# EUSAIR Action Plan revision- Thematic consultation for Pillar 4 TSG- **RESULTS of questionnaires (Albania, Croatia, Bosnia and Hercegovina, Greece, Italy, Montenegro, San Marino, Serbia, Slovenia)**

Thematic consultation questionnaire 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 was intended to be used with the Initial policy paper for thematic consultation and to collect feedback from country policy owners.

The overall process and context in which these documents are used is described in the Background document with Roadmap on the EUSAIR Action Plan revision v5, approved through Governing Board Written Procedure in December 2022.

The questionnaire was addressed to tourism governance structures. TSG members gathered all relevant inputs from their country in the period from November 2022 till 30 January 2023 so that only one questionnaire was submitted from one country. As described in the Background document each country has had the national consultation organised differently, involving different sectors and governance levels.

Pillar Coordinators have forwarded all received questionnaires to the Facility Point Lead Partner that merged information from all countries in one document. No consolidation was made at this point yet. In cooperation with Pillar thematic experts proposals for Pillar/Topic reformulations/additions were gathered by the Facility Point Lead Partner and will be presented to the Revision Working Group.

The Pillar Coordinators, Pillar thematic experts supported by Facility point LP with external experts will organise the gathered information and prepare proposals to be discussed at the next TSG meeting planned for March/April. At the TSG meeting agreements on contents of most Action Plan chapters (e.g. objectives, challenges, policies, key stakeholders, actions, indicators, targets) will be sought, using the received inputs as the basis. This will be a moderated discussion. After the meeting results will be written down, sent first to Pillar Coordinators and then to TSG members. After fine-tuning they will be included in the first draft of the Action Plan for further commenting from the strategic level (National Coordinators, EC...) and for another round of public consultation. The consolidation process will therefore happen entirely in the TSG.

## Topic 1: Diversified tourism offer (products and services)[[1]](#footnote-1)

### Challenges

* + 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).***

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| ***Question/ Given answers: how many times the answer was marked*** | ***1***  ***(most important)*** | ***2*** | ***3*** | ***4*** | ***5*** | ***6***  ***(least important)*** |
| *Intense seasonality is characteristic for AIR destinations (high dependence of local GDP on seasonal tourism creates wider and numerous socio-economic problems)* | *3X*  *(SER,HR, MN)* | *1x (SM)* | *4x (AL,IT,GR,SLO)* |  | *1x (BIH)* |  |
| *The need to complement “sun and sea tourism” with other thematic tourism products facilitating “off season tourism”* | *2x (SM,GR)* | *3x (AL,IT,SLO)* | *2X*  *(SER,HR)* |  | *1x (MN)* | *1x (BIH)* |
| *Diversification of tourism product in general, promotion and support to the development of special interest tourism* | *3x (AL,IT,BIH)* | *1X (SER)* |  | *1x (SM)* | *1X*  *(HR)* | *1x (MN)* |
| *Need for more diversified product, related to authentic cultural and natural resources especially in less visited areas* |  | *2x (BIH, MN)* | *1x (SM)* | *1X*  *(HR)* | *3x (AL,IT,SER)* |  |
| *Balanced distribution of diversified offer* |  |  | *1x (BIH)* | *3x (IT, MN,SER)* |  | *3X*  *(AL,HR,SM)* |
| *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* | *1X (SLO)* | *2X*  *(GR,HR)* | *2x (MN,SER)* | *2x (AL,BIH)* | *1x (SM)* | *1x (IT)* |

* + 1. **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?**

CROATIA

• Local entrepreneurs (SME) should be included in tourism products, such as local food and beverages, traditional crafts and products

• Rich natural, cultural, historic and archaeological heritage but not exploited in a sustainable and responsible way or not exploited at all

• Need for knowledge and skills on sustainable tourism

• Need for higher level of quality in tourism offer

• Poor implementation of sustainable tourism development policies and responsible tourism concepts

• lack of models for better stakeholders’ involvement (local population, visitors)

