



**"EU Strategy for the Adriatic and Ionian Region – pillar IV, report/analysis of the EUSAIR national tourism strategies for identifying common priorities and actions in relation to the EUSAIR action plan-pillar IV: "sustainable tourism".
Defining relevant EUSAIR macro-regional mid-term tourism result indicators and targets".**

Executive Summary



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Table of the content

I.LOGICAL FRAMEWORK.....	2
II.OVERALL GENERAL OBJECTIVES.....	2
III. METHODOLOGY FOR THE ASSESSMENT.....	3
IV.BASKET OF COMMON JOINT PROPOSALS/ACTIONS WITH A MACRO REGIONAL DMENSION....	4
V.THE WAY AHEAD: TOWARDS CLEAR RESULTS AND DELIVERABLES	6

To travel is to discover that everyone is wrong about other countries.

ALDOUS HUXLEY

I. LOGICAL FRAMEWORK

The present Analysis/Report, to be considered as a '*live document*', aims at supporting the implementation of Pillar IV 'Sustainable tourism', in the framework of the EUSAIR Action Plan and it is composed **by 3 parts**, as briefly explained below:

The **First part** of the report refers to the analysis **of the 8 national tourism strategies** of the EUSAIR countries, including the regional tourism strategies (for Italy and Greece) and only on the entity level for Bosnia and Herzegovina, also taking into account the international and European tourism policy context. The methodology used for the **overall assessment of each individual national tourism strategy** both for EUSAIR Member States and for IPA countries, is based on a set of **common criteria** which reflect and address the similar issues raised during the analysis, allowing in the same time a comparison among them. As final step, **up to 6 main tourism priorities**, in line with the priority actions of EUSAIR Pillar IV, have been selected.

The **Second part** of the report/analysis is focused on the **common priorities detected by the national tourism strategies versus the EUSAIR Action Plan**, including additional priorities coming from the assessment of the national/regional tourism strategies, which have been shared with the Pillar IV TSG members¹ and during the meetings with the Italian and Greek Regions. As a follow up of this participatory process, a **set of common joint proposals/actions with a macro regional dimension**, which can be implemented in a short term by the interested EUSAIR countries/regions, has been listed in the report second part.

The **Third part** focuses on the importance of **monitoring and continuously measuring the macro regional impact**, providing **baselines and specific target achievements** in mid- term perspective and results indicators to be set in quantitative and qualitative terms. Together with recommendations, it has been proposed a **list of relevant and well measurable mid-term result indicators and targets** for possible inclusion in the EUSAIR Action Plan, for the Pillar IV 'Sustainable tourism'.

II. OVERALL GENERAL OBJECTIVES

The **main objective** of the report/analysis is to understand to what extent **the common national tourism priorities**, including the regional level, are in **line with the EUSAIR Action Plan** and to identify at **list up to 6 common tourism priorities** valuable for all the involved countries, taking into account the need to include additional tourism priorities (3 have been selected).

¹ Thematic Steering Group composed by the representatives of the Ministries of Tourism of the 8 EUSAIR countries

Another relevant objective is to **provide a basket of possible joint initiatives/proposals** with a macro regional dimension, coming from the national and regional level with a participatory and inclusive approach, also **identifying relevant mid-term results indicators and targets**, to ensure efficient monitoring and follow up of the activities year by year.

III. METHODOLOGY FOR THE ASSESSMENT

The **methodology** used for making the analysis of the **8 national tourism strategies** of the EUSAIR countries including the regional level (for Italy and Greece), and only at entity level for Bosnia and Herzegovina, took into account several issues related to the international and European tourism (and cultural) policy framework, the complementarities with previous and existing EU macro regional strategies, such the Danube and Alpine region, as well as the synergies and operational interaction with European and international organizations/networks, fostering regional cooperation.

