

Interreg
Mediterranean



EUROPEAN UNION



**SUSTAINABLE
TOURISM**

STATE OF PLAY OF TOURISM IN THE MEDITERRANEAN

A Roadmap for a Greener, Inclusive & Resilient
Tourism in the Mediterranean

SUSTAINABLE TOURISM COMMUNITY - INTERREG MED

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ACRONYMS AND ABBREVIATIONS

CBD: Convention on Biological Diversity

COP: Conference of the Parties

EC: European Commission

EGD: European Green Deal

EM: Emerging Markets

ENI CBC: Cross-Border Cooperation under the European Neighbourhood Instrument

ERDF: European Regional Development Fund

EU: European Union

GDP: Gross Domestic Product

GTPI: Global Tourism Plastic Initiative

ICT: Information and Communications Technology

ICZM: Integrated Coastal Zone Management protocol

ITA: International Tourist Arrivals

MAP: Mediterranean Action Plan

MEA: Multilateral Environmental Agreement

MSSD: Mediterranean Strategy for Sustainable Development (Barcelona Convention)

MSP: Marine Spatial Planning

NbS: Nature-based solutions

NECSTouR: Network of European Regions for a Sustainable and Competitive Tourism

OECD: Organisation for Economic Co-operation and Development

PA: Paris Agreement

SAP BIO: Strategic Action Programme for the Conservation of Biological Diversity in the Mediterranean Region

SCP AP: Regional Action Plan on Sustainable Consumption and Production for the Mediterranean

SD: Strategic Direction

SDGs: Sustainable Development Goals

SMEs: Small and Medium Enterprises

STC: Sustainable Tourism Community - Interreg MED

UfM: Union for the Mediterranean

UN: United Nations

UNDP: United Nations Development Programme

UNEP/MAP: Mediterranean Action Plan of the United Nations Environment Programme

UNEP: United Nations Environment Programme

UNFCCC: UN Framework Convention on Climate Change

UNWTO: United Nations World Tourism Organization

WTTC: World Travel and Tourism Council

EXECUTIVE SUMMARY

The Mediterranean region is an emblematic region for coastal and marine tourism, as one of the most popular destinations in the world, with negative externalities impacting its natural, cultural and social resources. However, the Covid-19 pandemic has severely impacted the sector and has provided the opportunity to think about a different model of tourism in the Mediterranean.

In the framework of the **Interreg MED Sustainable Tourism Community** and in line with its mandate to work on regional tools for sustainable tourism, Plan Bleu committed to producing a report on the State of play of Tourism in the Mediterranean to inspire the Contracting Parties to the Barcelona Convention and to foster the transition towards sustainable development in the Mediterranean Region supporting the implementation of the Mediterranean Strategy for Sustainable Development and the Integrated Coastal Zone Management in the Region by encouraging sustainable development in marine and coastal areas.

The aim of this report is to assess the **state of play** of coastal tourism, including ecotourism, in the Mediterranean in a post-COVID-19 era. It offers a **shared vision** and a **collective roadmap** to support policy and decision-makers, tourism stakeholders and local communities to develop smarter, greener and more inclusive tourism after the global health crisis. It integrates new **policy initiatives** and trends in the Mediterranean, paying special attention to today's challenges and showcasing innovative sustainable tourism practices.

Multiple crises

The triple crises of **climate change, biodiversity loss** and **environmental pollution**, as well as external disruptions such as the **COVID-19 pandemic** and growing **geopolitical conflicts** are increasing threats for the tourism industry globally, and particularly in the Mediterranean, a unique biodiversity hotspot and a major tourism player. At the same time, tourism is a major source of carbon emissions, land artificialisation and marine litter that are driving the environmental and climate crisis. However, there is **scarce and fragmented knowledge** on the current state and path of the sector in the region since the pandemic. This report therefore aims to help characterise Mediterranean coastal tourism in a multiple crisis context.

Impact of the pandemic

Socio-economic analysis shows that Mediterranean countries have suffered the harshest impacts of COVID-19 based on decreases in Gross Domestic Product and increased unemployment rates. The study shows that **International Tourist Arrivals** (ITAs) decreased exponentially from 400 million inbound arrivals in 2019 to over 88 million ITAs in 2020. Lastly, some post-pandemic tourism trends point towards increased **digitalization** and **globalisation** of tourism demand and supply. Other preliminary projections include greater willingness to pay more for **safer vacations**, the combination of work and vacations, stronger focus on **nearby markets, longer stays** at few destinations, the re-emergence of long-distance **train travel** and preferences for **outdoor spaces and activities**.

Governance and institutional framework

From a **governance** standpoint, the document compiles relevant **institutional and policy frameworks** such as the **Paris Agreement** and the **Glasgow Declaration**, as well as **the Convention on Biological Diversity** and the Aichi Targets. It also builds on **European Union** (EU) initiatives like the **Transition Pathway for Tourism**, and the **Blue Economy Strategy**.

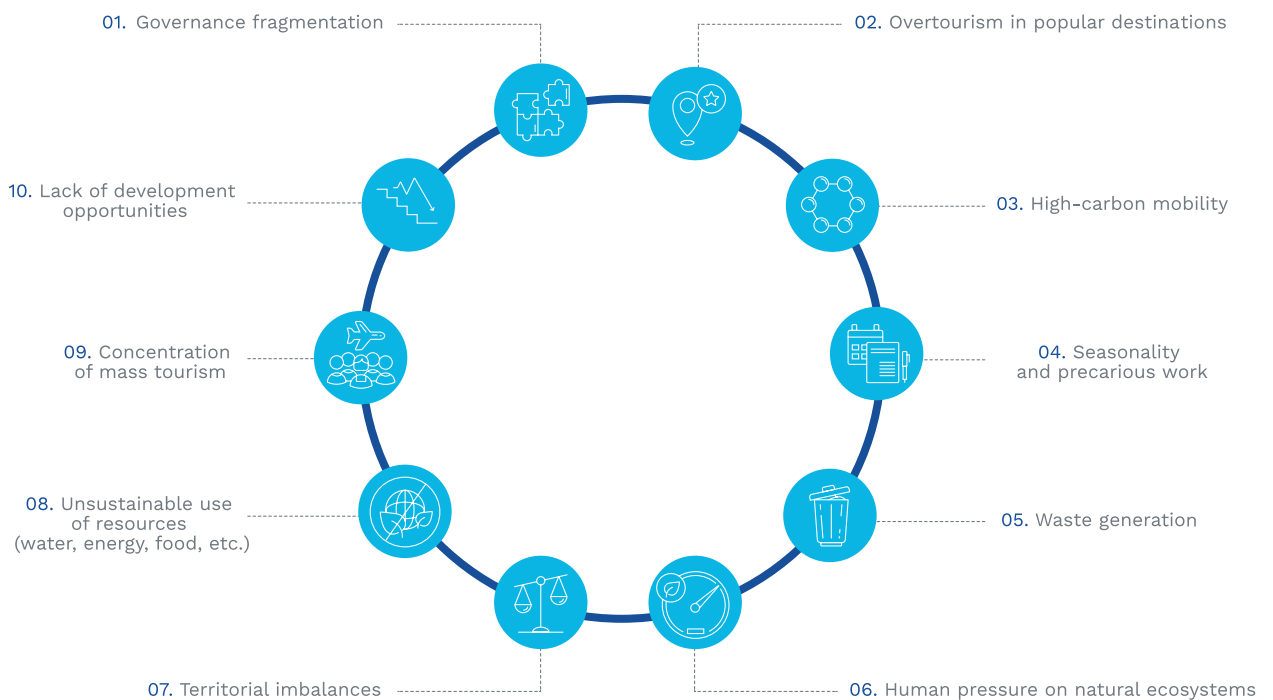
Finally, the report identifies key regional multilateral initiatives like the **Barcelona Convention**, the “Post-2020 Strategic Action Programme for the Conservation of Biodiversity and Sustainable Management of Natural Resources in the Mediterranean Region» (**Post-2020 SAP BIO**), the **Union for the Mediterranean**’s initiatives on Blue Economy as well as the EU funded **Interreg MED** and **ENI CBC Med** projects on sustainable tourism.

Environmental challenges

From an environmental standpoint, the report looks closely at tourism’s capacity to face climate change mitigation and adaptation requirements. It also assesses the difficulties involved in preserving and regenerating biodiversity while continuing with tourism activities. In addition, it emphasises the challenges of applying the circular economy principles to the tourism sector, and keeping up with innovation and digitalisation demands. Finally, the document provides critical lessons learned from the COVID-19 pandemic.

Critical issues

The report highlights the necessity and urgency to address the following problems:



Vision and opportunities

When it comes to offering a new vision for sustainable tourism in the Mediterranean, this report proposes three main focuses:

01. Institutional synergies,
02. Just and inclusive transition and
03. Alternative tourism models.

The new shared vision for sustainable tourism in the Mediterranean opts for long-term, sustained benefits that integrate the climate emergency. Holistic measures and innovative strategies for a fair transition from mass tourism to sustainable tourism in the Mediterranean are therefore needed.

Roadmap towards sustainable Mediterranean tourism

The overarching objectives for sustainable coastal tourism in the Mediterranean identified before the pandemic¹ remain relevant:

01. Environmental integrity,
02. Social equity,
03. Economic prosperity,
04. Cultural heritage and
05. Shared governance.

As they have not been achieved yet, they are still keystones for achieving sustainable tourism in the Mediterranean.

The Strategic Directions (SD) to work towards Sustainable Mediterranean Tourism concern:

01. Strategic Planning,
02. Adaptive Management,
03. Resilient Infrastructure and Connectivity,
04. Inclusive and Multi-level Governance,
05. Communication and Visitor Empowerment and
06. Vulnerable Communities Support.

This report aims to establish the current scenario to help regional, national and local policymakers and stakeholders work towards real sustainable tourism following a shared vision²:

“Promote sustainable Mediterranean tourism in which visitors and hosts enjoy balanced, respectful and fruitful relationships and value the unique Mediterranean environmental, human and cultural heritage, while ensuring inclusive socio-economic development, taking into account the carrying capacity of healthy natural ecosystems, and developing complementarity between various economic activities at the tourist destination level.”

¹ Fosse and Le Tellier (Plan Bleu, 2017)

² <https://planbleu.org/en/publications/sustainable-tourism-in-the-mediterranean-state-of-play-and-strategic-directions/>



1

INTRODUCTION

This chapter explains the logic behind this document by presenting the purpose of the report. It goes on by introducing the background of the study and the context. In addition, it includes the key highlights of the tourism sector in the Mediterranean. Finally, it shows the report outline and methods.

1.1 | Purpose

The purpose of this report is to assess the **state of coastal tourism, including ecotourism, in the Mediterranean** region in a post-COVID-19 era, by building on the previous study *Sustainable Tourism in the Mediterranean: State of Play and Strategic Directions* (Fosse and Le Tellier, 2017). The report's objective is to **support decision-makers and local communities to build smarter, greener and safer tourism** after the global health crisis by considering new policy initiatives and trends in the Mediterranean region; paying special attention to today's challenges (i.e., climate crisis, biodiversity loss and COVID-19 pandemic); and showcasing sustainable tourism best practices in the Mediterranean to replicate and scale up potential solutions. The post-Covid-19 era brings an opportunity for tourism to rebuild its foundations and pave the way towards a more sustainable sector in the Mediterranean region. This report is therefore meant to serve as a basis for a potential **Mediterranean Strategy for Sustainable Tourism (MSST)** in the near future.

The Sustainable Tourism Community Interreg MED horizontal project (2019–2022), a new phase of the Blue-TourMed project (2016–2019), now relies on 30 thematic projects involving more than 200 organisations (mainly public authorities, universities, NGOs and international organisations) active in 13 European countries to promote sustainable tourism by capitalising on tools and good practices developed by its projects and mainstreaming the results into European, national, regional and local policies, while focusing on how they can contribute to green and digital post-Covid tourism recovery. The results and lessons learned from Community projects are a unique knowledge asset that can help the transition to innovative tourism policies and practices based on sustainability principles.

1.2 | Policy background

This document takes into account main regional **policy frameworks** such as the **2030 Agenda for Sustainable Development** and related Sustainable Development Goals (SDGs), the **Mediterranean Strategy for Sustainable Development** (MSSD) 2016–2025 from the **Barcelona Convention** (BC), the Post-2020 Strategic Action Programme for the Conservation of Biodiversity and Sustainable Management of Natural Resources in the Mediterranean Region» (**Post-2020 SAP BIO**) as well as the **Regional Action Plan on Sustainable Consumption and Production for the Mediterranean** (SCP AP) along with other recent initiatives to improve the sustainability and circularity of the sector. The scope of this study covers the 21 riparian countries that are Contracting Parties of the **Barcelona Convention**³, plus the State of Palestine.

1.3 | Environmental context

Marine and coastal ecosystem changes around the globe are inescapable. However, some regions like the Mediterranean are shifting more rapidly than others. The **triple crisis of climate change, biodiversity loss and environmental pollution** are especially impacting the mid-latitude region, where experts highlight that **temperatures are rising 20% faster than the global average**, and **sea level rise is expected to exceed one metre** by 2100 (MedECC, 2020). Mediterranean coasts will be more impacted by climate change effects than other areas, even more than what has been anticipated, with intensifying extreme events such as heat waves, floods, droughts and water scarcity (MedECC 2020, IPPC 2022), impacting coastal tourism which is the backbone of Mediterranean economies. Furthermore, Mediterranean natural resources are reaching critical tipping points as a result of overexploitation, rapid economic growth, and linear growth-based tourism model. A common vision to address the root causes of major externalities of the sector such as water, waste and energy management as well as plastic pollution need to be addressed to foster the circularity of the sector

³ Albania, Algeria, Bosnia and Herzegovina, Croatia, Cyprus, Egypt, France, Greece, Israel, Italy, Lebanon, Libya, Malta, Monaco, Montenegro, Morocco, Slovenia, Spain, Syrian Arab Republic, Tunisia and Türkiye.

to face challenges such as the pollution of the Mediterranean sea by an estimated **730 tonnes of plastic** waste every day (IUCN, 2021a; UNEP/MAP, 2022).

In view of the critical situation of multiple crises, the United Nations Environment Programme Mediterranean Action Plan (UNEP/MAP) expresses that “*the Mediterranean region is not on track to achieve and fully implement the Sustainable Development Goals of Agenda 2030*” and brings to light the importance of transitioning to a sustainable blue economy –both in the northern and southern Mediterranean countries– for the sake of a healthy marine environment and future generations (Cappelletto et al., 2021, p.1).

1.4 | Tourism and the blue economy

The **blue economy** entails economic activities that create sustainable wealth from the ocean and coasts, and encompasses three related but different meanings: i) the need to address the environmental and ecological sustainability of the ocean, ii) the overall contribution of the ocean to economies, and iii) the ocean economy as a growth opportunity for developed and developing nations (MICBE, 2022). Moreover, the UfM Ministerial Declaration on Blue Economy of 2015 refers to **blue economy** as “the set of human activities depending on the sea and/or underpinned by land-sea interactions in the context of sustainable development, and notably including industrial and service sectors such as aquaculture, fisheries, blue biotechnologies, coastal and maritime tourism, shipping, ship-building/repair, ports, ocean energy and marine renewable energy, including offshore wind, which are among the main traditional and emerging economic maritime sectors in the Mediterranean Sea basin.”

The ‘**blue economy**’ is therefore a broader term, which raises questions such as “*which ocean-based industries, sectors and projects can be ‘Blue’ in the sense of producing socioeconomic benefits from sustainable exploitation or use of the marine ecosystems?*” as claimed by Lloret et al. (2022, p.2) who, like others (Bennet et al., 2021; Farmery et al., 2021; Schutter et al., 2021) contribute to the debate of justice frameworks of the blue economy concept. Yet, the blue economy is an increasingly influential concept in the ocean-based sustainable development narrative, and the **coastal tourism sector** is included in it (EC, 2021; Voyer and van Leeuwen, 2019). The latest UfM Ministerial Declaration on Sustainable Blue Economy⁴ already highlighted that preserved marine and coastal ecosystems as well as marine cultural heritage contribute to the attractiveness of coastal areas. At the same time, Ministers recognised that relevant policies, including research and innovation, must acknowledge the impacts of tourism activities on coastal areas, and the vulnerability and complexity of the coastal and maritime ecosystems.

1.5 | Tourism in the Mediterranean

1.5.1 | World tourism leader

The Mediterranean is a coastal region with ideal conditions for living and travelling (mild climate, culture, landscapes, gastronomy and security). Consequently, there are numerous tourism activities associated with the sea, well-being, culture, sports, nature and business. In fact, the **Mediterranean attracts about one third of world tourism** and was the main tourist destination on the planet with more than 400 million International Tourist Arrivals in 2019. The four most important sectors of the tourist market in Mediterranean countries are **cruiises, nautical activities, sun and beach holidays** and **cultural getaways** (UNEP/MAP & Plan Bleu, 2020; UNWTO, 2019c; IEMed, 2003). **Coastal tourism** is thus the backbone of Mediterranean economies and development strategies, as it triggers sectoral synergies (e.g. between the transportation, accommodation, food and beverage, and entertainment sectors) (Europarc, 2019).