• Insufficient ecological awareness of tourism participants

• Seasonality

• Complex and not harmonized regulatory framework

• Low level of diversification of the tourism offer

• Low level of accessibility of attractions to the visitors with special access needs

• Inconsistency in the quality of infrastructure

• Low labour productivity

• Insufficient entrepreneurial and managerial skills

• Low innovation capacity

SAN MARINO: Improve the matching between the consortia of countries in even diversified sectors

GREECE:

Action 1.50 “Sustainable and thematic tourist routes’’ is very important. Τhe importance of higher participation of local communities should be underlined. In order to raise the awareness of the Strategy and enhance the perception of the ownership, the involvement of the key stakeholders in local/regional level is considered an essential factor. The development and promotion of special forms of tourism products is a competence at local and regional level as well.

ITALY:

As to the first challenge, seasonality may also cause over tourism, 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 over tourism and high dependence of local GDP on seasonal tourism create wider and numerous socio-economic problems)”.

ALBANIA:

* “Improving accessibility for Adriatic-Ionian tourism products and services” – adjustment of tourism products and services in the Region to the needs of both residents and visitors with special access needs (i.e. senior groups, young people and schools, disabled people, families with low income
* “Sustainable tourism R&D platform on new products and services” – joining forces in the Region among university departments, research centres, innovation and technology transfer networks, together with the business community for development and marketing of new products and services, development of clusters and smart specialisation strategies.
  + 1. **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.**

CROATIA: The EUSAIR Pillar 4 Sustainable tourism specific objectives are diversification of the macroregion’s tourism products and services along with tackling seasonality of inland, coastal and maritime tourism demand and improving the quality and innovation of tourism offer and enhancing the sustainable and responsible tourism capacities of the tourism actors across the macro-region.

SAN MARINO: Enhance the multi-territoriality and multi-country of the projects

BIH: All challenges are noted.

GREECE: As the Strategy refers to 10 m-s that are at different levels of tourism development, key challenge is to create new products and services that on the one hand truly enrich the diversified offer and on the other hand really satisfy the needs of all or at least the majority of the m-s. Sustainable cultural tourism community or sustainable tourist community strengthening cultural tourism in AIR - explanation: Updated version should also upgrade the term “..Sustainable and Thematic Cultural Routes”, EUSAIR Action Plan revision Thematic consultation questionnaire for Pillar 4 TSG GR 3 especially underlining in concrete terms the significance between Cultural Routes and sustainable tourism.

ITALY: Please, see 1.1.2 : facing over tourism 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.

SLOVENIA: Finding key factors/problems (labour shortage, migration, resettlement...)

### 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 (throught 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: complementινγ AIR’s primary tourism destinations, thus facilitating the flow of tourism demand in broader geographical and thematic basis*
    1. **Are there any suggestions for its reformulation/specification? Please, consider also the different trends in tourism policy accompanying the main objective.**

CROATIA:

• “Improving accessibility for Adriatic-Ionian tourism products and services” – adjustment of tourism products and services in the Region to the needs of both residents and visitors with special access needs (i.e. senior groups, young people and schools, disabled people, families with low income

• “Sustainable tourism R&D platform on new products and services” – joining forces in the Region among university departments, research centres, innovation and technology transfer networks, together with the business community for development and marketing of new products and services, development of clusters and smart specialisation strategies.

SAN MARINO: Development of eco-friendly transport with ad hoc incentives for tourist destinations.

GREECE: Since our objective refers to sustainability, we suggest a reference to the UN Sustainable Development Goals, Agenda 2030 as well.

ITALY: 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.

### Key stakeholders

* + 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. (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.**

CROATIA: Croatian Tourism Board, Ministry of Tourism and Sports, scientific organizations

MONTENEGRO:

Development of sustainable cultural tourism – Key stakeholder host of the sustainable cultural routes (NGO of private entity).

