

The purpose of this questionnaire is to structure and organise the gathering of country inputs using the same methodology for all 4 Pillars, however the respondents should not feel limited by the questionnaire. Any other information deemed important and not encompassed in the given questions is welcomed as well.

Suggestion on how to use the questionnaire: the questionnaire is not meant to be circulated to the possible participants of the workshop or meeting organised to collect the country inputs. We propose to share the Initial policy paper with participants, while the questionnaire is to be used by the organiser to lead the discussion at the workshop/meeting using the prepared questions or their simplification. The questionnaire should be completed by the organiser at the end of the workshop/meeting to summarise the information provided and agreed by the participants.

Disclaimer: The gathered information will be used for further consultation on the level of TSGs and National Coordinators. The gathered elements from this questionnaire will be reflected in the final Action Plan. However, the decision regarding the inclusion of thematic elements in the revised Action Plan lies in the hands of the EUSAIR Governing Board.

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## 1. Topic 1: Diversified tourism offer (products and services)<sup>1</sup>

### 1.1 Challenges

- 1.1.1 Please **prioritise the challenges** provided in the initial policy paper to reflect how relevant they are as regards the added value of being tackled by EUSAIR. **(1 being the most important, other follow in the numerical order).**

*In the Adriatic Ionian Region it is noted:*

3	<i>Intense seasonality is characteristic for AIR destinations (high dependence of local GDP on seasonal tourism creates wider and numerous socio-economic problems)</i>
2	<i>The need to complement "sun and sea tourism" with other thematic tourism products facilitating "off season tourism"</i>
1	<i>Diversification of tourism product in general, promotion and support to the development of special interest tourism</i>
5	<i>Need for more diversified product, related to authentic cultural and natural resources especially in less visited areas</i>
4	<i>Balanced distribution of diversified offer</i>
6	<i>The need to develop quality, innovative and sustainable offer of tourism products by tapping into the authentic AIR potentials: linking the offer of coastal tourism to hinterland; sustainable capitalization of rich natural heritage and protected areas (IUCN example); including contemporary cultural productions via integration of CCI to complement the current focus on history and classical sites</i>

- 1.1.2 Are there any suggestions for reformulation/specification of the challenges provided in the initial policy paper with regard to your country's involvement in Pillar IV/Topic 1 of EUSAIR?

As to the first challenge, seasonality may also cause overtourism, which should be mentioned here since it is a challenge to face within the transition towards a more sustainable tourism. Suggestion: "intense seasonality is characteristic for AIR destinations (potential risk of overtourism and high dependence of local GDP on seasonal tourism create wider and numerous socio-economic problems)"

- 1.1.3 Is there another challenge concerning the thematic field of *Topic 1: Diversified tourism offer (products and services)*, for which you see an added value of being addressed at EUSAIR level? The challenge should be specific to the EUSAIR territory and scope.

Please, see 1.1.2 : facing overtourism in the most popular areas as direct consequence of seasonal tourism and enhancing connections to areas whose potential for tourism is not yet developed and their accessibility.

<sup>1</sup> For now the titles of the topics remain the same, they will be revised according to the newly agreed objectives and actions.

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## 1.2 Objectives

The **objective** of the 2014 Action Plan was updated in the initial policy paper:

*Diversification of the macro-region's tourism products and services, tapping into its unique natural, cultural and social potentials to improve the environmental sustainability and economic resilience of inland, coastal and maritime tourism in the Region with higher participation of local communities.*