⁴ <https://ufmsecretariat.org/wp-content/uploads/2021/02/Declaration-UfM-Blue-Economy-EN-1.pdf>

1.5.2 | Major cruise destination

The Mediterranean is also the most popular **cruise destination** for European travellers and the second market globally for the industry, hosting 10% of the world's cruises, with an economic impact of €57.3 billion and 8 million passengers, the cruise sector plays an important role in the economies of Mediterranean countries (Plan Bleu, 2022). The Mediterranean Sea is also a well-known destination for **recreational boating** (González, 2020). It also hosts a vast number of large yachts, which is expected to increase (WestMED, 2022). Consequently, there are significant challenges to be faced if both the cruise and boating industries aim to achieve sustainability while keeping the Mediterranean Sea healthy (Plan Bleu, 2022).

1.5.3 | Eco-tourism market

Nature-based tourism, or eco-tourism, is a growing market located in or near Protected Areas (PAs). According to UNWTO's definition⁵, ecotourism refers to forms of tourism such as nature-based forms of tourism in which the main motivation of the tourists is the observation and appreciation of nature as well as the traditional cultures prevailing in natural areas. It also contributes to minimising negative impacts on the natural and socio-cultural environment and supporting the preservation of natural areas which are used for ecotourism. It involves travelling to preserved destinations where the fauna, flora, and cultural heritage are the centre of attractions. Globally the **ecotourism market** was valued at \$181 billion in 2019, and is expected to reach \$333.8 billion by 2027, registering a CAGR of 14.3% from 2021 to 2027⁶.

The Mediterranean Sea, covered by 8.33% of **Marine Protected Areas** (MPAs)⁷, is a hotspot for Nature-based tourism. According to a recent European survey, 43% of the tourists' searches are for '*natural environment in the destination*'⁸. Recent regional initiatives, such as the **Mediterranean Eco-tourism Network** (MEET)⁹ and the DESTIMED PLUS project actively promotes high-quality ecotourism experiences that benefit conservation and local communities.

1.5.4 | Need for cooperation towards healthy ecosystems

Coastal and maritime activities call for **multi-level cooperation** to capture economic, social and environmental benefits, which in turn require **functional ecosystems** (UNEP/MAP & Plan Bleu, 2020). Nonetheless, as happens in almost all industries, improper management of tourism puts this ecosystemic functionality at risk. This is further exacerbated by problems resulting from coastal management, which includes **plastic waste** generation, **biodiversity loss** (because of coastal urbanisation and coastal erosion) and **greenhouse gas emissions** (especially due to air travel) (UNEP/MAP, 2022; IM, 2022a; UNWTO, 2019a).

1.5.5 | Post-pandemic situation

Tourism in the Mediterranean accounted for **11.3% of Gross Domestic Product (GDP)** and represented over 70% in terms of Production Value and Gross Value Added before the COVID-19 pandemic (UNEP/MAP, 2017). After the global health crisis, these economic indicators have decreased, along with the rate of development of Mediterranean communities (WTTC, 2022). However, the current situation of the state of coastal tourism in the Mediterranean is still poorly documented (UfM, 2022; Ruggieri & Calò, 2022; Fosse, Kosmas & González, 2021).

5 <https://www.unwto.org/sustainable-development/ecotourism-and-protected-areas>

6 <https://www.alliedmarketresearch.com/eco-tourism-market-A06364>

7 <https://medpan.org/marine-protected-areas/mediterranean-mpas/>

8 *Attitudes of Europeans towards tourism (2021). Eurobarometer 499.* <https://europa.eu/eurobarometer/surveys/detail/2283>

9 www.meetnetwork.org

For this reason, this exploratory report contributes to filling in these knowledge gaps, by studying the current state of the tourism industry in the Mediterranean region, and by illustrating how the promotion of **digital and green tourism systems** is fundamental for the sustainable tourism transition (OECD, 2020a).

1.6 | Report outline and methods

This report is a deliverable of the Interreg MED **Sustainable Tourism Community (STC)**¹⁰, and its structure consists of chapters on the State of Mediterranean tourism; institutional frameworks and initiatives; environmental, social and economic challenges. They are based not only on **academic and grey literature**, but also the results obtained in an online **qualitative survey** (see Annex II).

The **survey**, answered by Mediterranean Tourism Stakeholders (such as intergovernmental organisations, non-governmental organisations, local and regional governments, national governments and tourism agencies, industries), helped to:

01. identify important issues and challenges faced by Mediterranean tourism;
02. assess sustainable coastal tourism opportunities and obstacles;
03. identify new trends, initiatives and case studies.

In addition, the report includes chapters on a vision for sustainable tourism in the Mediterranean, and objectives, strategic directions and actions. The report also contains trends and lessons identified previously, bridging the gaps between the challenges detected and the shared vision. Most importantly, it is a preliminary guide to support decision-makers and communities to develop smarter, greener and safer tourism activities.

Annex I provides inspiration about available solutions by presenting a range of concrete case studies on sustainable tourism in the Mediterranean from the Interreg Med programme, Sustainable Tourism Community, and from the ENI CBC MED programme that answer the challenges identified in the Mediterranean region.

¹⁰ <https://sustainable-tourism.interreg-med.eu/>



2

STATE OF TOURISM IN THE MEDITERRANEAN

Mediterranean tourism is one of the highest income generating industries of the region. However, as stressed by the Organisation for Economic Co-operation and Development (OECD, 2020a), the global COVID-19 pandemic has triggered an unprecedented crisis in the tourism sector. This chapter sheds light on key socio-economic data, changes in international tourist arrivals (ITAs), market situation, and trends.

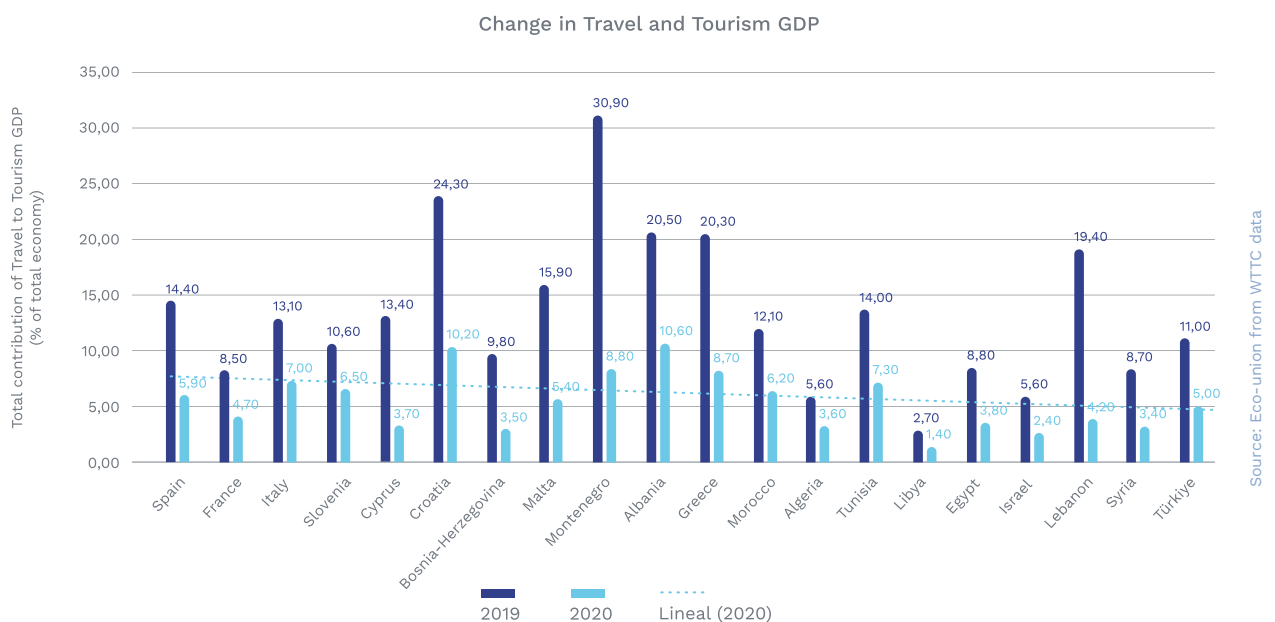
2.1 | Key socio-economic data

In the Mediterranean Basin, tourism is vital for many countries. Considering exclusively **coastal area economies**, tourism accounts for over **70% of Production Value and Gross Value Added** (UNEP/MAP, 2017, n.p). Expectedly, after the tourism boom, there was an increase in employment in the sector which shaped the socio-economic development of the region, in particular in the northern territories of Spain, France, Italy, Monaco and Malta. In other words, since the mid-90's, the tourism industry has helped generate steady growth in Euro-Mediterranean employment, except during the 2008-2014 economic crisis.

After that, in 2015, **employment generated by tourism reached 11.5%** in the Mediterranean economies at large (Fosse et al., 2021). At the European level, in 2018, **2.3 million businesses** employed 12.3 million individuals in tourism-related sectors, such as distributive trades and services (Eurostat, 2019). Pre-pandemic studies highlighted that tourism was expected to increase even more, reaching **12.5% of the region's GDP by 2026**, and accounting for 2.8 million jobs by 2027 (Petrick et al., 2017). Although the perpetuation of tourism in present times is not jeopardised, experts emphasise the 'when' and 'how' to bounce forward from the still unresolved COVID-19 crisis and Russia's ongoing invasion of Ukraine (WTTC, 2021b; EC, 2022d).

2.2 | Impacts of the pandemic

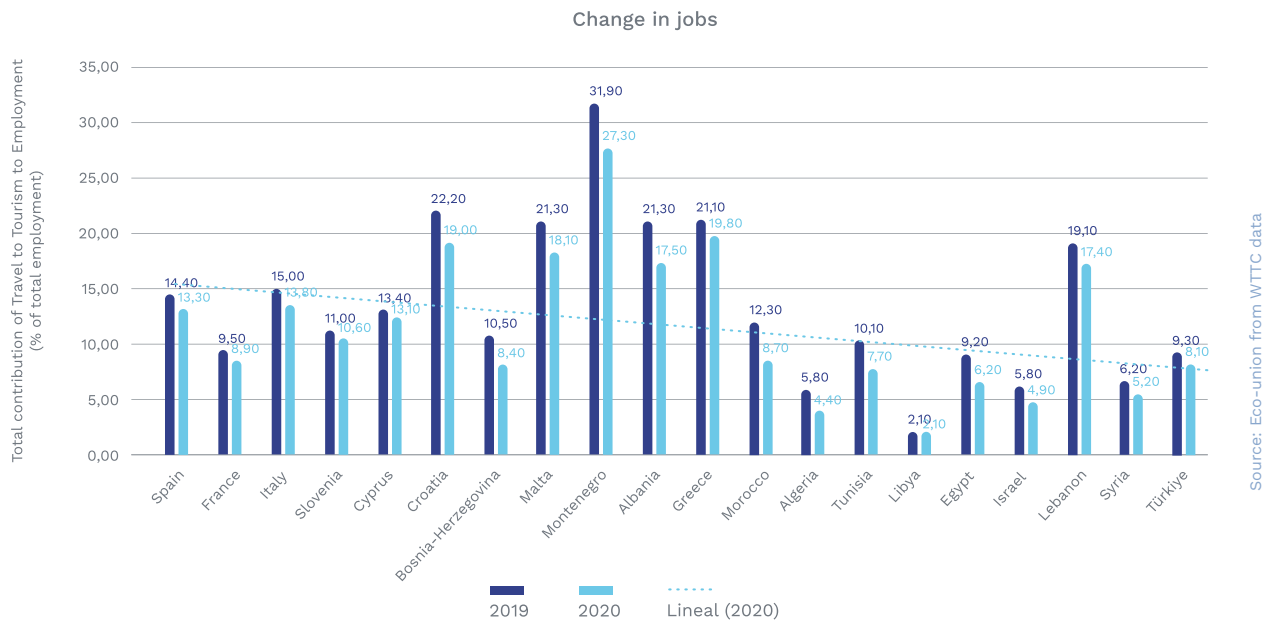
The COVID-19 crisis put "between 100 and 120 million direct tourism jobs at risk all over the world, many of them in Small and Medium-sized Enterprises" (UNWTO, 2021, n.p). In relative terms of Gross Value Added generated, the northern Mediterranean countries have been the worst affected by COVID-19: "Cyprus (-77 %), Greece (-71 %), Spain (-68 %), Malta (-62 %) and Croatia (-62 %)" (EC, 2022d, p.107). Based on data from **Global Economic Impact Reports** (WTTC, 2021a), Graph 1 and Graph 2¹¹ below, show Mediterranean (Med) trends for the nation's GDPs and employment rates in the tourism sector before and after pandemic times, namely in 2019 and 2020.



Graph 1. Travel and tourism contribution to GDP in Mediterranean countries before and during the pandemic (WTTC, 2021a)

¹¹ Graph 1 and 2 do not include data from Monaco as they were not available in the WTTC database (2021a).

As seen in Graph 1, the three **northern Med countries** that suffered the harshest impacts of COVID-19 in their economies, based on their changes in GDP, were **Montenegro, Croatia** and **Greece**. Montenegro experienced a 22.1% decrease in its GDP, Croatia 14.1%, and Greece 11.6% from 2019 to 2020. While the **southern and eastern Med** economies affected the most were **Lebanon, Tunisia and Türkiye**. Their respective changes in terms of GDP were 15.2%, 6.7% and 6%. Note that the green dotted line shows the linear decrease of GDP in the Mediterranean from tourism.



Graph 2. Mediterranean economies impacted by COVID in terms of employment (WTTC, 2021a)

Meanwhile Graph 2 indicates that the top three **northern Med countries** that suffered the most severe impacts of COVID-19 in their total employment rates were **Montenegro, Albania and Croatia**. Montenegro's employment rate decreased by 4.6%, Albania 3.8% and Croatia 3.2%. For the **southern Med region**, Morocco, Egypt and Lebanon were the most impacted, which suffered 3.6%, 3% and 1.7% decreases respectively. Also, note that the green dotted line represents the linear decrease in employment in tourism-related industries.

All in all, the **impact of COVID-19** on the northern Med is higher than in the southern Med in terms of GDP and employment. This difference could be attributed to the uneven historical evolution of the industry throughout the Mediterranean. As already mentioned, the boom of the sector first began in the Euro-Mediterranean region, therefore resulting in deeper and broader installation of tourism enterprises in the area. However, it is clear that the social and economic impacts of the pandemic on the tourism sector have significantly disrupted both sides of the Mediterranean at different rates in the recovery due to the rollout of vaccines and reopening rules.

2.3 | International Tourism trends

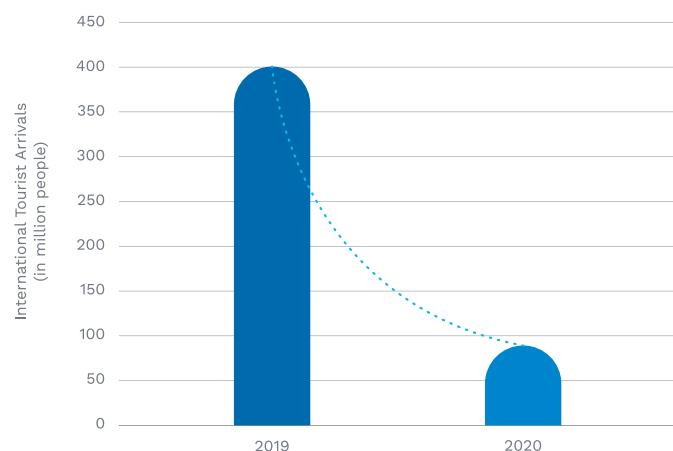
The Mediterranean is the world's leading tourism destination (UNEP/MAP, 2017, n.p). As illustrated in Graph 3, there has been a steady increase in **International Tourist Arrivals** (ITAs) in the Mediterranean since the mid 90s. Northern countries in the West (especially Spain, France and Italy) have the most ITAs, followed by the north-eastern countries: Slovenia, Croatia, Bosnia-Herzegovina, Montenegro, Albania and Greece.

Since the mid-00s the south-eastern countries - Egypt, Israel, Lebanon, Syria, Türkiye and Cyprus – have started hosting more ITAs than during the previous decade. Likewise, the south-western nations of Morocco, Algeria, Tunisia, Libya have also increased their ITAs. However, the regional distribution of tourism flows is significantly unbalanced. The north-western Mediterranean region concentrates 64% of ITAs, while the south-eastern Mediterranean region only represents 17%.



Graph 3. Change in Mediterranean ITAs (UNWTO, 2021 & WB, 2022)

2020 was the worst year on record for global tourism due to global lockdowns related to the pandemic. ITAs dropped 74%, which is 70% more than during the 2009 global economic crises (UNWTO, 2021). Europe recorded a “70% decrease in arrivals [...] the largest drop in absolute terms, with over 500 million fewer international tourists in 2020” (UNWTO, 2021). Mediterranean tourism has been severely impacted by the **travel restrictions** as well. Air, maritime, road and train travel reduced their activities drastically for almost a year from the second half of March 2020 (OECD, 2021b). COVID-19’s impact on ITAs in the Mediterranean led to a major decrease from 400 million inbound arrivals in 2019 to 88 million ITAs in 2020 (Statista, 2022¹²). As indicated in Graph 4, with the green dotted line, there was an exponential decrease in ITAs across the Mediterranean. In particular, 312 million less international tourists travelled to the region, which is a 78% drop from 2019 levels.