* “From Farm to Fork” strategy – key stakeholder association of rural households, NGOs, private entities who are already known as the leaders at the level of the local community and drivers of further development of the local community.
* “Encouraged use of public transport in tourism products” – kay stakeholders are municipalities that should be supported with grants for procurement of public transport in energy sustainable way.
* “Promotion of sustainable models of transport” – key stakeholders NTOs, LTOs, authorities coordinating National parks and Nature protected areas, NGOs and private sector in tourism (accommodations, travel agencies, service providers). Improved intramodality – key stakeholders municipalities, private transport companies, grants for making the system of integral electronic ticket for public and private transports.
* “Redirection of hospitality and all tourism services towards circular models, reduction of their environmental footprint and increase in their resource efficiency”.
* “Promotion of secondary tourism destinations: complement AIR’s primary tourism destinations, thus facilitating the flow of tourism demand in broader geographical and thematic basis”. Key stakeholders for both: Ministries of Tourism, NTOs, Municipalities, LTOs, NGOs, Local service providers Associations. Encouraging of forming of the working teams on the local levels who will find the best way how to make redirection of hospitality in order to reduce environmental pressure from tourism and develop fewer known parts of municipalities. Public & private cooperation in a way of implementation of strategies and action plans for sustainable development of municipalities. Grants to support this activity.

Key stakeholders for both:

Ministries of Tourism, NTOs, Municipalities, LTOs, NGOs, Local service providers Associations. Encouraging of forming of the working teams on the local levels who will find the best way how to make redirection of hospitality in order to reduce environmental pressure from tourism and develop fewer known parts of municipalities. Public & private cooperation in a way of implementation of strategies and action plans for sustainable development of municipalities. Grants to support this activity.

SAN MARINO:

* Aggregations of companies in the hospitality sector, both structured and unstructured, for the performance of joint commercial and promotional actions.
* Companies that deal with strategic consultancy for public authorities.
* Aggregations of cities from different countries or regions united by common territorial ties and roots(i.e Sustainable Tourism Development Project from Republic of San Marino, with the endorsement of the United Nations World Tourism Organisation (UNWTO) and the support of the Italian Ministry of Tourism, as a touristic network in cooperation with the Emilia-Romagna and Marche Regions and over 110 Mayors of neighbouring municipalities

BIH: UNWTO; USAID; UNDP; GIZ; RCC; China-CEEC’s Tourism Cooperation

GREECE: On international level: UNWTO, OECD. (if possible to add). The Cultural Routes of the Council of Europe (CoE) Network crossing EUSAIR, empowerment and linkages with sustainable tourism community

- Cultural Routes of CoE Universities Network.

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

SERBIA: Institutes for natural and cultural protection

SLOVENIA: National tourism organizations

ALBANIA: Ministry of Tourism and Environment, National Tourism Agency, Universities dealing with tourism services (accommodation, tourist sales, tourguides), Agencies for Regional Development, tourism business associations, Albanian Development Fund

