Unlocking Tourism Potential of the Adriatic-Ionian Region through Seamless Transnational Connectivity

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Head of Laboratory D2: Technologies and Tools for Touristic Development

HELLENIC INSTITUTE OF TRANSPORT
CERTH / HIT

EUSAIR Pillar 2 Transport: Connectivity as a Vital Tool for Tourism Development

Why Connectivity Matters for Tourism?

Tourism is the lifeblood of many Adriatic-Ionian communities, but without efficient, sustainable transport, dreams of growth are stranded at the border.

Still Fragmented Mobility in a Shared Area with a high tourism potential

back in 2014...

Infrastructure & Investment Deficiencies
"Permanent under-investment in infrastructural capacities has increased travel times and, due to inadequate hub connections, makes it difficult to harmonize timetables."

Declining International Services
"The permanent decrease of international train numbers, along with falling service quality, reflects a broader decline in cross-border rail viability in South East Europe."

Financial & Political Constraints
"Without PSO support, railway operators are left in an unenviable position—facing high operational costs that cannot be covered by revenue alone."

Governance & Coordination Gaps
"While timetable harmonization processes are standardized, political, financial, and infrastructural barriers still prevent effective cross-border rail coordination."

Call for Systemic Change
"Only systematic - not declarative - investment in infrastructure, fee reductions, and financial support will improve the effectiveness and competitiveness of railway transport."

back in 2020...

Limited Multimodal Connectivity
"Multi-modal transport is little developed in the ADRION region—fragmented links, poor coordination, and weak integration with tourism flows persist."
Interoperability and Infrastructure Gaps
"Much should be done at the rail network level—harmonized procedures, timetables and interoperability issues must be urgently addressed."
High Cost, Low Efficiency
"Maritime and rail services present high trip durations and comparatively high costs, making them unattractive even for sustainability-minded travelers."
Low Attractiveness of Public Transport
"Air and car travel dominate user choices—rail and maritime options are seen as slow, inflexible, and costly."
Information and Ticketing Gaps
"A single ticket for railway and maritime transport is perceived by travelers as a good idea—current systems are fragmented, discouraging intermodal journeys."
Governance and Coordination Failures
"Many of the infrastructure and implementation challenges stem from governance and coordination failures, not technical limitations."
Sustainability and Tourism Dependency
"To unleash tourism's economic potential, ADRION must develop multimodal systems offering convenience, reliability, and ecological compatibility."

back in 2021...

back in 2022...

Uneven Connectivity and Infrastructure Quality
"Substantial differences in road, rail, and maritime infrastructure persist, resulting in uneven connectivity across the ADRION region."
"While some areas benefit from strong port or airport connectivity, others are underserved by public transport, with reduced services and poor frequency."

Transport Not Meeting Tourism Needs
"Tourist traffic is mostly car-based; public transport is inflexible, costly, and hard to navigate - especially in cross-border settings."
"Despite strong touristic demand, transport services and tourism products remain uncoordinated. No consistent vision exists to serve short-haul or domestic travel better."

Low Digital Integration, Weak Data Utilization
"Apps provide GPS and cycling info, but lack integration with practical services like schedules, tickets, accommodation or cultural passes."
"ICT tools fail to support seamless experiences or gather usable feedback loops from tourists. Their value is constrained by limited stakeholder collaboration and fragmented design."

back in 2023...

Tourist Needs Related to Mobility and Connectivity
1. Sustainable and Accessible Mobility
"Making tourism - especially cultural tourism - more accessible requires both structural investments and innovative services for sustainable mobility."
"Improved public transport coverage, micromobility, and walking/cycling infrastructure are considered essential to restore sustainable development in tourism."
2. Digital Access to Tourism and Transport Services
"Digitalisation is a top priority - tourism must be supported with digital infrastructure, skills development, and interactive online services that inform and guide travelers."
"The tourism sector must digitize its offerings and interfaces - mobile smart apps, contactless ticketing, pre-information systems in historical sites - all improve the tourist experience and reduce barriers to mobility."
3. Inclusive Travel Planning and Product Customization
"Tourism must diversify and customize its offers - visitors increasingly expect flexible bookings, mixed transport modes, and personalized cultural experiences."
"Safe tourist corridors and better transport-tourism integration are needed to support recovery in case of future disruptions."
4. Weak Transport-Tourism Integration
"Tourism and transport sectors often operate in isolation - there is an urgent need for more cooperation between hospitality providers and mobility planners."
"Cooperation with businesses is key to creating integrated tourism and transport packages in line with pandemic-era protocols and evolving travel behavior."
5. Need for Structural and Strategic Coordination
"The recovery of the tourism sector cannot rely on restarting past activities alone - it requires innovation, new partnerships, and strategic mobility solutions."
"Regional and local public authorities must collaborate vertically and horizontally to plan infrastructure and services that align with tourism demand."