*Different aspects from trends in tourism policy to be considered:*

- *Cultural tourism and interaction with CULTURE Programme, MEDIA Programme  
Moving from strictly history-culture duo to CCI, in line with guidelines on "New European Bauhaus" (linking research and innovation with arts and culture on topics like smart and climate neutral destinations, ensuring that the implemented solutions are not just sustainable, but also accessible, convenient and improve the quality of the experience and life of local communities).*
- *Sustainable produce  
Link to "From Farm to Fork" strategy – Tourism as a leading sector to promote locally and sustainably produced food.*
- *Sustainable mobility  
Multimodal traveling (TSG2), encouraged use of public transport in tourism products, greening the fleets (TSG2), promotion of sustainable modes of transport (throughout tourism offers such as walking tourism, cycling, walking and cycling routes like Eurovelo), improved intermodality (TSG2)*
- *Redirection of hospitality and all tourism services towards circular models, reduction of their environmental footprint and increase in their resource efficiency*
- *Social and demographic changes: rise of new dynamic market segments reflecting changes in consumer preferences*
- *Promotion of secondary tourism destinations: complementing AIR's primary tourism destinations, thus facilitating the flow of tourism demand in broader geographical and thematic basis*

- 1.2.1 Are there any suggestions for its reformulation/specification? Please, consider also the different trends in tourism policy accompanying the main objective.

It could be specified that part of the goal is developing new products and services for the tourism sector thanks to the involvement of CCIs.

Any additional objectives will be derived from the challenges provided under point 1.1.3.

## 1.3 Key stakeholders

- 1.3.1 Which are the **most relevant national/regional** (e.g. national/regional institutions, agencies, others) **and international** (e.g. networks, associations, organisations, partnerships) **stakeholders** to be involved in order to reach most efficiently the objectives of the Topic 1.

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(objectives provided in point 1.2.1 and additional ones derived from challenges added under point 1.1.3, if relevant)? Indicative key stakeholders are already listed in the initial policy paper.

National tourism boards and government bodies (as coordinator for regions and minor bodies), universities dealing with tourism and hospitality, hospitality services

## 1.4 Relevant policies

1.4.1 The following **policies, regulations, directives, initiatives** etc were identified as relevant for the *Topic 1: Diversified tourism offer (products and services)*. Please also think about the funding opportunities related to these policies. Which are the most relevant?

*(Please tick the boxes before the selected policies)*

X	Transition Pathway for Tourism, DG GROW
X	EU strategy for sustainable tourism, European Parliament
	A new approach for a sustainable blue economy in the EU - Transforming the EU's Blue Economy for a Sustainable Future, COM(2021) 240 final
	A European Strategy for more Growth and Jobs in Coastal and Maritime Tourism COM(2014) 086 final
X	European Green Deal and related policies/initiatives Farm to Fork, Circular Economy Action Plan, New European Bauhaus...
	Next Generation EU Recovery Plan
	Digitising European Industry and Digital Innovation Hubs
	National thematic strategies of EUSAIR MS
X	Capitalise on existing EU networks:
	Cultural Routes of the Council of Europe
	UNESCO creative cities (with the opportunities to interact on global scale)
	European Cultural Tourism Network (ECTN)
	Creative Tourism Network (CTN)
	European cultural capitals in the AI area
	EDEN sites (European Destinations of Excellence) and the EDEN network
	European Creative Hubs Network

1.4.2 Is there another policy, or initiative, to be mentioned?

## 1.5 Actions

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There are two Actions foreseen in the initial policy paper:

**Action 1.4: AIR tourism observatory** (building on INSTO methodology – International Sustainable Tourism Observatory from UNWTO)

*Systematic collection of data to monitor the tourism sector in the AIR to enable tourism stakeholders on taking strategic decisions regarding tourism development and trends.*

- open data system to compile information from different sources through a defined set of indicators on a national and regional level, taking into account different stakeholder data requirements
- publishing of yearly reports on tourism development (current tourism infrastructure and future demand) and trends
- sharing best practices of ETIS awarded destinations and expanding the number of ETIS destinations (European Tourism Indicator System) including the sustainability and social responsibility indicators
- exploring possibilities to establish a permanent centre of expertise for improved communication and cooperation in tourism at macro-regional level (like Baltic Tourism Centre EGTC).