Graph 4. Mediterranean impact of COVID-19 in terms of ITAs (WTTC, 2021a & Statista, 2022)

¹² The public database, Statista, points out that Europe recorded around 88 million arrivals in 2020. As this report has not found specific data from the Mediterranean Basin exclusively, and given the fact that Europe’s top tourist destinations are in the Mediterranean area (UNEP/MAP, 2017) - which is also the most significant shore in terms of touristic development as illustrated in Graph 3 - Graph 4 does not show an exact change in Mediterranean ITAs, but rather a European approximation. However, it is believed to be fairly accurate as the WTO estimated over 500 million fewer international tourists in 2020 in Europe. Since it is a larger region in area than the Mediterranean, it is reasonable that this report indicates over 312 million less ITAs in 2020 in the Mediterranean.

However, since 2021, the overall recovery of the industry is certain (WTTC, 2021b). In fact, in 2023, international passenger numbers are expected to exceed pre-pandemic levels (MO, 2021). **Mediterranean forecasts** (pre-pandemic) expect **500 million ITAs in 2030**, meaning potentially 250 million ITAs in coastal areas, in addition to domestic tourists (Petrick et al., 2017). However, there is debate on which modes of transport will and should be demanded the most in order to comply with climate agendas, as tourism's contribution to climate change is closely linked to air travel (UNWTO, 2019a).

2.4 | Market situation

As detailed above, the coastal tourism markets in the Mediterranean are an important source of economic growth and employment. This explains why efforts to offer quality services are made to attract a larger volume of tourists.

2.4.1 | Competitiveness

The relative proximity of Mediterranean countries to each other results in **competitiveness**¹³ within the region. Accordingly, a tourist destination is competitive if it generates economic, social and environmental benefits for the residents of the destination (Marti & Puertas, 2017). The Mediterranean coastal region offers a variety of tourist destinations, each with their own specific characteristics. This has an impact on **tourism flows** from one country to another. Moreover, **insecurity and conflicts** in countries such as Libya and the Middle East can also have the effect of diverting tourists to neighbouring countries that are more stable (MTF, 2022).

To estimate the competitiveness of countries, the **Travel and Tourism Competitiveness** (TTC) index measures the enabling environment, infrastructure, natural and cultural resources and travel and tourism policy, as key traits of destinations (Marti & Puertas, 2017). Based on that TTC index, **Spain, France and Italy** are ranked first, second and eighth respectively. These three countries host around 70% of the overall industry in the Mediterranean (WEF, 2022). On the other hand, **Algeria, Lebanon and Tunisia** are the Mediterranean countries which hold the lowest positions on the 2019 TTC ranking, as they are ranked 116th, 106th and 85th respectively, which is well below average. This shows that these destinations are not sufficiently exploiting their tourism capacity (Marti & Puertas, 2017).

Lastly, some **other traits** which affect tourism products and influence their competitiveness include:

“Affinity for travel and tourism, cultural measures, prioritisation of travel and tourism, Information and Communications Technology (ICT) infrastructure, health and hygiene, air transport infrastructure, ground transport infrastructure, environmental sustainability, safety and security, tourism infrastructure, policy rules and regulations, natural resources and price competitiveness in the travel and tourism industry”.

Du Plessis, Saayman & Van der Merwe, 2017, p.3

Disturbance in a distant destination can create a sharp decline of arrivals in other destinations, even those that are stable and safe (Fosse and Le Tellier, 2017).

¹³ Destination competitiveness can be defined as “a destination’s ability to increase tourism expenditure, and to increasingly attract visitors, providing them with satisfying, memorable experiences, and to do so in a profitable way, while enhancing the well-being of destination residents and preserving the natural capital of the destination for future generations” (Ritchie & Crouch, 2003, p.2).

2.4.2 | Traditional and emerging markets

Traditional Mediterranean tourism markets are mainly European (EC, 2022a). In fact, tourists from outside the European Union (EU) only account for 13% of nights spent (TC, 2020). As their rankings have not fluctuated significantly over the last decades, they are called traditional markets. However, the Mediterranean countries that traditionally receive fewer tourists, such as **Türkiye** and **Egypt**, have experienced the highest ITA growth since 2016, following the Arab Spring and the episode of insecurity suffered by **Türkiye** in 2015-2016. The Turkish market grew by 12,8% while the Egyptian market expanded by 17.8% in 2019 (TC, 2020). Therefore, they are now referred to as **Emerging Markets** (EMs) or emerging tourist destinations. According to the World Travel and Tourism Council, international tourism forecasts expect growth in these markets, together with Tunisia and Morocco. They are regarded as ‘big’ rivals to traditional markets.

Other EMs outside of the Mediterranean region have also impacted market trends. This is the case of emerging economies like **China, Russia, Brazil and India**, which will gradually expand their market share until 2030 (EC, 2022a). Their economies are currently leading the growing demand for international tourism. In 2016, China achieved the highest international tourism expenditure in the world. This trend of growing demand for international tourism results from specialisation processes, complementary offers and physical capital investments to achieve economies of scale. However, Europe has the highest share of international travelers and the Mediterranean region still has the highest number of ITAs.

2.4.3 | Post-pandemic patterns

Countries with coastal areas registered more significant drops in turnover than landlocked countries, as evidenced by air transport turnover and number of nights spent (EC, 2022d). However, the tourism market situation has shifted broadly on a global scale. After the pandemic, **nature-seeking tourism and ecotourism** have increased their stake in the market. For example, in the Mediterranean, the **Natural Parks** of Spain became important frequently visited areas during the 2020-2021 period of COVID-19, with significantly more visitors than pre-pandemic times (González et al., 2022).

Building **responsible tourism**, fostering a culture of conservation, developing an environmental focus, and adopting new strategies of development in tourism destinations are now emerging trends as well (Casals, Boy & Colón, 2021; UNWTO, 2019b). Studies show that new types of tourists are those who value the sustainable aspects of destinations, accommodation, facilities and transport. A survey undertaken revealed that more than 90% of travelers opted for a ‘green’ environmentally conscious hotel if the price and amenities offered were comparable to those in a non-sustainable, non-green hotel (Casals, Boy & Colón, 2021).

2.5 | Tourism and Climate change

The Mediterranean region is warming 20% faster than the global average. (MedECC, 2020) The increase in severe climate events (wildfires, heat waves, droughts and flooding) due to climate change are also likely to influence the choice of destinations and time to travel for visitors (Tol, 2012). The region is home to over 510 million people and the effects of climate change will put additional pressure on already strained ecosystems and vulnerable economies and societies¹⁴. The literature that discusses the link between **climate change and tourism demand** in the Mediterranean has highlighted that by mid century or earlier, climate change will push Mediterranean **temperatures above the threshold for human comfort**, but increase shoulder season demand, resulting in the region becoming “too hot” during the summer peak tourism season while extending the autumn and spring season (Rutty, 2010). Tourism will likely be affected by climate change through

14 <https://www.unep.org/unepmap/resources/factsheets/climate-change>

reduced thermal comfort, degradation of natural resources and ecosystems, including freshwater availability, and coastal erosion due to sea level rise and urban development (MedECC, 2020).

Coastal destinations are particularly vulnerable to the impacts of climate change and need to prepare comprehensive strategies related to climate mitigation and adaptation that involve all tourism stakeholders and the entire value chain, based on quantitative and qualitative policies, actions and indicators (Eco-union, 2019). The most worrying impact of climate change on tourism in the southern Mediterranean in the medium (2030) and long-term (2050) will happen in the eastern (Egypt, Israel, Jordan, Lebanon and Palestine) and western (Algeria, Morocco and Tunisia) countries (UfM, 2018). Furthermore, water temperature is expected to rise by 1.8°C to 3.5°C by 2100 with hotspots in Spain and in the Eastern Mediterranean and impacts on ecosystems such as mass mortality of sensitive species, proliferation of invasive alien species, and algal blooms that could also impact the tourism choices in the future. Climate change is already causing an increase in the frequency and intensity of marine heatwaves and mass mortality events. During the 2015–2019 period, the Mediterranean Sea experienced exceptional thermal conditions resulting in the onset of five consecutive years of widespread mass mortality events across the basin (Garrabou et al. 2022). 2022 is another exceptional year, with the magnitude of mass mortality events to be estimated due to large-scale marine heatwaves that have occurred in the Mediterranean¹⁵.

It is crucial also to consider that most impacts of climate change are exacerbated by other environmental issues such as changing land use, increasing urbanisation and tourism (MedECC, 2020), among others, and the sector needs to act accordingly. Initiatives such as the Glasgow Declaration¹⁶, launched during the UNFCCC COP 26, should pave the way to accelerate climate action in tourism and to secure strong commitments to support the global goals to cut emissions in half over the next decade and reach Net Zero emissions as soon as possible before 2050.

The net economic effect on tourism will depend on the country and the season (MedECC, 2020) and the measurement, reporting and disclosure of greenhouse gas emissions are becoming mainstream through initiatives from both public and private sectors. An increasing number of tourism companies are engaging in environmental and carbon reporting¹⁷ and providing evidence of sustainable practices is beneficial considering that a large proportion of travelers are aware of climate change and the impacts of travel (UNWTO, 2021).

At a national level, initiatives such as the Greenhouse gas inventory of the tourism sector in France¹⁸, if replicated at national level by other Mediterranean countries, could play a relevant role in influencing the ecological transition by assessing the origin of these emissions to prioritise efforts.

Recommendations¹⁹ on managing tourism carrying capacity and climate change resilience are already available and need to be considered to minimise climate change impacts in the tourism sector. One example is to increase demand outside the peak season and spatial redistribution of demand (by pricing differentiation, diversified attraction promoting tourism products based on seasonal characteristics during the year and market diversification). This could lead to the geographical distribution of visitors as a strategy against potential overtourism that not only reduces the congestive pressure in the urban area, but also creates a wider spread of socio-economic benefits, employment, and investment in the region.

2.6 | Post-pandemic trends

Trends in coastal tourism over the last two decades revolve around the globalisation of the demand and supply of tourism products (EC, 2022d; AB, 2013). Since the 2008 crisis, global tourism has grown dramatically

¹⁵ <https://t-mednet.org/t-resources/2022-marine-heatwaves>

¹⁶ <https://www.unwto.org/the-glasgow-declaration-on-climate-action-in-tourism>

¹⁷ https://alter-eco.interreg-med.eu/fileadmin/user_upload/Sites/Sustainable_Tourism/Projects/ALTER_ECO/Documents/Alter_Eco_Plus_General_Recommendations.pdf

¹⁸ <https://librairie.ademe.fr/changement-climatique-et-energie/4782-greenhouse-gas-inventory-of-the-tourism-sector-in-france.html>

¹⁹ https://alter-eco.interreg-med.eu/fileadmin/user_upload/Sites/Sustainable_Tourism/Projects/ALTER_ECO/Documents/Alter_Eco_Plus_General_Recommendations.pdf

in the Mediterranean (Graph 3). The way out of the crisis was due to international financialisation of housing and hotel assets, which in parallel with the disruption of the platform economy and the rise of low-cost air travel, have contributed to intense overtourism concentrated in popular destinations (ADB, 2020).

Moreover, the COVID-19 pandemic may have prompted new tourism patterns, i.e. now tourists are willing to pay more for safer vacations (in terms of health and safety) than before the pandemic (see Couto et al., 2020). Despite the uncertainties caused by the health and security crises (COVID-19 and the ongoing Russian invasion of Ukraine), and resource and economic instabilities (fewer raw materials, high energy and fuel prices and looming inflation), it is projected that coastal tourism will continue to expand, both in terms of nights spent in coastal regions and number of tourists compared to pre-pandemic levels (WTTC, 2021b; EC, 2022d).

- i. The European Commission highlights that this increase “will have implications on onshore spatial planning mainly through the construction of new infrastructure and port facilities. While it is not likely that new marinas will be developed, as the marina density is already high (approx. 1 marina per 14 km of coastline), it is expected that hotels or other tourist accommodation will be developed along the coastline” (EC, 2022d).

Lastly, as reflected by the responses to the online survey (Annex II), post-pandemic trends show a **reorientation towards nearby** markets or neighboring regions as well as growing development of green tourism, low-carbon travel and tourism deseasonalisation. The survey also highlights the risk of **lower spending power** than pre-pandemic times and the emergence of **‘workcation’** (the combination of work activities and vacations). According to experts, the lockdown period pushed many to combine work and leisure when restrictions were lifted. They claim that this new ‘work-from-anywhere’ mentality has come to stay (Lufkin, 2022).

According to the **European Travel Commission** (ETC, 2021), demand driven by **sustainability trends** in tourism and travel consist of:

- ii. Resorting to **individual experiences** that boost a sense of connection, rather than products,
- iii. Seeking **outdoor spaces and activities** off the beaten track,
- iv. **Long stays** at fewer destinations,
- v. Re-emergence of **long-distance train travel**,
- vi. **Supporting local businesses and tourism service providers.**

Furthermore, the World Tourism Organization (UNWTO) has launched a new Tourism Recovery Tracker²⁰ to track the recovery of tourism. The tracker covers key tourism performance indicators by month, regions and subregions allowing for a real time comparison of the sector’s recovery across the world and industries.

The tracker includes data on:

- international tourist arrivals
- seat capacity in international and domestic air routes,
- air travel bookings,
- hotel searches and bookings,
- occupancy rates and
- demand for short term rentals
- travel sentiment (Net Sentiment Score)
- COVID-19 14-day notification rate per 100,000 population

20 <https://www.unwto.org/fr/tourism-data/unwto-tourism-recovery-tracker>

Tourism recovery is gaining momentum in the world. Globally, destinations welcomed almost three times as many international arrivals in the first quarter of 2022 as in the same period of 2021, with Europe leading the industry's rebound. Mediterranean Europe is one of the subregions showing fastest rates of recovery with 70% to 80% of its pre-pandemic levels recovered^{21,22}.

Additionally, the European-Mediterranean tourism sector has also been receiving significant economic support through the **EU Next Generation** funds and the **Resilient and Recovery Plans** (RRP) that are being implemented by the European countries²³. These funds are directly targeted towards the green and digital transition of the economy, in the framework of the **European Green Deal** (EGD).

In order to accelerate the transition to sustainable tourism, it is crucial to understand key aspects to consider making best use of the available funding. The **Handbook on "How to use EU funding for sustainable tourism"**²⁴ informs public authorities and tourism stakeholders in the Mediterranean about funding opportunities for projects contributing to sustainable tourism using two of the most important EU funding instruments, the Recovery and Resilience Facility (RRF) and the European Regional Development Fund (ERDF). They offer important funding opportunities for tourism at local and regional level and aim to inspire and advise readers to best prepare for absorbing these funds at regional and local levels.

Overtourism is a key challenge that needs to be addressed as a small number of destinations concentrate much of tourist influxes, resulting in the degradation of the quality of life for the residents, increase in waste production, disturbances such as noise, and air and sea pollution due to unsustainable travel means. Urban areas, particularly in the Mediterranean Basin, face strategic challenges due to their ever-growing population, which by 2030 will account for 60% of the world's population, and due to business and leisure tourism flows. In view of these challenges, the UNWTO highlights the urgent need to rethink and replan the management of natural resources, socio-cultural conflicts, pressure on infrastructure, mobility and other facilities from a more inclusive perspective. This inclusive management approach must be based on a thorough analysis of residents' perceptions and attitudes towards tourism to ensure the development of successful sustainable tourism strategies²⁵.

2.7 | Digitalisation

Digitalisation is one the two pillars, together with environmental sustainability, of the **EU Recovery strategy**, earmarking major economic investments at member state level. The tourism sector has been a pioneer in adopting **information and communications technology** (ICT) solutions and platforms since the last decades of the 20th century.

The digitalisation of the tourism sector should contribute to diversity in business opportunities and foster the sustainability of the sector.

The digitalisation of the sector is contributing to achieving the Sustainable Development Goals by making it more attractive, efficient, inclusive and economically, socially and environmentally sustainable than before with positive environmental impacts through innovations in manufacturing and efficient use of resources contributing to a more sustainable industry footprint.

Another crucial role of digitalisation is to support the monitoring of the sector through observatories^{26,27} that foster real-time data and provide data-sharing for efficient decision-making, prioritisation and anticipation of challenges by policymakers and stakeholders.

21 <https://www.unwto.org/news/tourism-recovery-gains-momentum-as-restrictions-ease-and-confidence-returns>

22 <https://www.unwto.org/news/international-tourism-consolidates-strong-recovery-admidst-growing-challenges>

23 https://single-market-economy.ec.europa.eu/sectors/tourism/funding-guide_en

24 https://sustainable-tourism.interreg-med.eu/fileadmin/user_upload/Sites/Sustainable_Tourism/horizontal_project/ST_Deliverables_IP_6/ST_IP6_WP5/ST_5_2_2_Handbook_EU_Funding_Sustainable_Tourism_2022.pdf

25 <https://www.e-unwto.org/doi/book/10.18111/9789284420070>

26 <https://shapetourism.interreg-med.eu/index.php?id=13080&path=1>

27 <https://best-med.interreg-med.eu/info-hub/tourism-observatories/>

Furthermore, digitalisation facilitates innovative tools and processes to deal with **challenges such as seasonality and overcrowded areas**. A good example of the use of digital tools to deal with challenges such as overtourism took place in Dubrovnik, where through the Herit Data Interreg Med project²⁸, sensors were put in place to understand flows of visitors in the old town. As a result, policymakers modified a local ordinance to reduce the amount of terraces and public space used by commercial and tourism businesses in the pedestrian areas of the city to ease the flow of visitors and residents (Plan Bleu, 2022).