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Programme co-funded by the EUROPEAN REGIONAL DEVELOPMENT FUND

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European Regional Development Fund - Instrument for Pre-Accession II Fund
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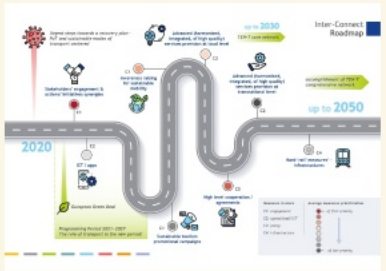

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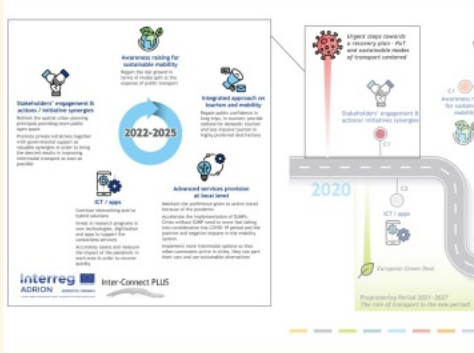

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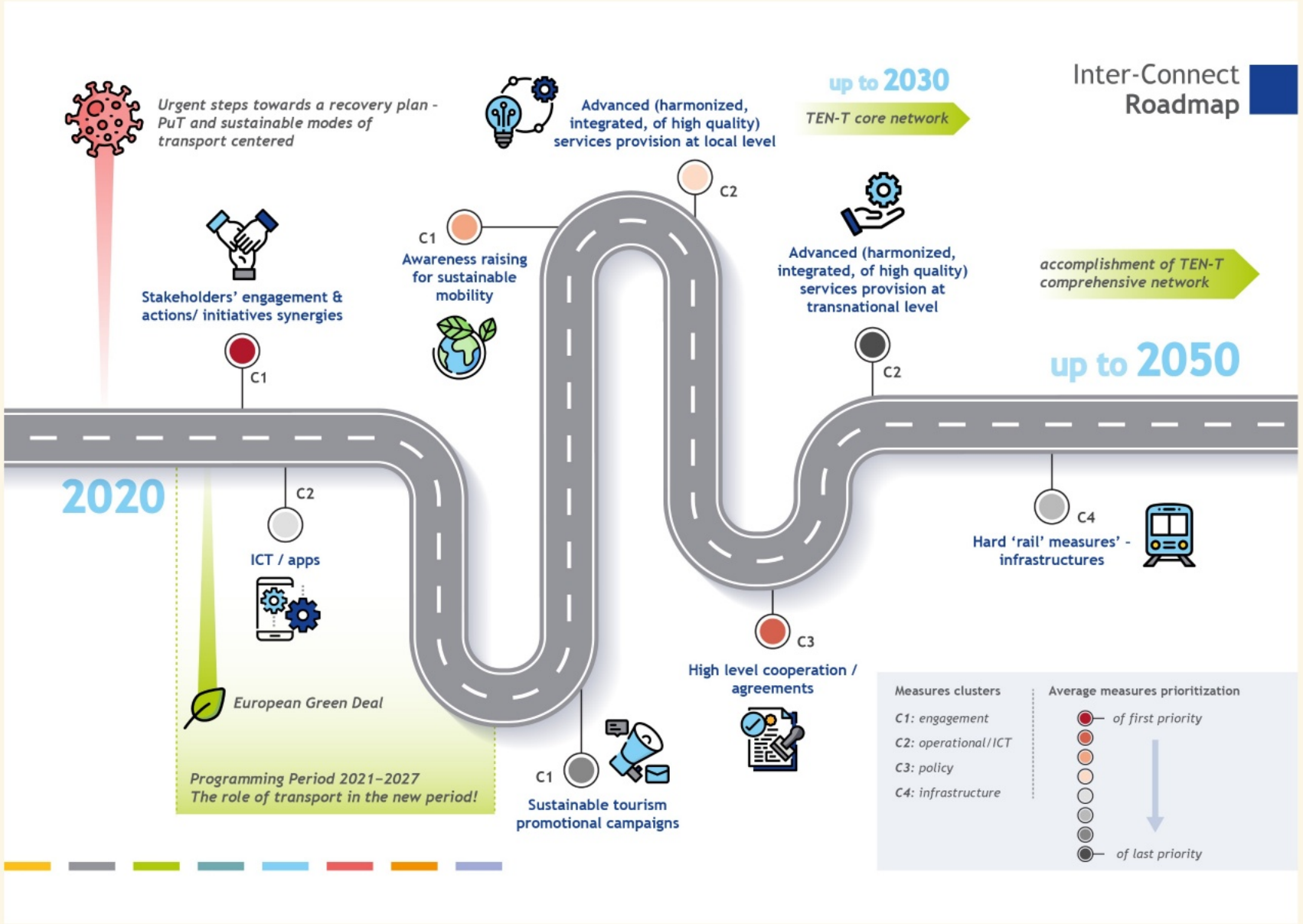