### Relevant policies

* + 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?**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| ***Most relevant*** | ***Ranking*** |  | ***Some countries ranked policies, regulations, directives, initiatives etc by importance, some only marked the ones deemed most relevant*** | |
| *5X (AL,IT,GR, MN,SLO)* | *4 (HR), 1 (BIH)* |  | *Transition Pathway for Tourism, DG GROW* | |
| *5X(AL,IT,MN,GR,SLO)* | *3 (HR), 2 (BIH)* |  | *EU strategy for sustainable tourism, European Parliament* | |
| *2X (GR, AL)* | *6 (HR,BIH)* |  | *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* | |
| *3X(AL,MN,GR)* | *7 (HR,BIH)* |  | *A European Strategy for more Growth and Jobs in Coastal and Maritime Tourism COM(2014) 086 final* | |
| *5X(AL,MN,GR, IT,SLO)* | *8 (HR), 3 (BIH)* |  | *European Green Deal and related policies/initiatives Farm to Fork, Circular Economy Action Plan, New European Bauhaus…* | |
| *1X (AL)* | *1 (HR), 5 (BIH)* |  | *Next Generation EU Recovery Plan* | |
| *3X(MN,SM,SLO)* | *5 (HR), 8 (BIH)* |  | *Digitising European Industry and Digital Innovation Hubs* | |
| *2X (AL,SM)* | *2 (HR), 4 (BIH)* |  | *National thematic strategies of EUSAIR MS* | |
| *3X (AL,IT,SER)* | *4 (HR), 9 (BIH)* |  | *Capitalise on existing EU networks:* | |
| *3X(MN,SM,GR)* |  | *2 (HR)* | *2X (SER,SLO)* | *Cultural Routes of the Council of Europe* |
|  |  | *1 (HR)* | *2X (SER,SLO)* | *UNESCO creative cities (with the opportunities to interact on global scale)* |
| *3X(MN,SM,GR)* |  | *4 (HR)* | *2X (SER,SLO)* | *European Cultural Tourism Network (ECTN)* |
| *2X (SM,GR)* |  | *5 (HR)* | *2X (SER,SLO)* | *Creative Tourism Network (CTN)* |
| *1X(MN)* |  | *3 (HR)* | *2X (SER,SLO)* | *European cultural capitals in the AI area* |
| *1X(MN)* |  | *6 (HR)* | *2X (SER,SLO)* | *EDEN sites (European Destinations of Excellence) and the EDEN network* |
| *3X(MN,SM,GR)* |  | *7 (HR)* | *2X (SER,SLO)* | *European Creative Hubs Network* |
| *1X (GR)* |  |  |  | *The Creative Europe 2021-2027, EC Program (funding opportunities) - Sustainable Development Goals of the UN 2030 Agenda (policy framework)* |

* + 1. **Is there another policy, or initiative, to be mentioned?**

CROATIA: European Agenda for Tourism 2030, COMPET 969 TOUR 78 New European Agenda for Culture and the EU Strategy for International Cultural Relations (2022/2047(INI)) All MS’ national strategies on (sustainable) tourism and culture development Sustainable Tourism Development Strategy of the Republic of Croatia

SAN MARINO: Eco sustainable tourism

BIH: All policies are noted already.

### Actions

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. **Please indicate the relevance of each Action to reflect how important it is for your country's cooperation in EUSAIR.**

|  |  |  |  |
| --- | --- | --- | --- |
| **Very relevant** | **Fairly relevant** | **Not relevant** | **Countries ranked relevance of the Actions** |
| **1X (AL)** | **1X (HR)** |  | Action 1.3: Sustainable tourism R&D for improvement of SME’s performance and growth - diversification |
| **7x (AL,SER,GR,BIH,SM,HR,****MN)** | **2X (IT,SLO)** |  | Action 1.4: AIR tourism observatory (building on INSTO methodology – International Sustainable Tourism Observatory from UNWTO) |
| **3X (SLO,MN,GR)** | **6X (AL,SER,IT,BIH,SM,HR)** |  | Action 1.5: Establishment of AIR sustainable tourism community (similar to MED sustainable tourism community) |
| **5X (AL,SER,BIH,HR,MN)** | **2X (IT,SM)** |  | Action 1.6.: Fostering Adriatic-Ionian cultural heritage. |
| **2X (AL,HR)** |  |  | Action 1.6 a: Development of sustainable thematic cultural routes |
| **2X (AL,HR)** |  |  | Action 1.8.: Upgrade of Adriatic-Ionian tourism products |

* + 1. **Are there any suggestions for reformulation/specification of the Actions provided in the initial policy paper?**

CROATIA: An open data system for collecting information from different sources (it is necessary to make a distinction between official data, e.g. data on cultural assets and unofficial free data) through a defined set of indicators at the national and regional level, taking into account the different data requirements of stakeholders

GREECE: Consideration as additional Action the cultural tourism that will include initiatives for strengthening EUSAIR Cultural Routes Network or/alternative we should keep it incooperated but clearly defined in suggested Actions 1.5 and 1.6 (tangible and intangible heritage, thematic ex. AIR diet etc.) - Cultural and Creative Industries (CCIs) as thematic also linked to cultural Tourism: CCIs challenges and Terms in the specific actions needed.