Six **main drivers** have significant impact on the potential of digitisation in the tourism industry: sales increase, traditional booking, sharing economy, personalised products, social media and customer reviews (Härting, 2017).

Digitalisation is also supporting the **smart destination** mainstream. Smart destinations have a strategy for technology, innovation, sustainability, accessibility and inclusivity along the entire tourism cycle: before, during and after the trip. They also consider local residents' well-being, factoring multilingualism, cultural idiosyncrasies and seasonality into tourism planning²⁹.

During the COVID-19 pandemic, digitalisation was very relevant with **QR codes** for bookings and health certificates in hotels, restaurants and transport and **virtual tourism** was promoted during the pandemic as an alternative to physical tourism. Although virtual tourism does not feel like a visit to a natural destination, it still gets attention from tourists (Akhtar, 2021). Diverse European and Mediterranean initiatives, such as the **Digitourism** project³⁰, are exploring tools and strategies to accelerate the digitalisation of tourism.

However digitalisation raises some additional challenges as not all tourism actors have the necessary **digital skills** to implement the solutions, nor the information and data for the development of new products, and the promotion of environmental and social sustainability. As a result, their interactions with other tourism professionals and clients scale down, and their competitiveness decreases. This is especially applicable for the **southern Mediterranean countries** as they are still undergoing a transition process from economic and political centralisation to economic and political liberalisation (Salman & Monastiriotis, 2018).

Possible solutions to address these challenges exist, such as upskilling and reskilling employees in traditional tourism businesses that have not yet embarked on the digital transition. For **European Mediterranean countries**, the **Pact for Skills**³¹ was launched by the European Commission in 2020 and will support the signatories of the Pact with dedicated services such as:

- 1) **Networking hub**, including: support in finding partners and first meetings of the partnerships; linking with existing EU tools, e.g. Europass, Skills Panorama, EURES and European Network of Public Employment Services; promotion of the activities of the Pact members.
- 2) **Knowledge hub**, including: webinars, seminars, peer learning activities; updates on EU policies and instruments; information on projects, tools instruments and best practices
- 3) **Guidance and resources hub**, including: access to information on relevant EU funding; guidance to identify financial possibilities; facilitation of exchange between the Pact members and national/regional authorities.

28 <https://herit-data.interreg-med.eu/>

29 <https://www.unwto.org/es/digital-transformation>

30 <https://projects2014-2020.interregeurope.eu/digitourism>

31 <https://ec.europa.eu/social/main.jsp?catId=1517&langId=en>



3

REVIEW OF INSTITUTIONAL FRAMEWORKS AND REGIONAL INITIATIVES

This third chapter gives an overview of the institutional frameworks and key initiatives that are linked to the tourism sector. It first looks at what sustainable tourism governance is. Secondly, it presents the international frameworks, the European frameworks and lastly the Mediterranean frameworks that apply to coastal tourism in the scope of this report.

3.1.2 | Networks and partnerships

One example of collaborative partnerships is the multi-level **Global Tourism Plastic Initiative** (GTPI)³³ launched in 2020, where the tourism sector joined efforts with the UN Environment Programme and the Ellen MacArthur Foundation, to reduce plastic pollution in the whole tourism chain. The initiative promotes concrete and actionable commitments by 2025³⁴ (GTPI, 2020).

Another example of such broad inclusion and engagement of actors is the **Network of European Regions for Competitive and Sustainable Tourism** (NECSTouR)³⁵ created in 2007. It is a European platform that gathers European regions to build competitive regional governance for sustainable tourism, tackling the economic, environmental and socio-cultural dimensions of the industry (NT, 2022). The NECSTouR 2019-2021 strategy sets out five key priorities - Smart, Socio cultural, Skills, Safety, Statistics - to address the challenges facing destinations today and support regions to deliver sustainable tourism.

Other initiatives have been promoted by Civil Society Organisations (CSOs) such as the **Future of Tourism Coalition**³⁶. It includes six non-governmental organisations that have come together to stand united in an appeal for change. They have developed and published [Guiding Principles](#) to describe the characteristics of future tourism.

In that sense, the **Mediterranean Ecotourism Consortium**, developed under the DESTIMED PLUS Interreg Med project, would serve as a new working group for a) the exchange of good practices and data among Mediterranean tourism and conservation stakeholders and b) for the monitoring and advocating of relevant policies to accelerate the integration of ecotourism practices in the region.

3.2 | International frameworks and policy initiatives

The set of international environmental agreements, commitments and initiatives impacting the tourism and travel sector has been growing in the past decades, although it is not always well acknowledged and integrated by the relevant stakeholders.

3.2.1 | Paris Agreement and Glasgow Declaration

The **2015 Paris Climate Agreement** (PA) represents the international consensus of 195 countries to decarbonise the global economy by limiting global temperatures to no more than 2°C degrees above pre-industrial levels, and pursuing efforts to limit the temperature increase to 1.5°C above pre-industrial levels. The effectiveness of the Paris Agreement (PA) lies in translating internationally agreed goals into implementable and enforceable goals at the national scale. However, there are sectors that are heavily reliant on fossil fuels, like travel and tourism, whose emissions are expected to grow, thus hindering the PA ambitions (Scott & Gössling, 2018; UNWTO, 2019a).

In preparation for the COP26 of the UN Framework Convention on Climate Change (UNFCCC) in Glasgow (Scotland, UK), in November 2021, a collaborative group of tourism organisations, including UNWTO, UNEP,

³³ <https://www.oneplanetnetwork.org/programmes/sustainable-tourism/global-tourism-plastics-initiative>

³⁴ GTPI's commitments: First, to eliminate problematic or unnecessary plastic packaging and items. Second, to take action to move from single-use to reuse models or reusable alternatives. Third, to engage the value chain to move towards 100% of plastic packaging to be reusable, recyclable or compostable. Fourth, to take action to increase the amount of recycled content across all plastic packaging and items used. Fifth, to collaborate and invest to increase the recycling and composting rates for plastics. Sixth, to report publicly and annually on progress made towards these targets (One Planet, 2022).

³⁵ <https://necstour.eu/>

³⁶ <https://www.futureoftourism.org/about>

VisitScotland and the Travel Foundation, developed the **Glasgow Declaration: A Commitment to a Decade of Tourism Climate Action**³⁷. It is a public and voluntary commitment by tourism stakeholders to **halve emissions by 2030** and reach Net Zero as soon as possible before 2050. Signatories commit to deliver climate action plans within 12 months of signing and implementing them accordingly. The forthcoming UNFCCC COP 27 in Sharm-El-Sheikh, Egypt, taking place from 7-18 November 2022, will be an opportunity to check back on the progress made in the last year.

For the first time, the urgency to move away from “carbon and material-intensive” tourism was clearly recognised in an international declaration, and the need for a “just” transition as well as the differential climate risks of “under-represented and vulnerable groups” were highlighted. The Declaration also urged “to consider not only economic value but rather the regeneration of ecosystems, biodiversity and communities”. It also calls for **mitigation actions** covering the whole tourism value chain and climate footprint, including “transport, infrastructure, accommodation, activities, food & drink, and waste management”³⁸.

3.2.2 | CBD and Aichi targets

The 1992 **Convention on Biological Diversity** (CBD) was launched at the Rio ‘Earth Summit’ as one of the principal international environmental laws. Although tourism is not explicitly mentioned in it, it has increasingly become featured in the decisions of the Conference of Parties (COP) to the Convention, including the development of a specific set of **guidelines on biodiversity and tourism** (Hall, 2010). In 2010, the CBD developed a new strategic plan (2011–2020) to enhance international efforts at stopping degradation and promoting sustainable use of the biological heritage. The plan entailed the twenty ‘Aichi Targets’³⁹, which were to be attained by 2020 (Hvenegaard, Halpenny & McCool, 2012).

As pointed out by Hall (2010), the COP 6, which was held in 2000 in The Hague (the Netherlands) was the first to make a major decision with respect to tourism and biodiversity. Parties were recommended to pay particular attention to “*awareness-raising, information-sharing, education and training of tourism operators and their staff and sensitisation of tourists on biological diversity issues and technical and capacity-building at the local level*” (p. 272). However, nine years later, at COP 15 in Copenhagen (Denmark), more than half of reporting countries had no program under development.

In view of the next strategic plan (2011–2020), others like Hvenegaard et al. (2012) point out that tourism could contribute to several of the **Aichi targets**. However, given the fact that the Aichi targets have not been met and that there is a worrying decline in the world’s biodiversity (IISD, 2022), there are calls from academia and practitioners to provide a better understanding about not only how tourism can be used as a conservation tool, but also about how to bridge the implementation gap at both instrumental and paradigmatic levels (IUCN, 2021b; InterregMed, 2022a; Bergman, 2022; Hoban et al., 2020; Hall, 2010).

3.3 | European frameworks

At the European level, the European Commission (EC) and related European institutions have become a world leader in climate and sustainability policies, promoting ambitious strategies to deal with climate change and environmental degradation (European Green Deal), ensuring climate mitigation and adaptation (EU Climate Law and EU Adaptation Strategy), and supporting Blue Economy or sectoral transition pathways.

³⁷ <https://www.oneplanetnetwork.org/programmes/sustainable-tourism/glasgow-declaration>

³⁸ <https://www.oneplanetnetwork.org/programmes/sustainable-tourism/glasgow-declaration>

³⁹ Strategic goals (A-E) of the 20 Aichi targets: A: Address the underlying causes of biodiversity loss by mainstreaming biodiversity across government and society B: Reduce the direct pressures on biodiversity and promote sustainable use C: To improve the status of biodiversity by safeguarding ecosystems, species and genetic diversity D: Enhance the benefits to all from biodiversity and ecosystem services E: Enhance implementation through participatory planning, knowledge management and capacity building (CBD, 2020)

3.3.1 | The European Green Deal

The **European Green Deal** (EGD), launched by the European Commission in 2019, aims to transform the EU into a modern, resource-efficient and competitive economy, ensuring⁴⁰:

- No net emissions of greenhouse gases by 2050,
- Economic growth decoupled from resource use,
- No person and no place left behind.

One third of the €1.8 trillion in investments from the NextGenerationEU Recovery Plan, and the EU’s seven-year budget finance the European Green Deal (EGD). The European Commission also adopted a set of proposals to make the EU’s climate, energy, transport and taxation **policies fit for reducing net greenhouse gas emissions by at least 55% by 2030**, compared to 1990 levels.

The **Next Generation EU Recovery plans**⁴¹ is providing €750 billion to the Member States toward a **Green and Digital economy** to recover from the pandemic, with a significant amount targeted at Mediterranean countries as they have been the most affected by the socio-economic impacts of the pandemic (Eco-union & CONAMA, 2020).

3.3.2 | EU Transition Pathway for Tourism

In June 2021, the **European Commission** (EC) launched industry transition pathways to accelerate the green and digital transitions and increase the resilience of the EU industrial ecosystems. The **EU Transition Pathway for Tourism** focuses on the co-implementation of **green and digital** measures through a collaboration platform, to improve tourism destination management (Figure 2).

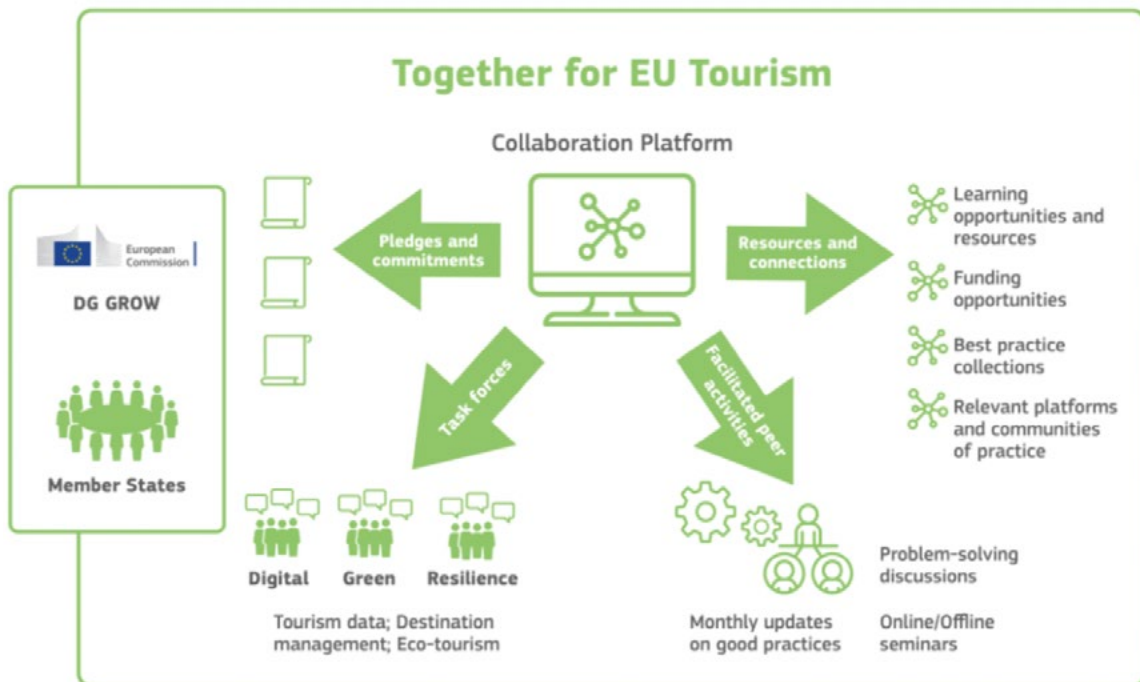


Figure 2. Collaboration platform for the EU Transition Pathway for Tourism

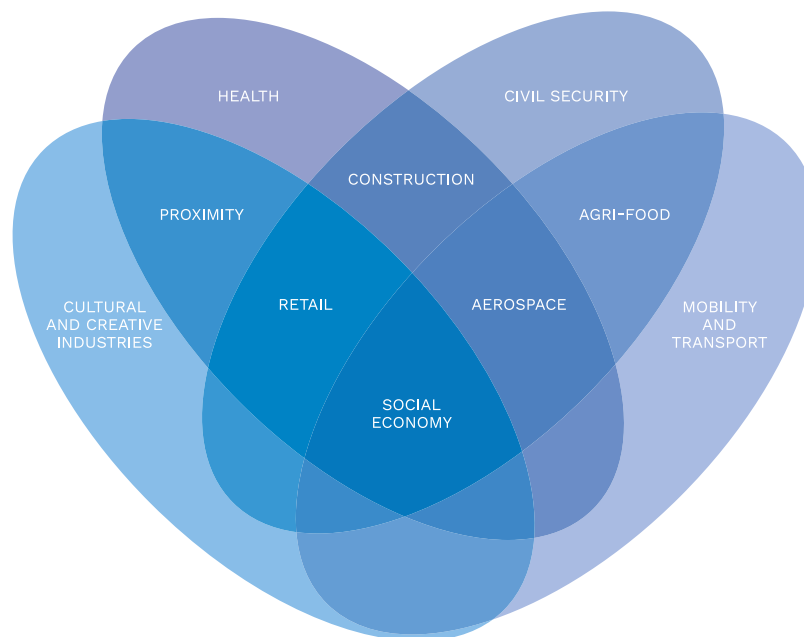
40 <https://ec.europa.eu/info/strategy/priorities-2019-2024/european-green-deal>

41 https://ec.europa.eu/info/strategy/recovery-plan-europe_en

According to the EC, **green transition in tourism** consists of “making tourism more environmentally friendly and implementing several ongoing legislative initiatives relating to environmental protection and climate neutrality” (EC, 2022b, p.6). To foster a green transition in the tourism sector, the EC proposed a series of legislative initiatives, including Implementing Directive (EU) 2019/904 on **single-use plastics**; proposing EU nature restoration targets; boosting a sustainable **Trans-European Transport Network** with long-distance, night and cross-border passenger rail services; and proposing targets to **reduce food waste**, and revising the **Energy Efficiency** Directive.

The **digital tourism transition** is characterised by “the need for accessing data, both publicly and privately held, specially for tourism providers to foster uptake of innovative technologies in order to provide resource-efficient and innovative services”(EC, 2022b, p.6). The EC introduced a framework for improved data-sharing, new rules for online digital platforms and an initiative to facilitate multimodal ticketing as part of the sustainable and smart mobility strategy to bolster tourism sustainability. This was motivated by the need for governments to embrace open data and other digital strategies to ensure evidence-based policies and inclusive participation in digitalising tourism.

Overall, the **EU Transition Pathway for Tourism** puts emphasis on taking joint action to support tourism’s transition to a green and digital sector. Therefore, the EC highlights the importance of promoting synergies across cultural and creative industries, health, mobility, transport and the automotive industry, retail, aerospace, agri-food, construction, proximity, social economy and civil security areas, as illustrated in Figure 3 (EC, 2022b).