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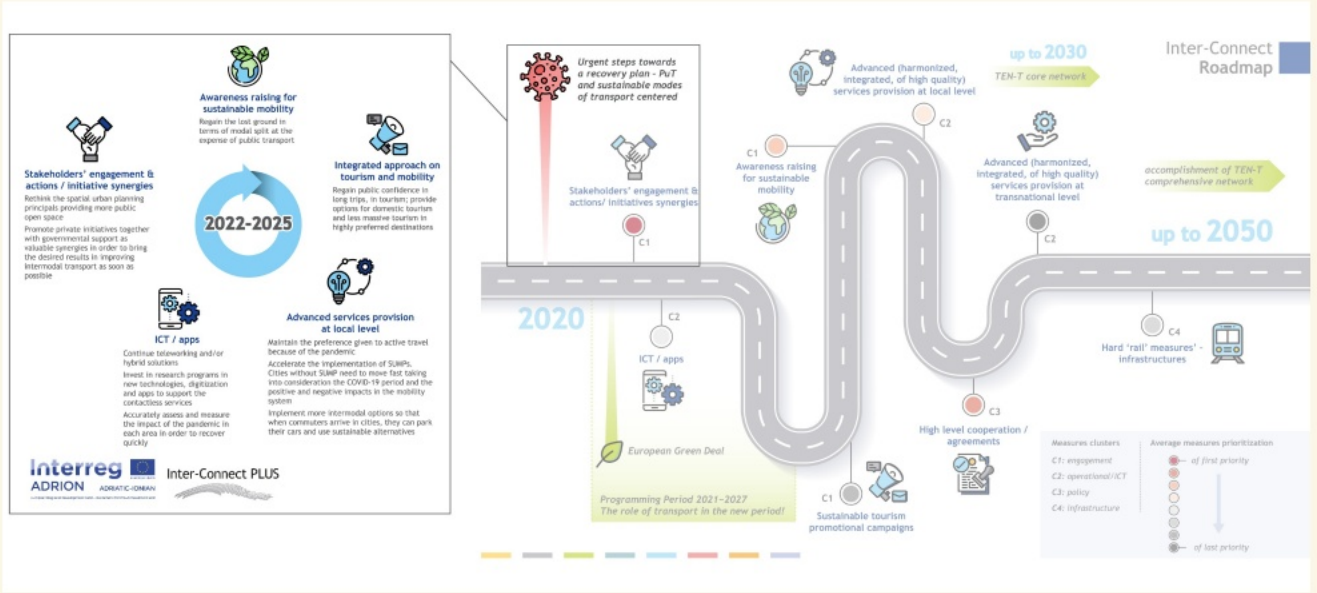
Inter-Connect PLUS