ITALY: 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. **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.**

CROATIA: “Improving accessibility for Adriatic-Ionian tourism products and services’’ – adjustment of tourism products and services in the Region to the needs of both residents and visitors with special access needs (i.e. senior groups, young people and schools, disabled people, families with low income Connection with other macroregional strategies

SAN MARINO: actions aimed at promoting sustainable and multi-country tourism

GREECE: the Strategy needs to involve more stakeholders, at local/regional level. If we aim to a Diversified tourism offer through products and services, then the local communities and authorities need to be involved as well. For the time being there is a lack of participation of stakeholders at local/regional level and this is the result of them not being aware of the beneficial outcomes the Strategy

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

SLOVENIA: Establishment of the MRS information centre (centres) for measuring the effects of tourism and for directing tourist flows.

This is about data-based decision-making. Nowadays, data is the key to better business and consequently to added value. Data-supported decision-making is also a tool for the green transition, i.e. systematic measurement and monitoring and reduction of the impacts of tourism on the environment. Destinations in the macro region would be able to plan marketing and sales activities more easily based on the information

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

### **Challenges**

* + 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.**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| ***Question/ Given answers: how many times the answer was marked*** | ***1***  ***(most important)*** | ***2*** | ***3*** | ***4*** | ***5*** | ***6***  ***(least important)*** |
| *A need for coordinated, inclusive (stakeholder engagement), place and evidence based tourism planning, management, governance and monitoring to address AIR tourism challenges* | *6X*  *(SER,GR,BIH,SM,MN,HR)* | *2X (AL,SLO)* | *1X (IT)* |  |  |  |
| *A need to reduce tourism environmental impact (efficient use of resources and pollution reduction)* |  | *1X (IT)* | *1X GR* | *3X (SLO,BIH,SM)* | *1X*  *(MN)* | *2X (AL,HR)* |
| *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)* |  | *2X (GR,SM)* | *2X*  *(SLO,MN)* | *3X (SER,HR,IT)* | *1X (AL)* | *1X (BIH)* |
| *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* | *3X (AL,IT,SLO)* | *2 (HR,SER)* |  | *2X*  *(GR, MN)* | *2X (BIH,SM)* |  |
| *Management of Short-term rental services* |  |  | *2X (BIH,SER)* | *1X (AL)* | *1 (HR)* | *3X*  *(IT,SM, MN)* |
| *A need to include Digital and green transition and resilience initiatives in established AIR sustainable Tourism community – to build an adaptation policy* |  | *2X*  *(BIH, MN)* | *3X (AL,SM,HR)* |  | *2X (IT,SER)* |  |

* + 1. **Are there any suggestions for reformulation/specification of the challenges provided in the initial policy paperwith regard to your country’s involvement in Pillar IV/Topic 2 of EUSAIR?**

CROATIA: “Improving accessibility for Adriatic-Ionian tourism products and services’’ Sustainable tourism R&D platform on new products and services

SAN MARINO: Development and support of cluste between public authorities, even outside the European Union, which jointly promote neighbouring territories. Support for the creation of tourist itineraries with integrated themes to be carried out in bike and hike mode.

GREECE: Consider to include the digital upgrade, the sustainability promotion and green transition. Consideration of challenges and opportunities linked to Topic 1 (ex.need to include Digital and green transition and resilience initiatives in Established AIR sustainable Tourism Community - adaptation policy).

ITALY: 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.

* + 1. **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.**

SAN MARINO: Development of digital applications for tourism.

BIH: All challenges are noted already.

GREECE: The challenge at EUSAIR territory is to deliver Smart and sustainable tourism management among participating m-s at very different levels of digital and sustainable development. And this is a key issue that needs to be tackled at EU level.

ITALY: 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.

### 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*

* + 1. **Are there any suggestions for its reformulation/specification? Please, consider also the different trends in tourism policy accompanying the main objective.**

SAN MARINO: Improvement of digital and smart skills

BIH: Assist with the preparation and implementation of TSA in Bosnia and Herzegovina.