On the other hand, besides the individual assessment of each national tourism strategy, in order to make possible the comparison between the 4 Member States (Croatia, Greece, Italy and Slovenia) and the 4 IPA countries (Albania, Bosnia-Herzegovina, Montenegro and Serbia), a set of **common evaluation criteria** has been used and **scored within a matrix table**. Regarding the analysis of the **regional tourism strategies**, due to the high number of Regions involved, the assessment has been done not individually but using a **common set of evaluation criteria**, shared and approved by the Regions and considered by them as a model of survey.

The **logical framework** behind the overall analysis/report, had to take into consideration the new role of macro regions in the EU cohesion policy post 2020 and territorial Cooperation, the **value added of macro regional strategies for projects and for funding programs** and the potential of EUSAIR in the framework of the neighborhood policy, IPA and Western Balkans assistance. In addition, the complementarities with **other EU sectoral policies** have been highlighted, including the EU strategy for more growth and jobs in coastal and maritime tourism and synergies with existing initiatives on sustainable tourism, such as the **Mediterranean Strategy for sustainable development** or experiences with **Smart specialization strategies**.

As for the importance of **monitoring and continuously measuring** the macro regional impact, the monitoring system would focus on the contribution of the EUSAIR to the development of the Adriatic and Ionian Region. This could include information on **projects, intervention logic and governance changes**.

The overall implementation of the **EU Strategy for the Adriatic-Ionian Region**, will be monitored at **three levels: (1) Governance structure (2) Defining the targets for each priority actions, within the 4 thematic pillars (3) result indicators**.

In the framework of EUSAIR **Pillar IV 'Sustainable tourism'**, the **2 main topics and 6 priority actions (including a cross cutting issues)**, with additional **3 possible priorities** as identified from the analysis/report (second part), represent the starting point for setting up the **baseline data and defining the specific targets**. On the basis of the above mentioned baselines, a **list of possible 10 quantitative (numerical) and 9 qualitative (descriptive) results indicators**, is proposed in the Report/Analysis (third part):

IV. BASKET OF COMMON JOINT PROPOSALS/ACTIONS WITH A MACRO REGIONAL DIMENSION

In order to raise ownership, it is advised that the 8 countries select and carry out one activity listed below within the 8 topics. Therefore, in the first instance **8 activities** could be launched.

The following list of joint proposals/actions, with a macro regional dimension, is divided by **8 topics**, and each topic is divided in activities, such as:

1. Promotional activities

- ⇒ Development of a **package of EUSAIR tourist products, to be promoted in China**, in view of 2018 the EU Year of China;
- ⇒ Establishment of the **EUSAIR tourism Agency**, composed by the staff from the 8 participating countries for the marketing promotion of the Adriatic and Ionian macro region, to be considered as a sustainable and responsible tourism destination;
- ⇒ Development of a unique **EUSAIR brand** () maybe taking into account the proposal made by the Forum of the Adriatic and Ionian Chambers of Commerce, regarding the ADRION logo², which has been already registered at international level and the copyright belongs the AIC Forum of Adriatic Forum

2. Measuring and monitoring sustainable tourism

- ⇒ Explore the possibility to establish also within the Adriatic and Ionian Macro Region area, the **INSTO (International Sustainable Tourism Observatories)** endorsed by UNWTO. INSTO was recently established in Croatia and could become a model and driver also for the other EUSAIR countries;
- ⇒ Capitalizing the successful experience of some **ETIS³ awarded Croatian, Slovenian, Italian and Montenegro destinations**, in order to share the good practices for measuring the impact and collecting data on sustainable tourism and to expand the number of ETIS destinations within the EUSAIR territory;

3. Skills and vocational training

- ⇒ Developing multilingual training courses and establishing a **Master program on tourism management, hospitality and services**, sharing the same methodologies and approaches, within the EUSAIR countries;
- ⇒ Follow the model (in terms of replicability) of the **e-Capital culture master** (2 editions already organized by Marche Foundation in Ancona during 2014-2016), for the **spin-off of young entrepreneurs**;

² The Adrion brand, has been clearly mentioned in the European Commission Communication (2012) 713 final "A Maritime Strategy for the Adriatic and Ionian Seas", and it can represent a tourism marketing tool for the entire South-East Europe, aiming at reinforcing the international visibility and competitiveness of the Adriatic-Ionian Area as a single tourist destination and at fostering transnational cooperation and intercultural dialogue based on tourism among EUSAIR countries.