Awareness raising for sustainable mobility

Regain the lost ground in terms of modal split at the expense of public transport

Stakeholders' engagement & actions / initiative synergies

Rethink the spatial urban planning principals providing more public open space

Promote private initiatives together with governmental support as valuable synergies in order to bring the desired results in improving intermodal transport as soon as possible

Integrated approach on tourism and mobility

Regain public confidence in long trips, in tourism; provide options for domestic tourism and less massive tourism in highly preferred destinations

2022-2025

ICT / apps

Continue teleworking and/or hybrid solutions

Invest in research programs in new technologies, digitization and apps to support the contactless services

Accurately assess and measure the impact of the pandemic in each area in order to recover quickly

Advanced services provision at local level

Maintain the preference given to active travel because of the pandemic

Accelerate the implementation of SUMPs. Cities without SUMP need to move fast taking into consideration the COVID-19 period and the positive and negative impacts in the mobility system

Implement more intermodal options so that when commuters arrive in cities, they can park their cars and use sustainable alternatives

Interreg ADRION ADRIATIC-IONIAN
European Regional Development Fund - Instrument for Pre-Accession II Fund

Inter-Connect PLUS

Urgent steps towards a recovery plan - PuT and sustainable modes of transport centered

Stakeholders' engagement & actions/ initiatives synergies

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mobil

2020

C2

ICT / apps

European Green Deal

Programming Period 2021–2027

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back in 2022...

Interreg ADRION ADRIATIC-IONIAN
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SUSTOURISMO