GREECE: Concerning the first one: Digital transition, we should probably refer to GDPR and Chapter 5 (Transfers of personal data to third countries or international organisations). We should underline the respect on this regulation as far as private, personal data are concerned.

ITALY: 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 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.

### Key stakeholders

* + 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.**

CROATIA: Destination Management Organisations, Tourism Business Associations, Ministries of Tourism and Culture, Regional Authorities, tourism clusters, technology transfer and innovation support networks, tourism boards (i.e. Croatian Tourism Board), scientific institutions, development agencies at the regional level

MONTENEGRO: In Montenegro - Ministry of Science and Technological Development, Ministry of Ecology, Spatial Planning and Urbanism, authorities in charge of national parks and protected areas, NGO sector

International – UNWTO, etc.

SAN MARINO: Aggregations of companies in the hospitality sector, both structured and unstructured, for the performance of joint commercial and promotional actions. Companies that deal with strategic consultancy for public authorities.

Aggregations of cities from different countries or regions united by common territorial ties and roots(i.e Sustainable Tourism Development Project from Republic of San Marino, with the endorsement of the United Nations World Tourism Organisation (UNWTO) and the support of the Italian Ministry of Tourism, as a touristic network in cooperation with the Emilia-Romagna and Marche Regions and over 110 Mayors of neighbouring municipalities. Inhabitants as a key factor for rural tourism areas.

BIH:

* Tourism eco-system, policy owners, professional associations, hospitality services, chambers, TO,TA, service providers, guides
* Research institutes, universities dealing with tourism and hospitality
* National tourism boards, DMOs and DMC-s on international level i.e. ECTAA, HOTREC, …

GREECE: Added to the ones listed:

The Cultural Routes of the Council of Europe crossing AIR Network.

Cultural Routes of the Council of Europe Universities Network in AIR.

ITALY: 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.

ALBANIA: Ministry of Tourism and Environment, Ministry of Culture, National Tourism Agency, Tourism Business Associations, NGO’s, Agencies for Regional Development, Albanian Development Fund

### Relevant policies

## **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?**

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| ***Some countries ranked policies by relevance, some only marked the ones deemed most relevant*** | ***Most relevant*** | ***1***  ***(most important)*** | ***2*** | ***3*** | ***4*** | ***5*** | ***6*** | ***7*** | ***8***  ***(least important)*** |
| *Transition Pathway for Tourism, DG GROW* | *4x (AL,GR,IT,SLO)* |  |  | *1X (HR)* | *1X (SM)* |  |  |  | *1x (BIH)* |
| *EU strategy for sustainable tourism, European Parliament* | *5x (AL,IT, MN,SER,SLO)* | *1x (BIH)* | *1X (HR)* |  |  |  | *1X (SM)* |  |  |
| *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* | *3x (AL,IT,GR)* |  |  |  |  | *1x (BIH)* | *1X (HR)* | *1X (SM)* |  |
| *A European Strategy for more Growth and Jobs in Coastal and Maritime Tourism COM(2014) 086 final* | *2X (AL,SER)* |  |  |  |  | *1 (SM)* |  | *2X (BIH,HR)* |  |
| *Smart Specialisation Strategies* | *4x (AL,MN,GR,SLO)* | *1X (HR)* |  |  |  |  | *1x (BIH)* |  |  |
| *European Green Deal and related policies/initiatives Farm to Fork, Circular Economy Action Plan, New European Bauhaus…* | *6x (AL,IT, MN,GR,SER,SLO)* |  | *1x (BIH)* | *1X (SM)* |  |  |  |  |  |
| *Next Generation EU Recovery Plan* | *3x (AL,GR,SER)* |  | *1X (SM)* | *1x (BIH)* | *1X (HR)* |  |  |  |  |
| *Digitising European Industry and Digital Innovation Hubs* | *5x (AL,MN,GR,SER,SLO)* | *1X (SM)* |  |  | *1x (BIH)* | *1X (HR)* |  |  |  |

## **Is there another policy, or initiative, to be mentioned?**

CROATIA:

* New European Agenda for Culture and the EU Strategy for International Cultural Relations (2022/2047(INI))
* European Agenda for Tourism 2030, COMPET 969 TOUR 78

GREECE:

* The Creative Europe 2021-2027. EC Program. The EU Data Strategy, The European Data Governance Act, the Digital Services Act, the EU Digital Strategy.

