



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

Monitoring and Evaluation Report

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Final Evaluation Report

- Overview of sustainable tourism theoretical framework
- Sustainable tourism in European Union strategic documents and points out
- Recent data according to developed indicators
- First insight for the evaluation of the EUSAIR Pillar 4

EUSAIR Monitoring and Evaluation System

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

Socio-economic indicators

- **Population** – decreased
 - **GDP p/c** – increased
 - **Global Competitiveness Index** – increased
 - **Employment rate**
 - **Unemployment rate**
 - **Youth unemployment rate**
 - **People at risk of poverty** – decreased
 - **Human Development Index** – increased
- Decreased in 2020,
began to recover in
2021

Context indicators (MRS.ESPON)

- **Tourism direct contribution to GDP**
 - **Jobs in tourism industries**
- Decreased in 2020,
began to recover in
2021
- **Number of UNESCO World Heritage Sites** – 104 in 2018, 105 in 2019, 111 in 2021

Output indicators

- **Interregional investments in EUSAIR Pillar 4 related projects**
– 313 projects, total budget EUR 689,85 million
- **Supported transnational cooperation networks – 18**
- **Innovation – 88 out of 313 projects introduce innovations**

Result indicators (1)

- **Number of arrivals**
- **Number of nights spent at hotels and similar accommodation establishments**
- **Relative contribution of tourism to the destination's economy**
- **Total spending of overnight tourists**
- **Number of bed places in hotels and similar accommodation establishments – mostly stable**

Decreased in 2020,
began to recover in 2021

Result indicators (2)

- **Spending of same day visitors – decrease in 2020**
 - **Occupancy rate in commercial accommodation per month and average for the year**
 - **Direct tourism employment as a percentage of total employment in the destination**
 - **Intensity of greenhouse gas (CO2) emissions into the air from tourism**
 - **Travel & Tourism Competitiveness Index – Environmental Sustainability – increase in rank**
- Decreased in 2020,
began to recover in 2021

Impact indicators

- **Strategies and action plans developed in the field of natural and cultural heritage and tourism**
- **Joint tourism products developed and promoted – 76**

Governance indicators

- Attendance of TSG 4 meetings and project ideas

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

Cross-pillar indicators

- **Innovation effects** – older members moderate innovators, Croatia and non-EU countries emerging innovators
- **Employment rate** – Decreased in 2020, began to recover in 2021
- **Supported transnational cooperation networks** – only Pillar 4 – 18

Conclusion (1)

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

Conclusion (2)

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

Thank you!

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