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2024 - 2027

Interreg Europe
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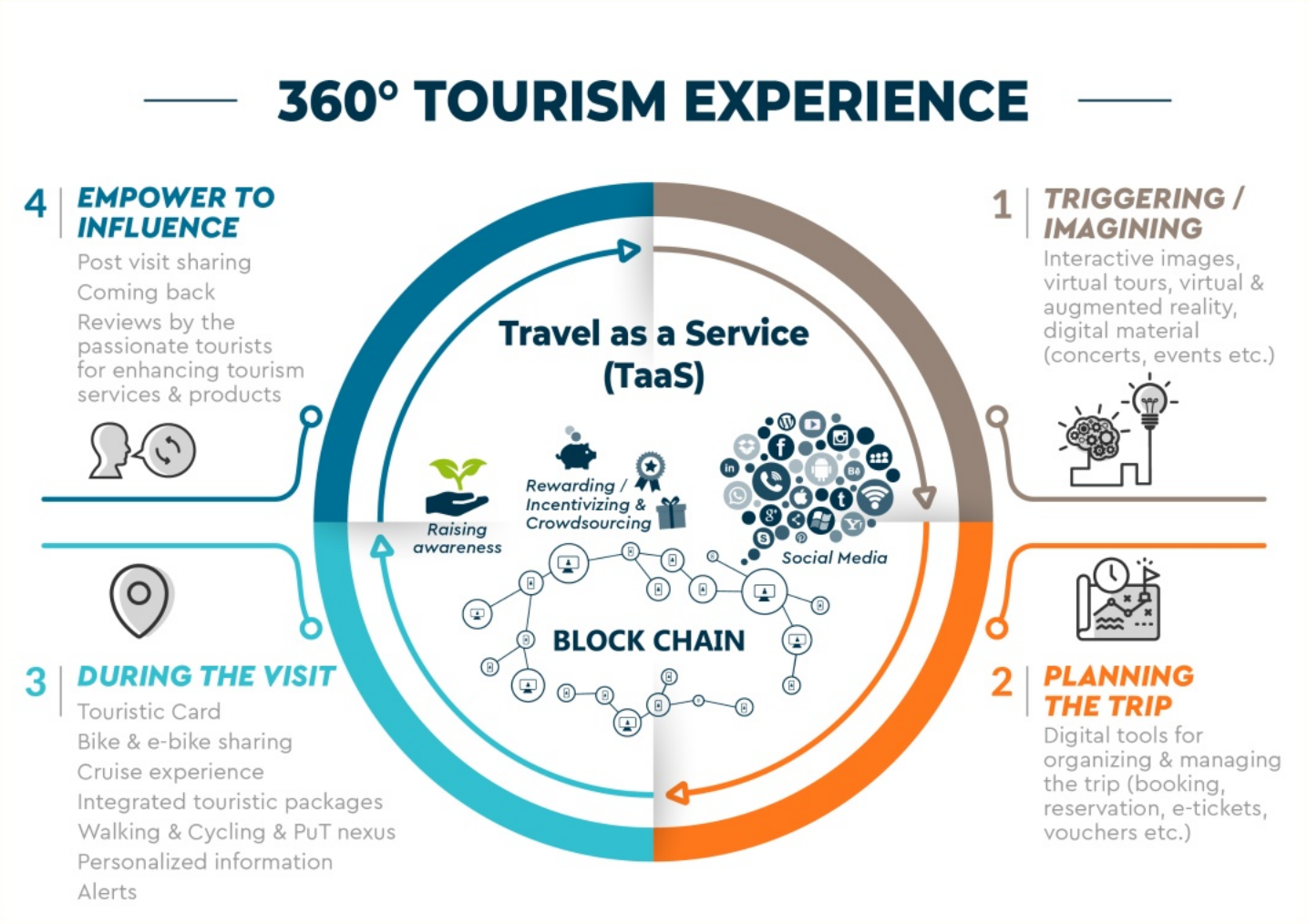
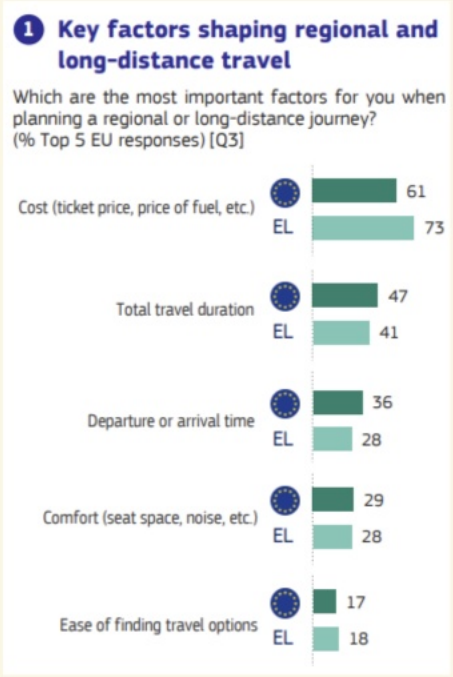
TAAS





Recurring Themes at EU level too...

- Lack of real-time info or search tools for combined transport
- Separate ticketing increases cost, risk, and confusion
- Booking complexity discourages users, even when options exist
- Mismatch of priorities: travelers want affordability, convenience, comfort, and one-click simplicity.

Tourism Through the Eyes of a Traveler - Meet Evgenia

... involve me in proposals making just for a day ...

Name: Evgenia
Origin: Thessaloniki, Greece
Goal: Explore cultural sites & natural beauties from Thessaloniki to Trieste

Pain Points:

- She cannot meet rest ADRION countries by rail from Greece - there are no international railway connections... Even in the rest countries, rail transport is unevenly present and there are still weak points!
- Maritime connectivity is hours-consuming!
- It seems hard to her to find the necessary information, no single info point exists
- She can still see delays in border crossings
- Transport hubs - hinterland accessibility is still a problem too!
- Car is dominating the intra-city/areas transportation!
- e-tickets/ MaaS are not the case!

"I got a puzzle!"

Evgenia represents the million travelers who seek seamless travel within ADRION area.

Table 6. International tourist arrivals (1.000) 2019-2021

Country	2019	2020	2021
Albania	5,919	2,521	5,340
Bosnia and Herzegovina	1,198	197	501
Croatia	17,353	5,545	10,641
Greece	31,348	7,374	14,705
Italy	64,513	25,190	26,888
Montenegro	2,510	351	1,554
North Macedonia	758	118	294
San Marino	111	58	94
Serbia	1,847	446	871
Slovenia	4,702	1,216	1,832
Total	*130,259*	*43,016*	*62,720*

Source: UNWTO (2023a) World Tourism Barometer, Statistical Annex. Volume 21, Issue 1.