³ European Tourism Indicator System, a toolkit developed by the European Commission, since 2013.

4. Governance and capacity building

- ⇒ Foster capacity building regarding the **Destination Management Organizations**⁴ - DMO, from EU Member States towards IPA countries
- ⇒ Organize **Annual DMO Forum**, also in the EUSAIR context
- ⇒ Community **LED Local Development** (CLLD) approach aiming at fostering the local level of the territorial integrated development

5. Cultural tourism and local identity

- ⇒ **Be involved in the European Parliament Preparatory Action on cultural heritage**, which aims at developing i) a large-scale project that integrates **UNESCO** recognized outstanding cultural heritage into a consumer friendly platform and ii) a **series of thematic routes for sustainable tourism development across Europe;**
- ⇒ **The mapping of the existing routes certified by the Council of Europe, as well as the exploration of new thematic cultural routes relevant for EUSAIR.** The project focuses on the creation / development of four European Cultural Routes potentially combining world heritage sites, underwater sites and/or intangible heritage.
- ⇒ Establishment of networks based on thematic tourism already existing in the countries

6. Innovation, ICT and digital agenda

- ⇒ Creation of a '*digital ecosystem of culture and tourism*', with the participation of all stakeholders
- ⇒ Development of a **standardized ICT platform** digitalization of the tourist services
- ⇒ Development of an **EUSAIR smart specialization** network for tourism and cultural issues

7. Link between cultural tourism and creative industries

- ⇒ **Establishing an EUSAIR Film Commission**
- ⇒ **Creating Art Networks** (such as, music and fashion festivals, theater, art exhibitions; museums, archeological sites)
- ⇒ **Setting up an EUSAIR cluster for sport tourism initiatives and competitions**

8. Access to financing

This a topic that can be carried out simultaneously by all the countries and the European Commission could help. Some of the relevant activities are listed below (not exhaustive list).

- ⇒ Access to European Structural and Investment Funds - ESIF 2014-2020
- ⇒ Access to direct management funds (such as COSME, Horizon2020, Creative Europe, LIFE, Erasmus + and Erasmus pro)
- ⇒ Access to international financial institutions

⁴ DMO is an **organisation** composed by **public or public-private entity** whose aim is to foster, plan and coordinate the tourism development of a **destination** as a whole and which coordinates the many constituent elements of the tourism product and it provides visitor services and the necessary information structure to market the **destination** in a most democratic way to enhance residents' well-being

V. THE WAY AHEAD: TOWARDS CLEAR RESULTS AND DELIVERABLES

Ensuring EUSAIR implementation with **concrete deliverables and milestones**, requires **measurement of impact results** in the Adriatic and Ionian Region.

What perhaps still needs to be addressed is TRUST on what has been performed. It seems hard to find quickly a success story, identifying the ownership and the responsibilities.

The issue of TRANSPARENCY, in terms of clearly defined mandates, structure of the management and involvement of key implementers, seems to be missing;

Considering the complexity of the territory, especially with a macro regional dimension, which implies **defined deliverables and results based evaluation**, the level of INVOLVEMENT of the population seems also quite low.

These challenges can be addressed through a COLLABORATIVE INTERACTION among the 8 EUSAIR countries, with a **bottom up and inclusive approach** (people to people and a win-win solution).

A clear long term VISION is required, especially at political level, in order to ensure step by step the development of the transnational cooperation among all the involved countries, the regions and other key stakeholders and the concrete implementation of the EUSAIR Action Plan, including common **projects and joint actions-processes**, particularly with regard to **sustainable tourism**.

COMMUNICATION is another very important factor which can produce a high level of dissemination of the EUSAIR and of its deliverables in the future.

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