### 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*

## **Please indicate the relevance of each Action to reflect how important it is for your country's cooperation in EUSAIR.**

|  |  |  |  |
| --- | --- | --- | --- |
| **Relevant** | **Fairly relevant** | **Not relevant** | ***Countries ranked Actions by relevance*** |
| * **1X (HR)** | * **1X (AL)** |  | Action 2.1 : Improving the quality and innovation of tourism offer and enhancing the sustainable and responsible tourism capacities of the tourism actors across the macro-region |
| * **9X (AL,SLO,SER,IT,GR,BIH,SM,HR,MN)** |  |  | Action 2.2: Coordinated policies, management and funding |
| * **1X (MN)** | * **8X (AL,SLO,SER,IT,GR,BIH,SM,HR)** |  | * Action 2.3: Promotion of AIR destinations on world markets |
|  | **2X (AL,HR)** |  | Action 2.4: Facilitating access to finance for new innovative tourism products start-ups |
| **8X (AL,SLO,SER,IT,GR,SM,HR,MN)** | **1X (BIH)** |  | Action 2.5: Training and skills for tourism |

## **Are there any suggestions for reformulation/specification of the Actions provided in the initial policy paper.**

CROATIA:

* Education, training and skills curricula development for smart destination management and special interest tourism providing sustainable destinations & new jobs
* Destination Management strategic approach and planning for sustainable tourism in overcrowded as well as in less developed, remote destinations
* Harmonized distribution of tourism flows through sustainable management of cultural routes in macro-regional territories and distribution of innovative diversified MRS tourism products
* Digitalization in terms of smart, participative and agile destination management
* Upgrading tourism ecosystem through responsible destination management planning

GREECE:

* The enhance of the skills of tourism professionals and workers/ Education should be used as a term versus “training”.
* Coordination policies to include cultural tourism linked to Cultural heritage and Creative Industries Linked also to AIR Cultural Routes (flagship and EUSAIR CRs Network),
* Institutional capacity building on macro-regional tourism destination management (inter-macro regional Local authorities cooperation, common tourism market products promotion strategy etc.).

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

## **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.**

## SAN MARINO: Exchange and transaction between countries of national network expertise

GREECE: The engagement of the policy makers has to be ensured. Workshops, webinars on this topic should be held with the participation of the policy makers of the m-s in order to engage them in the implementation of the objectives of the Strategy. Raising the awareness on the overall scope of EUSAIR could increase the efficiency of the Strategy.

ITALY: 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.