Source: Plan Bleu

Figure 3. Synergies between the tourism industry and the green and digital transitions

The EU Transition Pathway for Tourism launched a co-creation process⁴² broadly involving public and private stakeholders across sectors and at different levels in order to support the green and digital transition in a way which would help to recover from COVID and increase the long-term resilience of the sector. This co-creation process took place in two phases and invited all stakeholders to submit commitments and concrete pledges for action through an online call for commitments, a key element of joint implementation. The next set of pledges will be published in autumn 2022.

42 <https://ec.europa.eu/eusurvey/runner/Together4EUTourism>

However, this report highlights that other synergies between the green and digital tourism transition, in the framework of the **EU Transition Pathway for Tourism**, can also be found between other EU institutional frameworks as highlighted below.

3.3.3 | EU Blue Economy Strategy

In May 2021, the EC published its new strategy for a **Sustainable Blue Economy**⁴³ and in May 2022 it launched the fifth (most recent) edition of the **EU Blue Economy report**⁴⁴ (EC, 2022d). That strategy aims to transform the EU's economy, to keep on track with the international **2030 Agenda** and the **European Green Deal**. It focuses on achieving social, environmental and economic sustainability in industries and sectors related to ocean and coasts, including “coastal tourism” (EC, 2021, p.1).

Studies show that if the **ocean economy** was compared to a national economy, it would be the seventh largest in the world, mainly due to coastal tourism revenues⁴⁵. However, although the wealth aspects provided by the ocean are clear and the utilisation of certain ocean resources is widely accepted, the sustainable use of these resources is fundamental and should not be overlooked to achieve a just ocean economy, as claimed by many like Bennet et al. (2021), Farmery et al. (2021) and Schutter et al., (2021). One tool to balance land-sea interactions - in terms of space competition across different coastal and maritime activities- is Marine Spatial Planning (MSP) (Swart & van der Haar, 2017). MSP is specially relevant for Integrated Coastal Zone Management (ICZM), a multidisciplinary approach adopted by the seventh protocol of the Barcelona Convention which promotes the sustainable development of coastal zones. For this, the document entitled “Common Regional Framework for Integrated Coastal Zone Management” needs to be considered as the strategic instrument with the main objective of introducing MSP within the Barcelona Convention to facilitate the implementation of the ICZM Protocol from 2020 to 2027.

The 2022 fifth edition of the **EU Blue Economy report** (EC, 2022d) puts special emphasis on other impacts besides land-sea conflicts, such as ongoing geo-political changes (Russia's invasion of Ukraine) and their implications on maritime security and surveillance, increasing energy and commodity prices, evolving governance frameworks such those originating from the ambitious European climate and energy policies (‘Fit for 55’ package). This edition also analyses the post **COVID-19 effects** on various sectors such as **coastal tourism** (in section 4.7 of the EC, 2022d report), and includes an assessment of the impact of **rising sea levels** on Member States' Gross Domestic Product (GDP). This points to the urgency of the climate crises as seen later in the report's next chapter. All in all, the **EU Blue Economy Strategy** is complemented by other frameworks with a broader Mediterranean focus, as highlighted below.

3.4 | Mediterranean frameworks and regional policies

At the Mediterranean level, the main reference remains the decisions, protocols and strategies approved by the Contracting Parties of the Convention for the Protection of the Marine Environment and the Coastal Region of the Mediterranean (Barcelona Convention). Its recent decisions are considered in this chapter as well as the Post-2020 Mediterranean Marine Protected Areas (MPA) roadmap, the Blue Economy initiatives from the Union for the Mediterranean (UfM) and EU-funded projects and programs such as Interreg-Med and ENI CBC Med.

⁴³ <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52021DC0240&qid=1624869846426&from=EN>

⁴⁴ <https://op.europa.eu/en/publication-detail/-/publication/156eecd-d7eb-11ec-a95f-01aa75ed71a1>

⁴⁵ The Group of Seven (G-7) is an intergovernmental organisation made up of the world's largest developed economies: France, Germany, Italy, Japan, the United States, the United Kingdom, and Canada.

3.4.1 | Barcelona Convention

The 1976 Convention for the Protection of the Marine Environment and the Coastal Region of the Mediterranean, also called the **Barcelona Convention**⁴⁶, is the institutional framework for cooperation in addressing common challenges related to marine environmental degradation. It has **seven protocols**⁴⁷ which form the legal framework of the **Mediterranean Action Plan** (MAP), the principal regional legally binding **Multilateral Environmental Agreement** (MEA) in the Mediterranean. The Convention, signed by 22 Contracting Parties⁴⁸, seeks to boost regional and national plans to achieve sustainable development in the region. Therefore, enhancing enforcement and compliance with this legal framework is central for Mediterranean countries (IUCN, 2021).

In this regard, the **Marine Spatial Planning** tool is key to managing sea and ocean use consistently and achieving the three objectives of the **ICZM Protocol** VII (and its common regional framework⁴⁹) in relation to tourism, which are:

- 1) to encourage sustainable coastal tourism that **preserves coastal ecosystems**, natural resources, cultural heritage and landscapes;
- 2) to promote specific forms of coastal tourism, including **cultural, rural and ecotourism**;
- 3) regulate the practice of **sporting and recreational activities** (Fosse et al., 2021).

There are coastal policies and strategies under the Barcelona Convention promoting sustainable tourism, such as the **Mediterranean Strategy for Sustainable Development 2016-25** (MSSD)⁵⁰ and the **Regional Action Plan on Sustainable Consumption and Production in the Mediterranean (SCP AP)**⁵¹ as well as the **Protocol on Integrated Coastal Zone Management in the Mediterranean (ICZM Protocol)** and its **Conceptual Framework for Marine Spatial Planning in the Mediterranean**.⁵²

The tourism sector is also considered in the MED 2050 Programme⁵³, which aims to confront several visions of the future of the Mediterranean in 2050 and to co-construct solid and realistic transition paths towards common objectives of sustainable development.

The most recent highlights of the Barcelona Convention belong to the **COP22**, which was held in Antalya (Türkiye) last December 2021. As the Mediterranean is highly impacted by ship emissions -because it hosts the world's busiest shipping lane (IMO, 2022)-, the Conference adopted the designation of the Mediterranean Sea as an **Emission Control Area** (ECA) for Sulfur Oxides (SOx)⁵⁴ (known as ECA Sox Med) which was set to "prevent, reduce and control emissions of sulfur oxides and particulate matter from ships" (UNEP, 2021, p.577). COP 22 thus paved the way for the **ECA Sox Med** to potentially enter into force in January 2025.

Lastly, in 2022, the Contracting Parties of the Barcelona Convention adopted the **Post-2020 Strategic Action Programme for the Conservation of Biological Diversity in the Mediterranean Region (Post-2020 SAP BIO)**⁵⁵ with one specific action (nº25) to monitor the impact of coastal tourism, within Goal 2: "Ensure that biodiversity is preserved and maintained or enhanced in order to meet people's needs», integrating a target on cross-sectoral integration, including tourism (T 2.8).

46 <https://www.unep.org/unepmap/who-we-are/barcelona-convention-and-protocols>

47 Barcelona Convention's 7 protocols are: I) Dumping Protocol adopted in 1976 (from ships and aircraft), II) Prevention and Emergency Protocol adopted in 1976 (pollution from ships and emergency situations), III) Land-based Sources and Activities Protocol adopted in 1980, IV) Specially Protected Areas and Biological Diversity Protocol adopted in 1982, V) Offshore Protocol (pollution from exploration and exploitation) adopted in 1994, VI) Hazardous Wastes Protocol adopted in 1996, VII) Protocol on Integrated Coastal Zone Management (ICZM) adopted in 2008 (EC, 2022c).

48 The Barcelona Convention's 22 Contracting Parties are: Albania, Algeria, Bosnia and Herzegovina, Croatia, Cyprus, Egypt, the European Union, France, Greece, Israel, Italy, Lebanon, Libya, Malta, Monaco, Montenegro, Morocco, Slovenia, Spain, Syrian Arab Republic, Tunisia, Türkiye.

49 https://wedocs.unep.org/bitstream/handle/20.500.11822/31703/19ig24_22_2405_eng.pdf

50 <https://www.unep.org/unepmap/what-we-do/mediterranean-strategy-sustainable-development-mssd>

51 <https://switchmed.eu/policy/regional-action-plan-sustainable-consumption-production/>

52 <http://paprac.org/storage/app/media/Meetings/MSP%20Conceptual%20Framework%20EN.pdf>

53 <https://med2050.org/?lang=en>

54 <https://planbleu.org/wp-content/uploads/2022/02/ZOOM-ON-Med-SOX-ECA-English.pdf>

55 <https://www.rac-spa.org/sapbio>

3.4.2 | Mediterranean MPA roadmap

The **Mediterranean Marine Protected Area** (MPA) roadmap (2012-2020)⁵⁶ defines the steps that Mediterranean countries, relevant organisations and other stakeholders could individually and/or jointly undertake to achieve the 2020 objectives set for the MPA network in the Mediterranean. The post-2020 MPA roadmap stemmed from a participatory process which started in October 2020, including all stakeholders involved with MPAs in the Mediterranean and was developed by the **Mediterranean Protected Areas Network** (MedPAN) and the **Regional Activity Centre for Specially Protected Areas** (RAC/SPA).

The third edition of the **MPA Forum**⁵⁷ took place in November-December 2021 with the participation of the Mediterranean MPA community. The Forum's programme was focused on the **post-2020 MPA roadmap** and the development of an implementation framework aligned with the post-2020 global biodiversity framework of the Convention on Biological Diversity and with the post-2020 regional strategy for MPAs in the Mediterranean.

Additionally, in view of the **2020-2030 Ocean Decade**, the new draft roadmap⁵⁸ integrates MPAs and other effective area-based conservation measures⁵⁹ across different blue economy sectors, including **tourism, cruises and recreational boating** (PB, 2022).

3.4.3 | Blue Med initiative

In 2014, the **Blue Med initiative**⁶⁰ was launched under Italy's coordination with other EU Member States of the Mediterranean Basin (i.e., Cyprus, Croatia, France, Greece, Malta, Slovenia, Spain and Portugal). The initiative is supported and facilitated by the European Commission and seeks to jointly create new 'blue' jobs and sustainable industrial growth in the marine and maritime sectors of the Mediterranean area. Amongst several other actions (BM, 2022), the Blue Med initiative is working to improve **knowledge of the land-sea nexus** and develop **coastal ecological engineering solutions** and measures to achieve good environmental status⁶¹. Given that blue tourism finds itself in this land-sea interface, it is relevant to coordinate efforts with the Blue Med initiative.

3.4.4 | Union for the Mediterranean

In 2015, the **Union for the Mediterranean** (UfM) promoted the *Ministerial Declaration on the Sustainable Blue Economy*⁶² for the entire Mediterranean region. The declaration sets out to promote jobs, innovation and knowledge-based business opportunities through the development of key maritime sectors. It is a collaborative, regional approach led by 42 Ministers from the UfM countries. In view of the multiple crises of 2021 (COVID-19, climate change and biodiversity loss) they all agreed to re-strengthen their commitment to the sustainable blue economy in the Mediterranean. **The Mediterranean Blue Economy Stakeholders platform**⁶³ was launched and a guide with tools for relaunching a sustainable post COVID-19 tourism model was published (UfM, 2022). Finally, the **WestMED**⁶⁴ initiative was recognised as a successful example of cooperation and a catalyst for the development of a sustainable blue economy.

56 https://www.rac-spa.org/sites/default/files/action_plans/fdr_en.pdf

57 <https://medmpaforum.org/>

58 <https://medmpaforum.org/en/actualites-2020-2021>

59 Other conservation measures are: traditional agricultural systems, sacred natural sites, historic shipwrecks, protected water catchments and hunting reserves (IUCN-WCPA, 2019).

60 <http://www.bluedmed-initiative.eu/>

61 The Good Environmental Status (GES) is defined in the EU legislation - Marine Strategy Framework Directive - for marine waters where these provide ecologically diverse and dynamic oceans and seas which are clean, healthy and productive.

62 <https://ufmsecretariat.org/ufm-ministerial-conference-blue-economy/>

63 <https://medblueeconomyplatform.org/>

64 <https://www.westmed-initiative.eu/>

3.4.5 | Interreg MED

Founded in 2014, **Interreg MED** is a European cooperation programme that initially brought together 13 European countries for the promotion of sustainable growth and development in the Mediterranean. The programme is co-financed by the European Regional Development Fund (ERDF) and the **Instrument of Pre-Accession** (IPA) and national contributions (IM, 2022b, n.p).

The new phase of the Interreg Med programme is the Interreg Euro-MED programme⁶⁵, a European Territorial Cooperation Programme that aims to make the Mediterranean region smarter and greener and improve the governance between its stakeholders. It supports projects, initiatives and policies related to climate change and the environment in line with the priorities and specific objectives set out by the European Commission for the Cohesion policy. Participation in this new programme has expanded and now includes 69 regions of 14 countries from the northern Mediterranean: 10 EU Member States and 4 countries from the Instrument for Pre-Accession Assistance (IPA).

During the previous programming period (2014–2020), the Sustainable Tourism Interreg MED horizontal project (2019–2022)⁶⁶, new phase of the BlueTourMed project (2016–2019) relied on 30 thematic projects involving over 200 organisations (mainly public authorities, universities, NGOs and international organisations) active in 13 European countries to promote sustainable tourism by capitalising on tools and good practices developed by its projects.

The main goal of the second phase is to mainstream the results of the projects into European, national, regional and local policies, while considering how they can contribute to green and digital post-Covid tourism recovery and the EU Green Deal challenges by:

- Enhancing attractiveness and tourism offerings with alternatives to mass tourism;
- Addressing tourism pressures by reducing the impact of tourism;
- Improving planning and management practices by measuring sustainability.

The results and lessons learned from Community projects provide a unique knowledge asset that can help the transition to innovative tourism policies and practices based on sustainability principles.

The STC, with its 30 thematic projects, has contributed to fostering sustainable Mediterranean tourism by:

- Enhancing resilience of the tourism sector in coastal destinations;
- Improving resource efficiency and environmental conservation measures;
- Increasing innovation and use of new technologies in tourism planning and decision-making;
- Improving cooperation and governance at different levels.

Mediterranean coastal regions drafted the **Bologna charter**⁶⁷ to strengthen the **role of Coastal Administrations** in the context of European policies and initiatives at the Mediterranean scale, such as coastal protection, integrated management or adaptation to climate change. The “Charter” also promoted a Macro-Project initiative for a coherent Mediterranean macro-thematic and multi-sectoral strategy, also open to the southern and eastern Mediterranean coasts.

In 2017, the **Sustainable Tourism Community** (STC) of the Interreg MED Programme⁶⁸ signed the **Athens Declaration for Sustainable Tourism**⁶⁹ (an updated version of this Declaration will be published in 2022 as result of the new phase of the STC - 2019–2022) to boost greater engagement of regional policy makers and stakeholders and drive sustainable changes both at policy and management levels (ERDF, 2017).

⁶⁵ <https://interreg-euro-med.eu/en/>

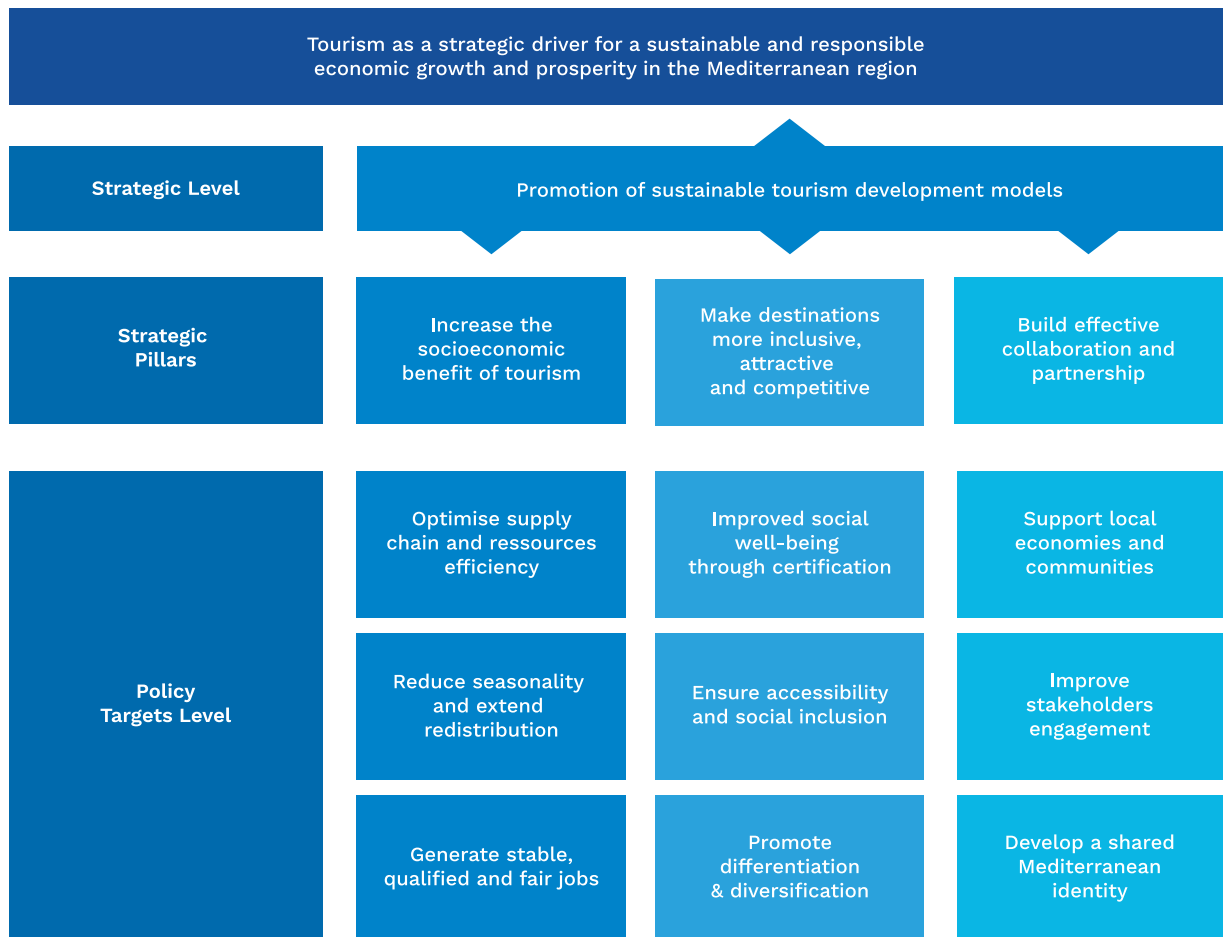
⁶⁶ <https://sustainable-tourism.interreg-med.eu/>

⁶⁷ <http://www.bolognacharter.eu/>

⁶⁸ <https://sustainable-tourism.interreg-med.eu/about-us/our-partnership/>

⁶⁹ <https://www.uni-med.net/en/athens-declaration-for-a-sustainable-tourism/>

Overall, the common strategic pillars of the strategies are increasing the socio-economic benefit of tourism, making destinations more inclusive, attractive and competitive and building effective collaboration and partnership (as illustrated in Figure below).