Italy has the highest share in international tourist arrivals in EUSAIR region (43%), Greece follows with 23%, Croatia with 17% and Albania with 9%.

More Than Mobility: Building Prosperity and Unity

Call to Action

- Focus first on accessibility gaps - areas rich in culture and nature but invisible on the tourism map due to poor road, rail, or port access.
- Invest in transport digitalization - not just for efficiency, but to connect tourists with services, stories, and sustainable choices.
- Tackle overtourism by designing balanced itineraries that guide visitors toward lesser-known treasures, spreading benefits and reducing pressure.
- Actively listen to the trials, pilots, and lessons already underway through cross-border Interreg, transnational projects like IPA ADRION, and initiatives as ADRION thematic cluster; scale what works, fix what doesn't.

EU Strategy for Adriatic and Ionian Region - EUSAIR

Pillar 4: SUSTAINABLE TOURISM

Main topics according to EUSAIR Action Plan:

- **DIVERSIFIED TOURISM OFFER**
- **SUSTAINABLE AND RESPONSIBLE TOURISM MANAGEMENT**

EUSAIR Flagships 2021 - 2027

Research & development for improvement of sme's performance and growth-diversification

01

- CulTourAIR - Survey on cultural tourism demand in Adriatic-Ionian Region
- ADRIONCYCLETOUR - ADRiatic-IONian CYCLE route for sustainable TOURism - Collaboration between Pillar 2 (Transport subgroup) & 4

Training and skills in the field of tourism businesses (vocational and entrepreneurial skills)

02

- DES_AIR - Education for Integrated Sustainable Tourism Destination Management
- ADRIONet - Managing Tourism Flows in Protected Areas - Collaboration between Pillar 3 & 4

Development of the network of sustainable tourism businesses and clusters Green mapping for the A-I region - supporting development and market access for responsible and sustainable tourism destinations (management) and micro/sme operations in the EUSAIR region

05

- TG AIR - Green Mapping for the Adriatic-Ionian Region - Supporting Development and Market Access for Responsible and Sustainable Tourism Destinations and Micro/SME Operations in the EUSAIR Region
- Air ProDest Strategy (MIQS) - Adriatic-Ionian Strategy and Solutions for Smart Integrated Destination Management based on Multiple Intelligence Systems
- LIVING THE SEA 4.0
- BLUECULTURE - Development of Macro-Regional Cluster on BlueCulture Technologies and creation of International Competence Center - Collaboration between Pillar 1 & 4
- STETAI - Sustainable Tourism through Environmental Energy Technologies in Buildings of High Architectural Interest - Collaboration between Pillar 2 (Energy subgroup) & 4

Expanding the tourist season to all-year round

03

- CruiseAir - Destination Management Plans ' preparation for Cruise destinations within the Adriatic-Ionian Region

Development of sustainable and thematic cultural routes/connecting cultural routes in EUSAIR

04

- AIR Cultural Routes - Adriatic-Ionian Region Cultural Routes Tourism Governance Model: An Opportunity for the EUSAIR Area

01-05 EUSAIR flagships
There are 4 strategic formats for implementation of EUSAIR flagships:

- **EUSAIR strategic projects**
  Defined set of tasks which must be completed in order to arrive at a particular goal or outcome foreseen in the Flagship.

- **EUSAIR cross-pillar strategic projects**
  These are strategic projects aimed at implementation of Flagships in the topics of different Pillars.
- **EUSAIR master plans**
  A master plan is a dynamic long-term planning document that provides a conceptual layout to guide future growth and development in the field.
- **EUSAIR actions**
  A list of tasks that need to be completed before a strategic project is being developed.