## 

## Prioritization of Actions

* + 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).***

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| ***HR*** | ***MN*** | ***SM*** | ***BIH*** | ***GR*** | ***IT*** | ***SER*** | ***SLO*** | ***AL*** | ***Countries ranked Actions by relevance*** |
| 3 |  |  |  |  |  |  |  | 6 | Action 1.2: Initiative to improve quality for sustainable tourism offer |
| 4 |  |  |  |  |  |  |  | 5 | Action 1.3: Sustainable tourism R&D for improvement of SME’s performance and growth - diversification |
| 11 | 4 | 6 | 5 | 2 | 5 | 2 | 4 | 8 | Action 1.4: AIR tourism observatory |
| 7 | 5 | 4 | 6 | 3 | 3 | 1 | 3 | 10 | Action 1.5: Establishment of AIR sustainable tourism community |
| 6 |  | 3 | 2 |  | 2 | 3 |  | 3 | Action 1.6: Fostering Adriatic-Ionian cultural heritage |
| 5 |  |  |  |  |  |  |  | 4 | Action 1.6 a: Development of sustainable thematic cultural routes |
| 8 |  |  |  |  |  |  |  | 9 | Action 1.8.: Upgrade of Adriatic-Ionian tourism products |
| 10 |  |  |  |  |  |  |  | 7 | Action 2.1 : Improving the quality and innovation of tourism offer and enhancing the sustainable and responsible tourism capacities of the tourism actors across the macro-region. |
| 1 | 1 | 1 | 3 | 1 | 1 | 4 | 2 | 1 | Action 2.2: Coordinated policies, management and funding |
| 12 | 3 | 5 | 4 | 5 | 6 | 5 | 5 | 12 | Action 2.3: Promotion of AIR destinations on world markets |
| 9 |  |  |  |  |  |  |  | 11 | Action 2.4: Facilitating access to finance for new innovative tourism products start-ups |
| 2 | 2 | 2 | 1 | 4 | 4 | 4 | 1 | 2 | Action 2.5: Training and skills for tourism |

## Other challenges and Actions

* + 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.**

## SAN MARINO: development of relations through panels or conferences also at bilateral level

GREECE:

- Consideration as additional Action the cultural tourism that will include initiatives for strengthening EUSAIR Cultural Routes Network or keep cultural tourism in cooperated but clearly defined in suggested Actions 1.5 and 1.6 (tangible and intangible heritage, thematic ex. AIR diet etc.)

- Cultural and Creative Industries (CCIs) as thematic also linked to cultural Tourism in Actions 1.5 and 1.6: CCIs challenges and Terms in the specific actions needed

ITALY: 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.

SLOVENIA: Development of niche tourism for deseasonalization in MRS (outdoors, gastronomy, culture, inclusion of the local population) - Establishment of the MRS information center (centres) for measuring the effects of tourism and for directing tourist flows (more info in 1.5.3) - Local level incentives to invest in tourism (dedicated use of the tourist tax) – promotion in all MRS region - Finding key factors/problems (labor shortage, migration, resettlement...) - Digitization in tourism and culture (tourist offer, reservations...) - to ensure a more even development in MRS - Development of skills in tourism, proposal for an annual forum of educational institutions and young people (encouraging young people in an interesting / attractive way to pursue careers in tourism; promotion of careers in catering and tourism) in cooperation with relevant international institutions (UNWTO…).

## EUSAIR governance

* + 1. **Please comment on your experience of engaging with TSG4 or EUSAIR in general in terms of its effectiveness.**

CROATIA: Significant efforts were made in the previous period and the governance system is well established. All relevant stakeholders are involved.

SAN MARINO:

San Marino has only joined EUSAIR since the beginning of 2022. We appreciated the level of detail on the main issues, but we are not yet in a position to be able to express ourselves on the terms of the effectiveness of the interventions.

BIH: Our experience so far has been great, EUSAIR Steering group has done a remarkable job concerning the development of new policies, plans and actions. We see the EUSAIR as an opportunity for non EU countries to reach their goal in approaching the EU standards and instruments in tourism and culture.

ITALY: 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.

ALBANIA:

It has been a great experience and an opportunity to better understand the sustainable development process, identifying common challenges and deciding on common objectives, identifying the priority actions etc. From the prospective of Albania we have noticed improvement on the way how to analyse the industry, how to establish the right policies and above all how to better cooperate on a regional level with EU member and non-member countries.

* + 1. **Do you have something to suggest in terms of improving the functioning of TSG4 or EUSAIR in general?"**

CROATIA: We should continue to monitor and evaluate the development of sustainable tourism according to the established system of indicators.

BIH: Everything is functioning very well so far.

ITALY: 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.

ALBANIA: We should continue the cooperation process at policies level and showing better to the stakeholders the relevance of this joint process, on common challenges, goals and priority actions, to the concrete results.

1. For now the titles of the topics remain the same, they will be revised according to the newly agreed objectives and actions. [↑](#footnote-ref-1)