**Action 1.5: Establishment of AIR sustainable tourism community** (similar to MED sustainable tourism community)

- Potential for new cultural tourism products and new Flagship projects following CULTURAIR results
- encouragement of cluster and network building among AIR tourism stakeholders on different topics/thematic tourism products (sustainable cruise destinations, cultural routes, EDEN destinations, EMAS, Ecolabel networks, valorisation of nature protected areas, UNESCO Creative Cities, European cultural capitals, art networks, EUROVELO, European long-distance paths...)
- mapping of stakeholders/thematic network organisations/project partnerships
- providing information on funding opportunities
- match-making activities
- best practice repository on smart tourism, culture, sustainability, innovation, accessibility, heritage valorisation...
- tourism stakeholder events supporting networking and internationalization of tourism SMEs
- on-line platforms.

**Action 1.6.: Fostering Adriatic-Ionian cultural heritage**

- In order to diversify the Region's profile in the eyes of its visitors and to extend the tourism inflows beyond the summer season, the rich cultural background and assets should be further exploited.

1.5.1 Please indicate the **relevance of each Action** to reflect how important it is for your country's cooperation in EUSAIR. **(Please tick the relevant box before each Action)**

Very relevant	Fairly relevant	Not relevant	Action title
	X		Action 1.4: AIR tourism observatory (building on INSTO methodology – International Sustainable Tourism Observatory from UNWTO)
	X		Action 1.5: Establishment of AIR sustainable tourism community (similar to MED sustainable tourism community)
	X		Action 1.6.: Fostering Adriatic-Ionian cultural heritage.

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- 1.5.2 Are there any suggestions for reformulation/specification of the Actions provided in the initial policy paper?

Action 1.6.: Fostering Adriatic-Ionian cultural and natural heritage.  
(The focus on the biodiversity of the natural heritage of the region is important too).

- 1.5.3 Are there any additional ideas in terms of Actions on how the listed challenges could be addressed by the EUSAIR concerning the thematic field of Topic 1? Please remain within the parameters of macro-regional relevance, EU policies compliance and EUSAIR territory and scope.

Investing in MICE and fairs as a way of attracting tourist flows in low season periods and developing further infrastructures.

## 2. Topic 2: Smart (innovation and quality) and sustainable tourism management

### 2.1 Challenges

- 2.1.1 Please **prioritise the challenges** provided in the initial policy paper to reflect how relevant they are as regards the added value of being tackled by EUSAIR. *(1 being the most important, other follow in the numerical order)*

*In the Adriatic-Ionian Region there is:*

3	<i>A need for coordinated, inclusive (stakeholder engagement), place and evidence based tourism planning, management, governance and monitoring to address AIR tourism challenges</i>
2	<i>A need to reduce tourism environmental impact (efficient use of resources and pollution reduction)</i>
4	<i>A need to include adaptation to climate change and crisis resilience capacity in planning (for example COVID-19 and focus on outdoor offer and domestic tourists)</i>
1	<i>A need to address the gap in skills and capacities of tourism actors in AIR (tourism planners, managers and implementers) for more sustainable, resilient, innovative and quality tourism offer and services</i>
6	<i>Management of Short-term rental services</i>
5	<i>A need to include Digital and green transition and resilience initiatives in established AIR sustainable Tourism community – to build an adaptation policy</i>

- 2.1.2 Are there any suggestions for reformulation/specification of the challenges provided in the initial policy paper with regard to your country's involvement in Pillar IV/Topic 2 of EUSAIR?



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As to the need to address the gap in skills and capacities of tourism actors, the focus should be on the introduction of new high level training courses for current and future workers of the sector.

- 2.1.3 Is there another challenge concerning the thematic field of Topic 2: Smart (innovation and quality) and sustainable tourism management for which you see an added value of being addressed at EUSAIR level? The challenge should be specific to the EUSAIR territory and scope.