Source: IM, 2019a, p.4

Figure 4. The transition towards sustainable tourism development models

Tourism-related endeavours from the **Athens declaration** addressed the following themes:

- i. Effective **monitoring of tourism** sustainability;
- ii. **Alternative tourism models** to reduce pressures;
- iii. Tourism as a strategic driver for **inclusive, responsible and sustainable growth**; and
- iv. Governance as a tool for sustainable and responsible tourism.

The discussions resulted in different policy papers that in turn provided a set of **policy factsheets**⁷⁰ and **policy recommendations**⁷¹ to accelerate the tourism transition and make destinations more inclusive, responsible, attractive and competitive (IM, 2019c p.14-17). In addition, other projects of the Sustainable Tourism Community stand out for their impacts in the Mediterranean besides those described in the Case Studies Annex dealing with challenges such as lack of governance, circularity of the sector, seasonality and alternative models of tourism.

⁷⁰ <https://sustainable-tourism.interreg-med.eu/policy-factsheets/>

⁷¹ <https://sustainable-tourism.interreg-med.eu/news-events/news/detail/actualites/policy-recommendations-by-the-med-sustainable-tourism-community/>

3.4.6 | ENI CBC Med

The ENI CBC “Mediterranean Sea Basin Programme”⁷² is the largest Cross-Border Cooperation (CBC) initiative implemented by the EU under the European Neighbourhood Instrument (ENI). The programme brings together the coastal territories of **14 Mediterranean countries** to fund innovative, inclusive and sustainable development cooperation on both sides of the sea. Projects are grouped into **4 thematic clusters**:

- i. Business and SME development;
- ii. Technological transfer and innovation;
- iii. Social inclusion and fight against poverty;
- iv. Environment and climate change.

The first cluster (Business and SMEs) has a specific programme on **Sustainable Tourism** (A1).

As described in the case studies chapter, several tourism projects are being implemented to reduce environmental impact and improve socio-economic benefits. For example, **CROSSDEV**⁷³ promotes cultural Routes for Sustainable Social and Economic Development in Italy, Jordan, Lebanon, Palestine. **RESTART MED!**⁷⁴ offers a guideline to assess and monitor sustainability in tourism policies in Italy, Spain, Lebanon, Jordan, Tunisia. **MEDPEARL**⁷⁵ promotes the Mediterranean as an innovative, integral and unique destination for Slow Tourism initiatives in Spain, Egypt, Greece, Jordan, Italy, and Palestine.

⁷² <https://www.enicbcmed.eu/>

⁷³ <https://www.enicbcmed.eu/projects/crossdev>

⁷⁴ <https://www.enicbcmed.eu/projects/restart-med>

⁷⁵ <https://www.enicbcmed.eu/projects/med-pearls>



4

MAIN CHALLENGES FACED BY MEDITERRANEAN TOURISM

This chapter presents key environmental and socio-economic challenges⁷⁶ that Mediterranean tourism currently faces. It includes the results of the survey answered by key Mediterranean stakeholders (see Annex II) and considers biodiversity preservation and regeneration difficulties as well as the circularity of tourism services and the social inequality and issues related to recovery from the COVID-19 pandemic.

⁷⁶ There are other relevant challenges for the tourism industry such as labour precariousness, insecurity, financialisation of housing and gentrification which are out of the scope of this report, but deserve further attention for a future Mediterranean Strategy for Sustainable Tourism.

4.1 | Overview of critical issues

Global tourism has grown steadily for over six decades. In the Mediterranean region, the number of ITAs, the market situation and the GDP and job creation linked to tourism have grown too, but with a price to be paid. **Critical issues** identified in the Mediterranean tourism sector in 2017 are highlighted below (Fosse & Le Tellier, 2017, p.16).

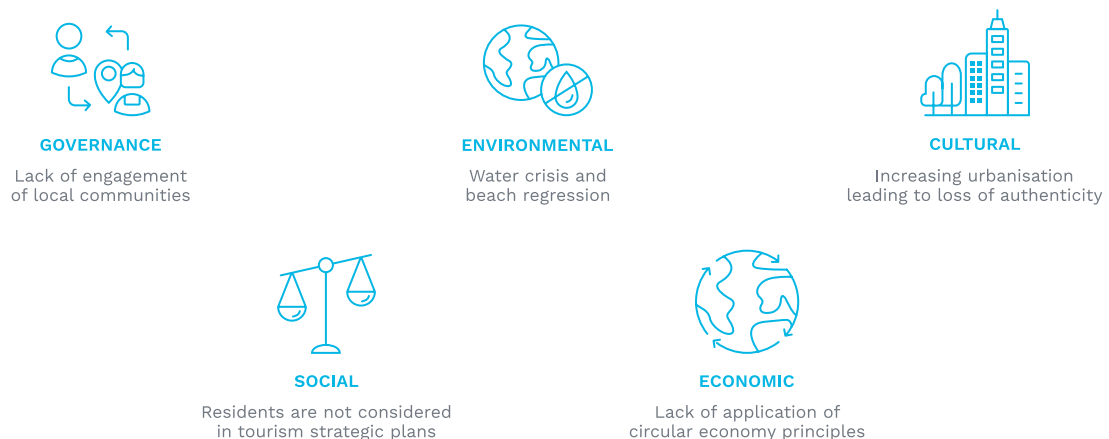


Source: Fosse & Le Tellier, 2017, p.16

Figure 5. Critical issues in the Mediterranean tourism sector

The survey aimed to better identify the progress and remaining issues in Mediterranean tourism to reflect an **updated version of the major threats** and key stakeholders from the Mediterranean countries invited to participate. A specific part of the survey was dedicated to the main issues and obstacles related to coastal tourism in the Mediterranean considering the following areas: environmental, governance, cultural, social and economic issues. These main threats are as follows.

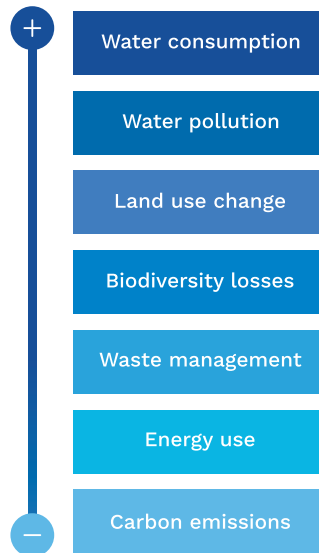
- **Water scarcity, beach regression and ecosystem degradation.**
- **Lack of participation** of local communities in governance processes.
- **Inefficiencies** in resource use and lack of competitiveness.
- **Increasing urbanisation** as a threat to cultural heritage.
- **Lack of application of circular economy** principles.



Source: Plan Bleu

Figure 6. Mediterranean tourism critical issues (2022)

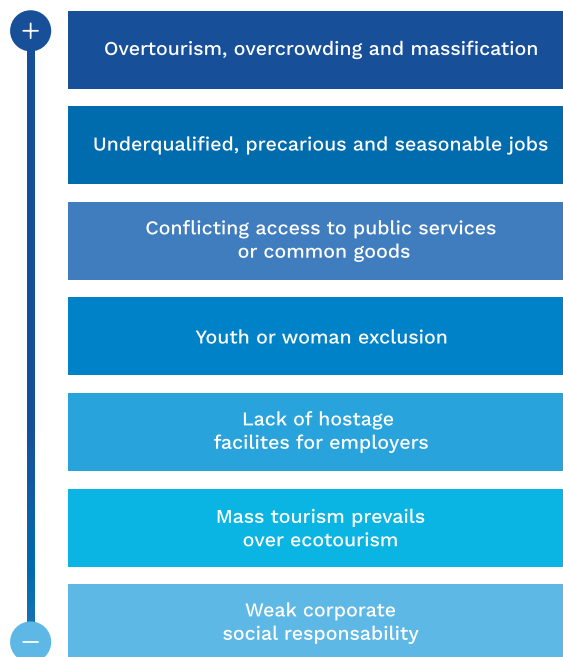
It is important to note that the challenges outlined in 2017 by Fosse & Le Tellier have not been overcome, yet some of them have been exacerbated. The consultation process urged prompt action with respect to these threats. As stressed by participants: ‘addressing the climate crises in tourism is decisive for the continuity of the industry’. Respondents of the consultation also expressed the most concerning **environmental challenges** (by order of priority).



Source: Plan Bleu based on the STC survey's results

Figure 7. Main environmental challenges of Mediterranean tourism (STC, 2022)

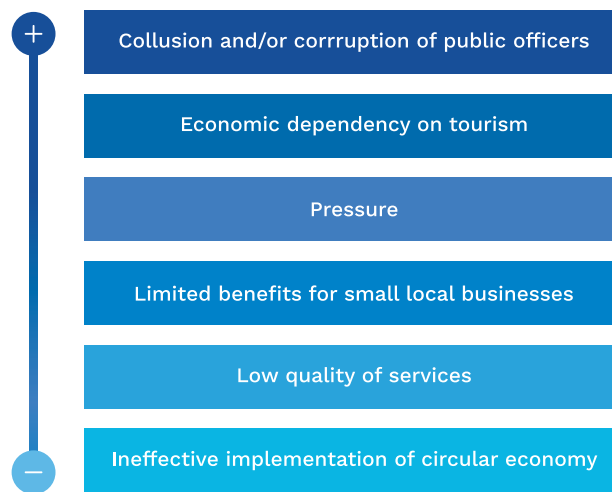
With regards to the **social aspects** impacting tourism, stakeholders highlighted the most pressing issues (by order of priority) as follows.



Source: Plan Bleu based on the STC survey's results

Figure 8. Main social challenges of Mediterranean tourism (STC, 2022)

Lastly, the survey revealed the most important **economic problems** (by order of priority) as listed below.



Source: Plan Bleu based on the STC survey's results

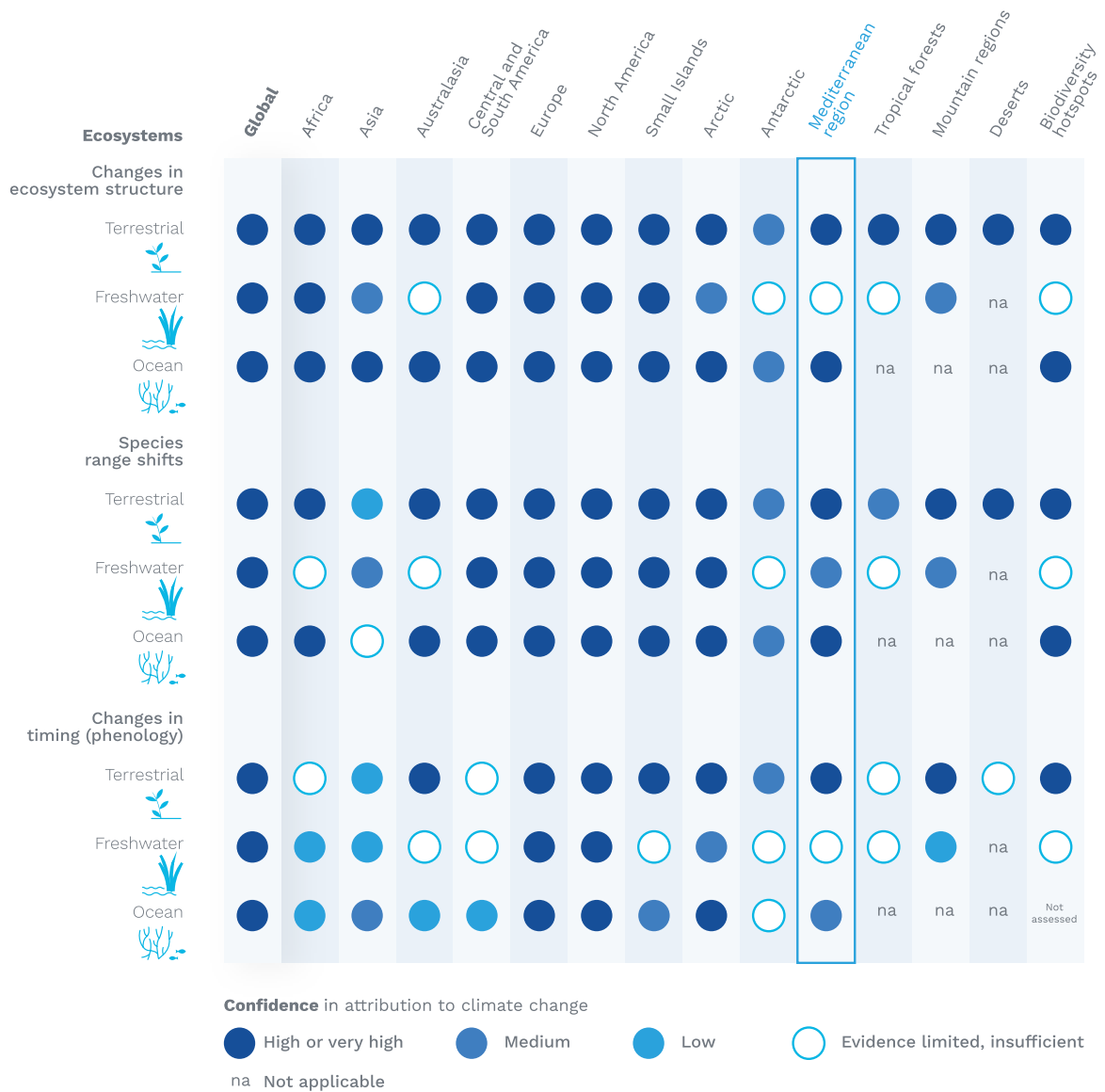
Figure 9. Main economic challenges of Mediterranean tourism (STC, 2022)

Overall, the survey detected similar challenges to those previously identified and developed in the following pages.

4.2 | Climate change adaptation and mitigation

Mediterranean climate regions host some of the most threatened land, freshwater and ocean ecosystems in the world. Their natural resources and the beauty of their coastal areas have made them **popular destinations for visitors**. While a healthy natural environment is an asset for tourism, it generates many pressures such as high water use, waste generation and accumulated emissions from air, road and sea transport, especially in peak seasons. On top of that, the **climate change** crisis exacerbates these threats, particularly along coasts. The Mediterranean is already a climate change **hotspot**, warming 20% faster than the rest of the globe (MedECC, 2020).

Coastal areas are especially prone to a number of climate change related impacts, such as flooding, erosion, saltwater intrusion, increase in temperatures and periods of drought (WWF, 2021; Piroddi, Colloca, & Tsikliras, 2020). These have severe direct and indirect effects on coastal and maritime tourism. To cope with the impacts of climate change and maintain resilient tourism facilities and activities, the Mediterranean tourism industry needs to implement **mitigation and adaptation strategies** now (EC, 2022d). This in turn represents other challenges as highlighted below.