Contact info: Ministry of Tourism and Sport of the Republic of Croatia, eusair@mints.hr, www.adriatic-ionian.eu

EU Strategy for Adriatic and Ionian Region - EUSAIR

Pillar 2: CONNECTING THE REGION

Main topics according to EUSAIR Action Plan:

- **MARITIME TRANSPORT**
- **INTERMODAL CONNECTIONS TO THE HINTERLAND**
- **ENERGY NETWORKS**

EUSAIR Flagships 2021 - 2027

The Adriatic-Ionian multi-modal corridors

01

- AIM-TI - Maritime dimension - Adriatic-Ionian Region Masterplan for Transport Interconnectivity – Maritime dimension
  Pre-feasibility studies within AIM-TI - Maritime dimension: Multimodal Corridor VIII
- AIM-TI – Land and air accessibility - Adriatic-Ionian Region Masterplan for Transport Interconnectivity – Land and air accessibility
  Pre-feasibility studies within AIM-TI - Land and air accessibility:
  Adriatic-Ionian highway
  ADRION Cycle Tour
- GraSP Study - Green and smart ports study
- ADRIONCYCLETOUR - ADRiatic IONian CYCLE route for sustainable TOURismCenter - Collaboration between Pillar 2 (Transport subgroup) & 4

Power networks and market for a green Adriatic-Ionian Region

02

- EUSAIR MPEN - Adriatic-Ionian Region Masterplan of Energy Networks for the Adriatic-Ionian region
  Pre-feasibility studies within EUSAIR MPEN:
  1. Power networks and market for a green Adriatic-Ionian Region
  2. Integrated natural gas corridors and market for a Green Adriatic-Ionian Region
  3. LNG Infrastructure, logistics and direct use of LNG for a marine and road transport
- STETAI - Sustainable Tourism through Environmental Energy Technologies in Buildings of High Architectural Interest - Collaboration between Pillar 2 (Energy subgroup) & 4

Integrated natural gas corridors and market for a green Adriatic-Ionian Region

03

- EUSAIR AP - Action Plan (Road Map) towards an EUSAIR Power Exchange and Natural Gas Trading Hub

Development and operation of logistics for direct LNG use as a clean fuel for the Adriatic-Ionian Region

04

- WAI-TP: WATERBORNE - Adriatic-Ionian Technology Platform - Collaboration between Pillar 1 & 2 (Transport subgroup)

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EUSAIR Flagships 2021 - 2027

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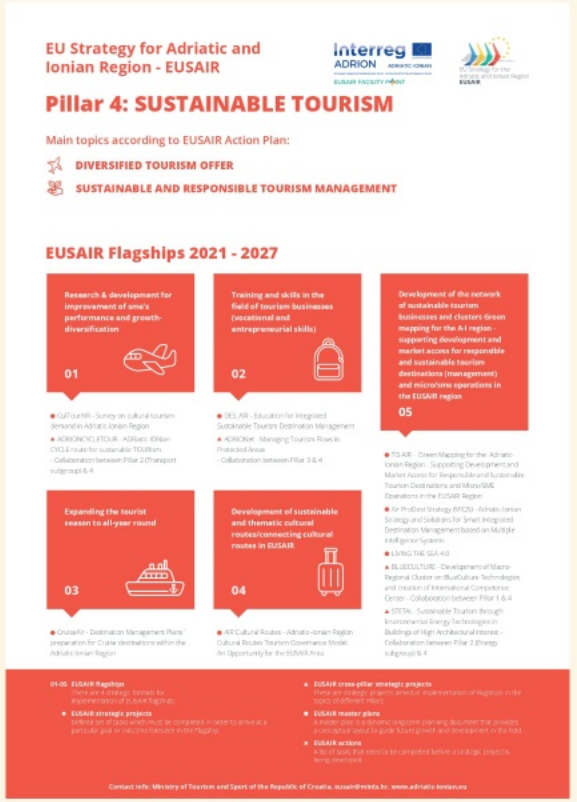

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" Sustainable tourism and 'effective - sustainable - multimodal - transnational' connectivity are two sides of the same coin "

Unlocking Tourism Potential of the Adriatic-Ionian Region through Seamless Transnational Connectivity

EUSAIR Pillar 2 Transport: Connectivity as a Vital Tool for Tourism Development