Ensuring the user-friendliness of the redeveloped tourist facilities (which will be transformed to be compliant with environmentally sustainable standards) to be achieved not only through workers upskilling, but also informing, educating and sensitising tourists.

## 2.2 Objectives

The **objective** of the 2014 Action Plan was updated in the initial policy paper:

*Strengthening resilience and sustainability of Adriatic-Ionian tourism through digital and green transition of macro-regions' tourism management.*

*Different aspects from trends in tourism policy to be considered:*

- *Digital transition*  
*Data sharing between the public and the private sector to help create innovative tourism services that support sustainability, manage tourism flows based on real-time data, stimulate tourism demand and match supply more effectively or services that generate data and statistics to feed into policy and decision making. Digital transformation of tourism industry: from conventional tourism industry to intelligent tourism ecosystem that augments and facilitates travellers' experience*
- *Improved governance and management*  
*Aligning objectives of regional/national tourism strategies and destination management plans with EUSAIR including guidance and best practice exchange (development of EUSAIR tourism strategy)*
- *Improved skills of tourism actors*  
*Green, digital and entrepreneurial skills of tourism actors need to be improved as well as strategic and administrative skills at the level of policy development and destination management*

- 2.2.1 Are there any suggestions for its reformulation/specification? Please, consider also the different trends in tourism policy accompanying the main objective.

Just commenting on the formulation, a positive remark about the choice of relating the green and digital transition particularly to the way in which the sector of tourism is managed, since a more

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sustainable management is a key-factor to balance the economic development of the tourism industry with the growth of the sustainability of the sector.

Any additional objectives will be derived from the challenges provided under point 1.1.3.

## 2.3 Key stakeholders

- 2.3.1 Which are the most **relevant national/regional** (e.g. national/regional institutions, agencies, others) **and international** (e.g. networks, associations, organisations, partnerships) **stakeholders** to be involved in order to reach most efficiently the objectives of the Topic 2. (objectives provided in point 2.2.1 and additional ones derived from challenges added under point 2.1.3, if relevant)? Indicative key stakeholders are already listed in the initial policy paper.

National tourism boards and government bodies (as coordinator for regions and minor bodies), regional bodies for the promotion of tourism and culture, research institutes, hospitality services, partnerships, cultural/tourism clusters

## 2.4 Relevant policies

- 2.4.1 The following **policies, regulations, directives, initiatives** etc were identified as relevant for *Topic 2: Smart (innovation and quality) and sustainable tourism management*. Please also think about the funding opportunities related to these policies. Which are the most relevant?  
*(Please tick the boxes before the selected policies)*

X	Transition Pathway for Tourism, DG GROW
X	EU strategy for sustainable tourism, European Parliament
X	A new approach for a sustainable blue economy in the EU - Transforming the EU's Blue Economy for a Sustainable Future, COM(2021) 240 final
	A European Strategy for more Growth and Jobs in Coastal and Maritime Tourism COM(2014) 086 final
	Smart Specialisation Strategies
X	European Green Deal and related policies/initiatives Farm to Fork, Circular Economy Action Plan, New European Bauhaus...
	Next Generation EU Recovery Plan
	Digitising European Industry and Digital Innovation Hubs

- 2.4.2 Is there another policy, or initiative, to be mentioned?



## 2.5 Actions

There are three **Actions** foreseen in the initial policy paper:

### **Action 2.2: Coordinated policies, management and funding**

- *new models and strategies built on sustainable development and inclusive (e.g. accessibility) principles, enforcing digital transition that enhances travellers' experience and optimises supply and demand matching (data-driven tourism services, smart destinations), promoting effective and collaborative governance among all stakeholders groups, facilitating more innovative processes and paying close attention to the specific strengths and challenges of tourism destinations and territories exchange and coordination in development/implementation (funding) of macro-regional, national and regional tourism strategies*
- *development of macro-regional tourism strategy*
- *development of strategic planning and management tools for the tourism industry in the destinations to overcome and address the current challenges and create long-term and integrative dynamics guaranteeing the sustainability of tourism in the future*
- *development of collaborative governance of tourism destinations supported by harmonized and unified methodological framework for statistical surveys in tourism industry development in each destination*
- *balancing tourism flows through the local stakeholder collaboration (bottom up) for supporting sustainable tourism development in each destination*
- *development of collaborative governance of tourism destinations through harmonization of government practices in the development of joint set of quality standards*
- *Smart specialisation network for tourism and culture-related priorities*