Source: IPCC, 2022, p. 12

Figure 10. Observed impacts of climate change on the world and the Mediterranean region

Tourism is a highly **climate-sensitive** yet vulnerable economic industry, not only in the northern Mediterranean (Jurema et al., 2017) but also in the southern countries (Heger et al. 2022). It contributes significantly to **global carbon emissions**, mainly because of air travel and (fossil) energy use (Lenzen, 2018). It also suffers the **impacts of climate change** through the following threats:

- 01. Sea level rise** is making human settlements and tourism facilities highly exposed to floods, erosion and to saltwater intrusion into freshwater aquifers.
- 02. Increasing extreme events'** intensity and frequency, with their impact on coastal erosion and significant damage, are raising insurance costs and leading to business disruption, evacuation costs, rebuilding costs and impacting the image/brand of tourist destinations.
- 03. Air temperature changes** (i.e. warmer winters and summers) and changing precipitation patterns are affecting tourist demand, and therefore the offering.
- 04. Increasing sea surface temperatures** are affecting marine species metabolism, distribution and phenology, which is a threat for biodiversity as well as hospitality.

Tourism climate mitigation actions seek to reduce the sector’s impact (i.e. reduction of greenhouse gases), while adaptation actions focus on reducing the harms and the sector’s vulnerability (e.g. by building resilient infrastructure). Altogether, addressing the management of climate change within tourism is difficult because all mitigation and adaptation actions (seen in Table 1 and Table 2) need **systemic changes**, namely social and economic changes, to propel forward the transition of the industry and changes in our relationship with nature.

		ACTION					
		Air transport	Car transport	Train/coach transport	Destination	Accommodation	Activities
ACTOR	Tourists	Minimize	Minimize/electrify	Use train and coach	Stay longer, favor closer destinations	Environmental certified	Avoid energy intense activity
	Tour operators	Offer carbon offsetting, propose low-carbon alternatives (rail, coach)	Energy efficient cars	Develop packages based on train and coach	Provide carbon labelling	Cooperate with certified apartments/hotels/houses	Offer activities that reduce transport
	Destination managers and planners	Focus on revenue (not growth). Increase length of stay. Promote domestic tourism. Green marketing strategy	Promote low-carbon public transport systems	Offer attractive transport solutions	Involve all actors to become a sustainable destination	Promote eco-certifications	Develop low transport activities

Source: Adapted from Simpson et al., 2008, p.102

Table 1. Climate change mitigation actions for tourism actors

		ACTOR			
		Tourism Operator	Tourism Industry Associations	Governments and Communities	Financial Sector
ADAPTATION TYPE	Technical	Water recycling systems	Enable access to early warning equipment to tourism operators	Reservoirs and desalination plants	Require advanced building design or material standards
	Managerial	Water conservation plans	Encourage environmental management (certifications)	Impact management plans	Adjust insurance premiums or not renew insurance policies
	Policy	Comply with water regulation	Implement adaptation projects	Coastal management plans	Consideration of climate change in credit risk and project finance assessments
	Research	Develop practical plans on drought and floods management	Assess awareness of businesses and tourists and knowledge gaps	Monitoring programs (e.g., predict droughts and floods)	Extreme event risk exposure
	Education	Water conservation education	Public education campaigns	Water conservation campaigns	Educate potential and existing customers
	Behavioural	Reduce water footprint	Water conservation initiatives	Extreme event recovery marketing	Good practice in-house

Source: Adapted from Simpson et al., 2008, p.53

Table 2. Climate change adaptation actions on water use for tourism actors

4.3 | Biodiversity preservation and regeneration

The Mediterranean is a semi-enclosed sea with multiple types of coastlines, including deltas, coastal plains, high cliffs, and mountainous areas, providing various natural and anthropogenic landscapes, and multiple types of seabeds hosting diverse ecosystems and habitats. Mediterranean coastal ecosystems include wetlands, coastal aquifers, forests, agricultural land and soft and rocky shores (Plan Bleu, 2020), and thanks to these exceptional natural resources and the unique combination of mild climate, authenticity, rich history and cultural heritage security, the Mediterranean region is the world's leading tourist destination as well as the world's second largest destination for cruise ships.

The Mediterranean Sea is a **biodiversity hotspot**, it hosts numerous **endemic species**⁷⁷, with the highest rate of endemism globally. Biodiversity is an asset for coastal tourism in the Mediterranean and all forms of tourism rely directly on ecosystem services and biodiversity, from the 3S mass tourism model to ecotourism.

However, human induced pressures and climate change impacts have been contributing to biodiversity loss and when it comes to species, projections suggest that more than 30 endemic species will become extinct by the end of the century⁷⁸.

The tourism sector is a critical sector for the Mediterranean, offering economic opportunities and job creation, but its development can trigger radical changes in the region and lead to a series of undesirable side effects. A clear example is the **regression of *Posidonia oceanica***, a seagrass species endemic to the Mediterranean Sea and with very high carbon absorption capacity which also plays an important role in preventing coastal erosion when their banquettes are well managed. *Posidonia oceanica* enriches the waters and the atmosphere with oxygen, absorbs carbon and stores it on the seabed and acts as a natural water filtration system, trapping particles and pathogenic microorganisms⁷⁹. *Posidonia oceanica* is projected to lose 70% of its habitat by 2050 with a potential for functional extinction by 2100 (IPCC, 2019).

The tourism sector can also trigger impacts such as collisions with marine mammals, unsustainable use of resources, marine litter and anchoring and mooring on *posidonia oceanica*. The Mediterranean region is already developing measures to reduce the negative impacts of these issues, for instance with the development of a Particularly Sensitive Sea Area (PSSA) in the north-western Mediterranean Sea in order to prevent and reduce collisions between large whales and ships, as well as "Guidelines for the sustainability of cruising and recreational boating in the Mediterranean region" and local and regional action plans to deal with the current situation.

Preserving and regenerating biodiversity in the Mediterranean region is challenging but fundamental (UNEP/ MAP & Plan Bleu, 2020). The urgent transition needs to consider the carrying capacity of sensitive areas such as coastal areas, protected areas and islands and pave the way by inspiring successful initiatives that mitigate the current impacts of the sector and diversify the tourism model offerings to include sustainability models through ecotourism, gastronomic, cycling, inland, cultural, and underwater tourism products.

⁷⁷ Endemic species are those which belong to or are native to a particular area. Therefore, the ratio of endemic species varies within the taxonomic groups.

⁷⁸ <https://www.unep.org/unepmap/resources/factsheets/biological-diversity#:~:text=From%201950%2D2011%2C%20the%20Mediterranean,the%20end%20of%20the%20century>

⁷⁹ https://posbemed2.interreg-med.eu/fileadmin/user_upload/Sites/Biodiversity_Protection/Projects/POSBEMED2/POSBEMED2-poster-014-EN.jpg

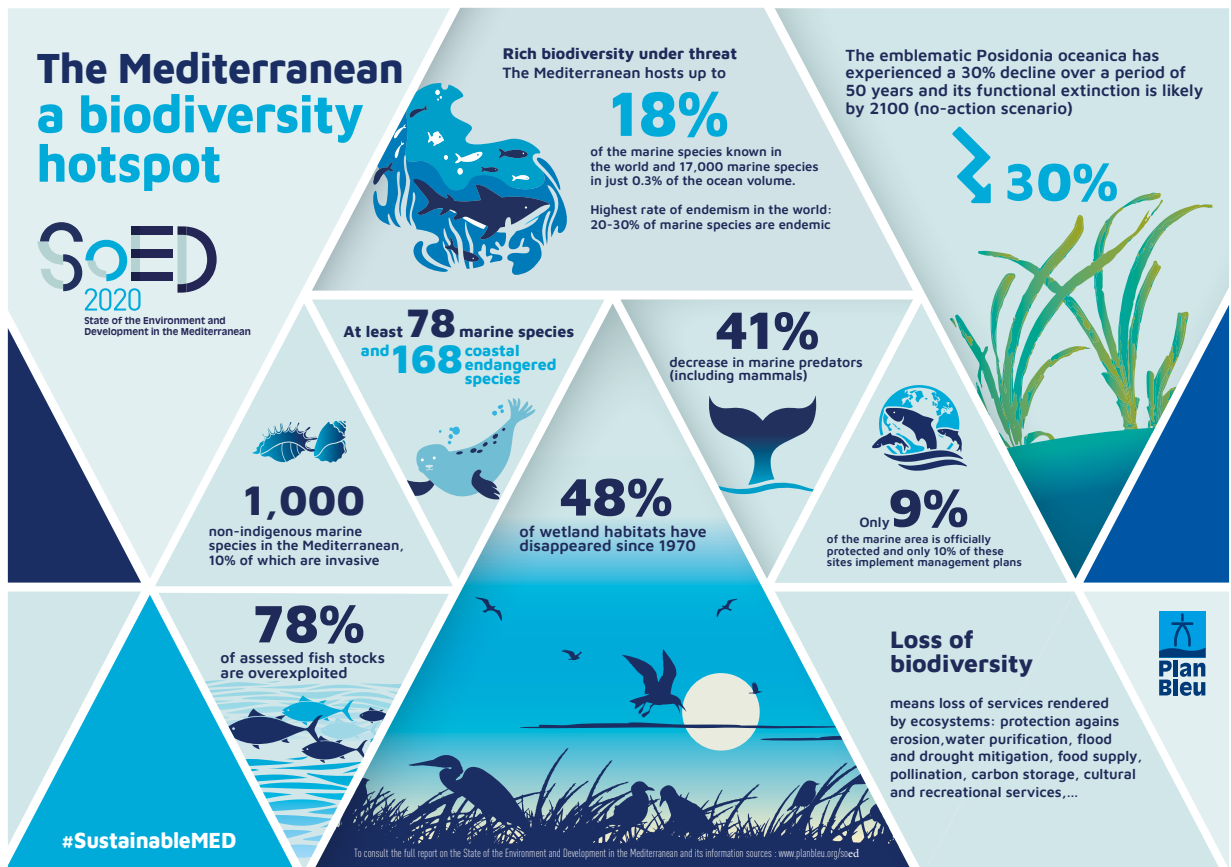


Figure 12. The Mediterranean, a biodiversity hotspot

Tourism has a key role to play in the Mediterranean and a holistic approach to this sector that considers its impacts and its high dependence on natural resources by implementing adaptive measures is crucial and could turn tourism into a win-win sector, both for people and the environment.

Some emerging initiatives revolve around the **restoration of coastal systems** by establishing collaborations between the tourism sector, conservation and research centres, as well as between governments, private donors and international grant schemes. For instance, the Interreg Med POSBEMED⁸⁰ project develops planning strategies that enhance the value of the *Posidonia* beach-dune environment and integrate them into the overall coastal strategy, while also addressing concerns and educating stakeholders in the tourism sector.

Another example is the *WTO 2012 'Destination Flyways: Migratory Birds and Tourism' initiative*. It serves as a strategic mechanism to promote the conservation of land where migratory birds live, while spreading the benefits of tourism to local communities. This is because it includes local actors and tourists in the implementation of bird site management plans and tourism products (UN, 2012).

These activities contribute to **safeguarding ecosystems**, yet they need to overcome numerous barriers. Some of these activities are developing a strong social (tourist) appeal, and breaking silos between sectors such as research and tourism. On another note, coastal tourism can be a vehicle for ocean protection through **tourist fees** as seen in *Formentera's posidonia project* (Balearic Islands, Spain) which was supported by the Sustainable Tourist Tax (McWilliams & Keenan, 2017). However, further exploring the role of behavioural change and tourism education in order to increase environmental protection remains a challenge.

80 <https://posbemed2.interreg-med.eu/>

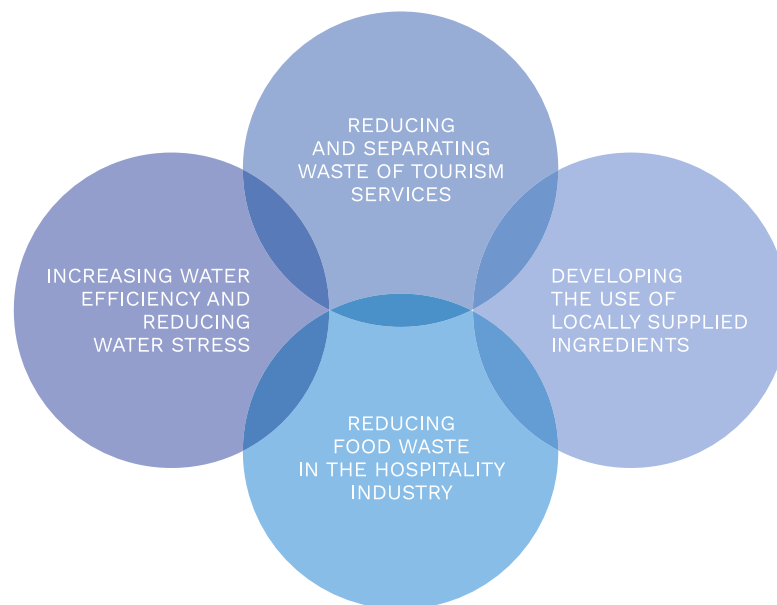
It is crucial to work on coordinated action within the tourism sector and between tourism and other sectors – involving all stakeholders, including government officials, local authorities, tourism professionals and NGOs, based on clear frameworks for action, such as sustainable tourism plans and biodiversity strategies at the local, national and regional level⁸¹.

4.4 | The circularity of tourism

According to the Ellen MacArthur Foundation, a circular economy is: «an economy that produces no waste or pollution by design or intent, and in which material flows are of two types, biological nutrients, designed to safely re-enter the biosphere, and technical nutrients, which are designed to flow at a high level of quality through the production system without entering the biosphere, while being restorative and regenerative by design».

The tourism sector, following a linear economic model, without paying attention to the entire value chain, is contributing to many negative externalities through energy demand, waste generation, water consumption and wastewater discharge, as well as increasing greenhouse gas emissions.

The tourism industry needs to embed sustainable practices in its business models and the entire tourism value chain. Shifting from linear to circular business models through a circular strategy seeks to keep products, components and materials at the highest value and utility, at all times. “It entails gradually decoupling economic activity from the consumption of finite resources, and designing waste out of the system” (Ellen MacArthur Foundation, 2022, n.p). According to the EC (2022b), circular strategies for tourism services include four pillars (Figure 13).



Source: Eco-union based on EC, 2022b

Figure 13. Pillars of the circularity in tourism services

Most countries in the Mediterranean region suffer the impacts of unsustainable/inappropriate practices and intensified/large-scale activities in the tourism sector leading to a series of undesirable side effects. More than 730 tonnes of plastic enter the Mediterranean Sea every day in which single-use plastics represent more than 60% of the total recorded marine litter on Mediterranean beaches, which is typically generated from beach recreational activities (Plan Bleu, 2020).

81 <https://mio-ecsde.org/wp-content/uploads/2015/02/En-Tourism-and-Biodiversity-in-the-Mediterranean-Opportunities-and-Threats.pdf>

A common vision to address the root causes of major externalities such as water, waste and energy management as well as plastic pollution is crucial in fostering the circularity of the sector.

The Interreg MED **INCIRCLE** project⁸², which has been identified in the Case Studies annex, tests new methodologies that apply the principles of circular economy to the tourism sector, with a focus on the needs of islands and low density areas. Promoting efficient use of water, energy production from local renewable energy sources, waste reduction, sustainable mobility are the challenges territories need to deal with to match tourism benefits with territorial sustainability, ultimately improving tourist destination competitiveness.

One particular example is plastic waste generation. Tourism businesses and destinations have made great strides in reducing their environmental impact and operating in harmony with nature. However, the problem of plastic pollution in tourism needs international commitments and cooperation. To tackle the scale of the problem, changes need to take place throughout the tourism value chain. The **Global Plastic Initiative** mentioned before, brings together businesses, governments and other tourism stakeholders to stop plastic ending up as pollution, and reduce the amount of new plastic that is produced in the first place⁸³.

4.5 | Social inequality and pandemic recovery

Over the last two years, the tourism industry in the Mediterranean has witnessed unprecedented socio-economic changes at many levels. However, there are some challenges that go back to former times (from almost when the tourism industry emerged, in the mid-twentieth century). These range from **gender imbalance**, to **youth** and **southern Mediterranean exclusion**, and **labour insecurity**, mainly due to the high **seasonality of contracts** (Fletcher, 2019). Ensuring not only basic rights, but also providing the specific needs of each actor is crucial to putting an end to inequality in tourism. With the recent global health crises, these aspects have been exacerbated, now becoming a dual concern.

The **lockdown period** in 2020 was the first worldwide transportation closure. As travel is a condition for tourism, it triggered severe clientele losses for all tourism industries and caused brand damage to tourism destinations. Also, the lockdown period led to high **unemployment** levels and the closure of many tourism-related businesses (WTTC, 2021a).

The **opening period without vaccines** in 2020-2021 resulted in severe losses for companies relying on business models that depended on high volume of sales. Moreover, the (un-harmonized) regulations required additional investments from companies to comply with health measures, precisely when financial situations were fragile and at their lowest. Lastly, the scarcity and lack of clarity concerning loan opportunities set a barrier for tourism actors (OECD, 2020b). This scenario has ultimately led to high **labour market insecurity**, which has also produced **seasonal workforce shortages**. Moreover, the **financial burdens** produced by COVID-19 restrictions hinder the financial sustainability of many **Small and Medium Enterprises** (SMEs) and favour business concentration, monopolization and financialization (OECD, 2020c).

Currently, **changes in demand**⁸⁴ as well as the shift towards remote working, have reduced the number of **business trips and face-to-face events**.

⁸² <https://incircle.interreg-med.eu/>

⁸³ <https://ellenmacarthurfoundation.org/the-global-tourism-plastics-initiative>

⁸⁴ Demand changes regarding travel patterns, destination preferences, type of accommodation, type of activities to develop etc.