### **Action 2.3: Promotion of AIR destinations on world markets**

- *establishment of AIR tourism brand*
- *common promotion/PR campaigns in key markets*

### **Action 2.5: Education, training and skills for tourism**

- *Awareness raising campaigns targeting the tourism transition pathway to destination authorities, tourism management organisations and SMEs*
- *Network of LLL centres and institutions providing tourism trainings on inclusion of tourism transition topics into their programmes*
- *Network of tourism educational institutions on inclusion of twin transition topics into curricula*

2.5.1 Please indicate the relevance of each Action to reflect how important it is for your country's cooperation in EUSAIR. **(Please tick the relevant box before each Action)**

Relevant	Fairly relevant	Not relevant	Action
X			Action 2.2: Coordinated policies, management and funding
	X		Action 2.3: Promotion of AIR destinations on world markets

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<b>X</b>			Action 2.5: Training and skills for tourism
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- 2.5.2 Are there any suggestions for reformulation/specification of the Actions provided in the initial policy paper.

Action 2.2 • effective, collaborative “and participatory” governance (suggestion to further emphasize the active role of the various actors involved in governance)

- 2.5.3 Are there any additional ideas in terms of Actions on how the listed challenges could be addressed on the EUSAIR level concerning the thematic field of Topic 2? Please remain within the parameters of macro-regional relevance, EU policies compliance and EUSAIR territory and scope.

Not to be listed, but just a general reminder: as to the challenge addressing the management of short-term rental services, it could be useful to stay updated about the discussions on the EC proposal for a Regulation on data collection and sharing relating to short-term accommodation rental services.

### 3. Prioritization of Actions

- 3.1.1. Please **prioritise the actions** provided in the initial policy paper to reflect how important you find them for your country's cooperation in EUSAIR (all proposed TSG4 Actions together). **(1 being the most important, 5 the least important).**

5	Action 1.4: AIR tourism observatory
3	Action 1.5: Establishment of AIR sustainable tourism community
2	Action 1.6.: Fostering Adriatic-Ionian cultural heritage
1	Action 2.2: Coordinated policies, management and funding
6	Action 2.3: Promotion of AIR destinations on world markets
4	Action 2.5: Training and skills for tourism

### 4. Other challenges and Actions

- 4.1.1. Do you have any additional ideas for **Challenges or Actions** to be addressed by EUSAIR concerning the Pillar 4, not already included under Topic 1 or 2? Please remain within the parameters of macro-regional relevance, EU policies compliance and EUSAIR territory and scope.

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Commenting on the wide range of challenges set under topic 1-2, a great variety of aspects related to the major future challenges for the sector has been considered.

## 5. EUSAIR governance

- 5.1.1 Please comment on your experience of engaging with TSG4 or EUSAIR in general in terms of its effectiveness.

Engaging with TSG4 and EUSAIR in general is a great opportunity to gain awareness of the common challenges and goals shared by the AIR and consequently to find strategies gathering the experience of more countries or areas, which is added value for each single EUSAIR member and provide with a wider and more accurate perspective on the tackled topics. This enhances the efficiency of policies and decision-making processes at national level too.

- 5.1.2 Do you have something to suggest in terms of improving the functioning of TSG4 or EUSAIR in general?"

Tourism and events: further research the connection between congresses, trade fairs and tourism as a potential solution to support deseasonalization and the revitalization of new destinations.