5

NEW VISION FOR SUSTAINABLE TOURISM IN THE MEDITERRANEAN

The aim of this chapter is to present the **post-pandemic highlights** of the tourism industry through the lens of sustainable development in the Mediterranean. This ‘new vision’ considers the literature review presented above, as well as the input from the survey and the **Sustainable Tourism Community (STC)** consultation (Annex II). Furthermore, it highlights that **cooperation mechanisms remain weak**. Thus, the following messages should ideally be adopted by those with the policy and regulatory mandate to make tourism a more sustainable industry.

5.1 | Synergies between institutions, policies and strategies

In the Mediterranean region, tourism is part of a broader **urban and cultural regional ecosystem**, and tourism **destinations** are designed as quality **places to live and visit**. Therefore, tourism destinations have much to gain from promoting synergies between existing institutional frameworks, a just and inclusive post-pandemic transition and mass tourism degrowth models for the sake of their long-term sustainability.

Bolstering institutional synergies (or synergies of regimes⁸⁵) creates political coherence among agendas (e.g. tourism and climate change), aligns collective ambitions (e.g. creating alternative tourism models that are climate neutral) and promotes inclusion of local actors to accelerate in-field action (Figure 14).

Sectoral synergies are lacking between the **Barcelona Convention (BC)** and the **Convention on Biological Diversity (CBD)**. They are also rather old conventions from 1976 and 1992 respectively, which often overlook contemporary realities and needs. Consequently, the **UNWTO** and **UNEP** have an important role to play in updating them, improving coordination between the tourism and environmental sectors, and further aligning their agendas. Another example is strengthening the ties between the **EU Transition Pathway for Tourism** and the **Glasgow Declaration on Tourism** in order to adapt global and European goals to territorial realities.

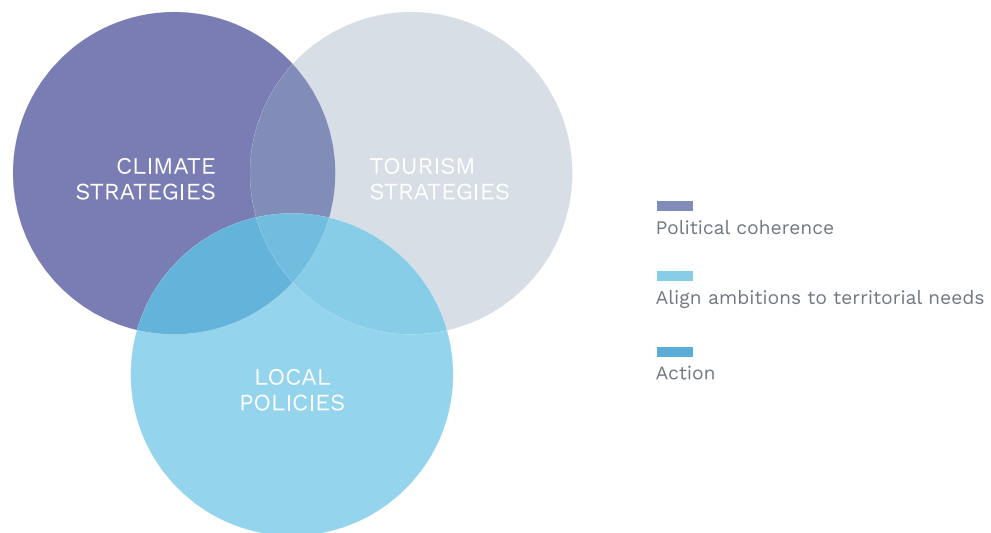


Figure 14. Institutional synergies in tourism policies

Source: Eco-union

5.2 | An inclusive, systemic and fair transition

A **just and inclusive transformation** of tourism must prioritise the voices and needs of **underrepresented** (such as youth, the elderly or women) **and vulnerable groups**. Besides greater inclusion, it is crucial to address **labour conditions** and revenue distribution of tourism-related businesses. Also, eliminating **subsidies for fossil fuels** is fundamental, promoting renewable energy and prioritising less carbon consuming transport. Drawing on these premises, it makes sense to **enhance the clarity of collaboration agreements and goals** among the scientific community, decision-makers, and tourism stakeholders.

⁸⁵ An international regime is as a set "of implicit and explicit principles, norms, rules, and decision-making procedures around which actor expectations converge in a given area of international relations" (Krasner 1982, p. 186)

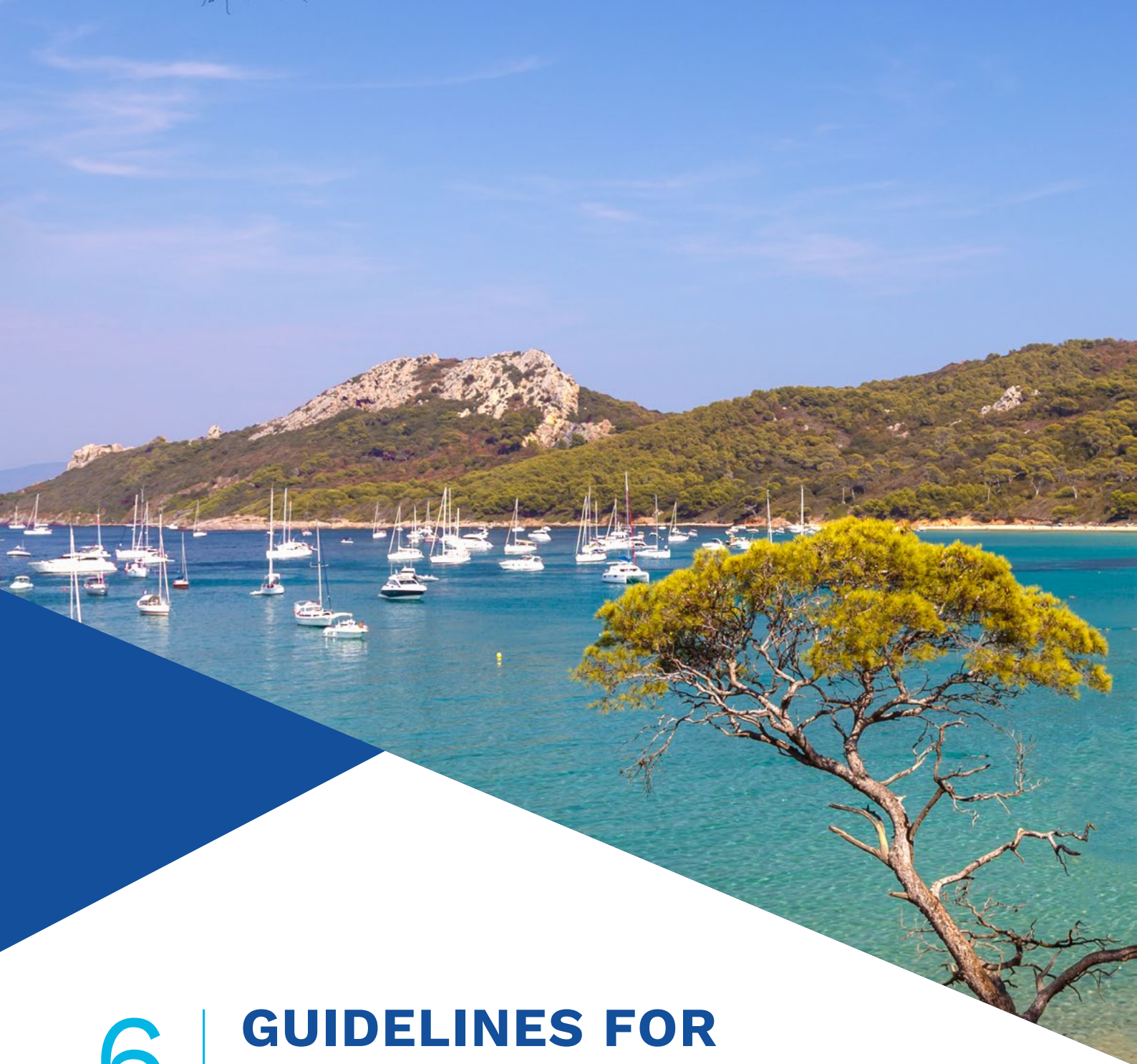
Furthermore, in the face of unequal social, economic and political contexts between northern and southern Mediterranean countries, it is essential to foster partnerships to **transfer knowledge and help southern countries advance** towards decarbonisation and climate adaptation pathways in tourism. Moreover, it is important to acknowledge the uneven historical evolution of the tourism sector on both sides of the Mediterranean -as well as **intergenerational justice** aspects- to drive a just and inclusive transformation and balanced recovery of the industry.

5.3 | Alternative and regenerative tourism models

Sustainable tourism requires **alternative (less impacting) models** to comply with **Multilateral Environmental Agreements** (MEAs) such as the Paris Agreement, Barcelona Convention or CBD. It is central to **facilitating cross-sector agreement** on a shared vision for the sustainable future of tourism, which focuses on mass tourism degrowth strategies. For this, Mediterranean governments should **diversify** their coastal economies, in the hopes of reducing their dependence on tourism to achieve prosperous territories in the long run. In summary, alternative strategies for mass tourism, such as year-round tourism, are essential to ensure that the tourism industry complies with the targets of MEAs, i.e., ecological functionality is maintained.

5.4 | Future-proof and resilient tourism

All in all, the new **vision for sustainable tourism** in the Mediterranean is built upon inter-sectoral coordination, inclusive participation of stakeholders, North-South cooperation for development, and holistic cross-sectoral directives. As it is becoming increasingly accepted that the **climate emergency** is a threat to the tourism sector and there is no time left to turn a blind eye to environmental requirements (as shown by the STC survey's (Annex II), these different strategies are expected to provide **long-term and sustainable benefits** to the tourism and environmental sectors, as well as the Mediterranean economy and society as a whole.



6

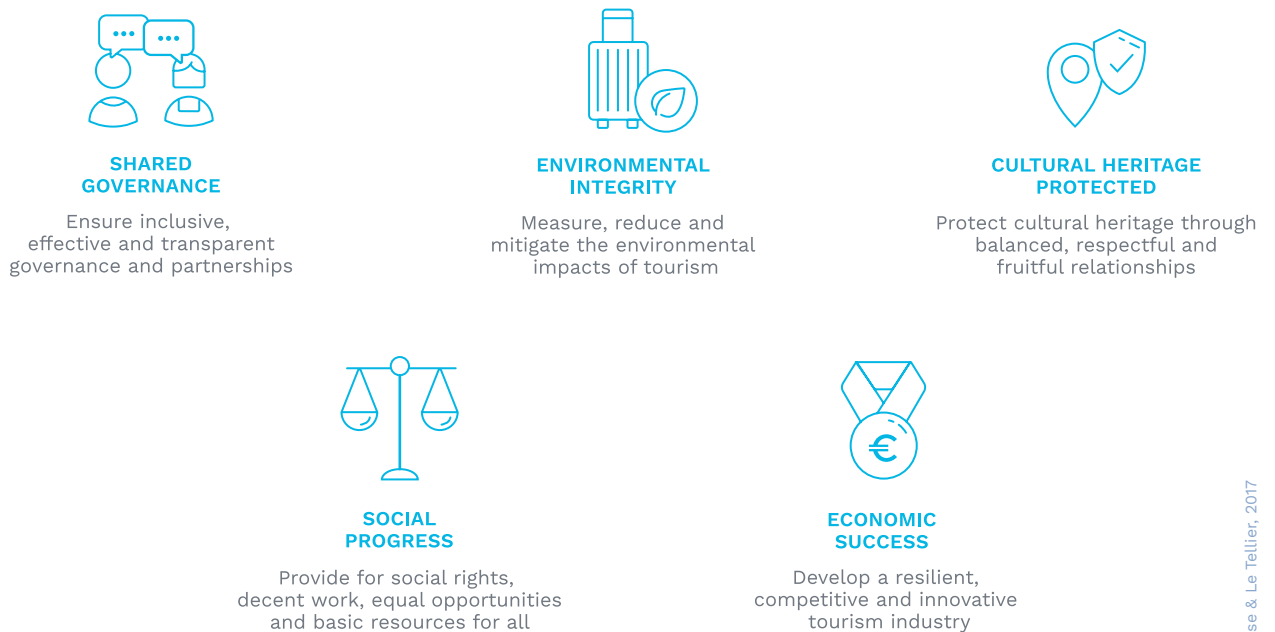
GUIDELINES FOR SUSTAINABLE MEDITERRANEAN TOURISM

This chapter presents objectives and guidelines to support decision-makers, national tourism organisations, local communities and destination management organisations to develop smart, green and safe Mediterranean tourism after the COVID-19 crisis, building on the [*Sustainable Tourism in the Mediterranean: State of Play and Strategic Directions*](#) document, released in 2017.

The overarching **objectives for sustainable tourism** in the Mediterranean proposed by Fosse and Le Tellier (2017) have not yet been achieved, although they are still keystones for achieving sustainable tourism in the Mediterranean. It is important to continue pursuing the five strategic objectives:

01. Environmental integrity,
02. Social equity,
03. Economic prosperity,
04. Cultural heritage
05. Shared governance.

These **objectives** bridge the gaps between the challenges (Chapter 4) and the vision (Chapter 5).

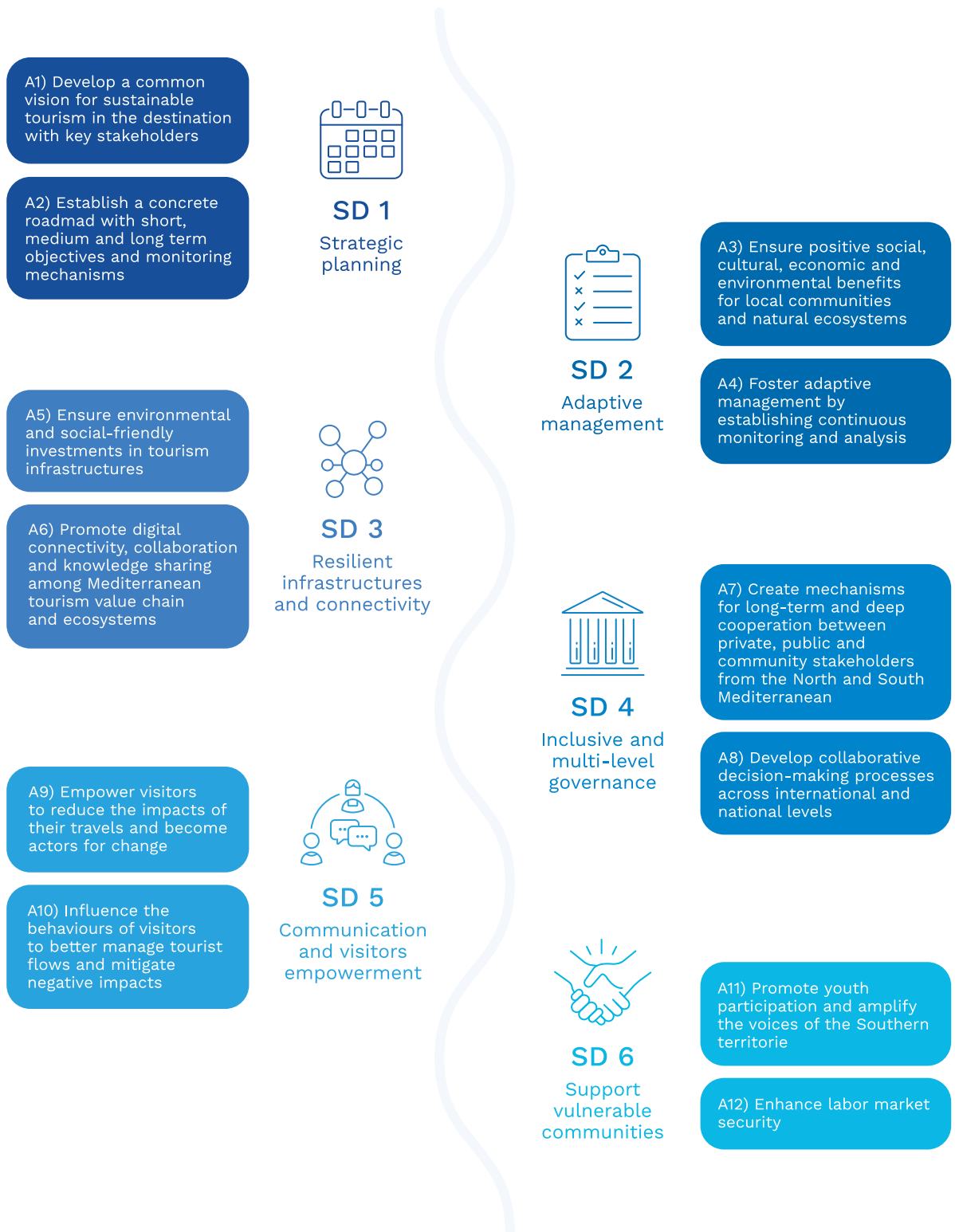


Source: Fosse & Le Tellier, 2017

Figure 15. Objectives of sustainable Mediterranean tourism

6.1 | Roadmap, Strategy and Actions

To give further detail on how to address modern issues in line with the new vision, this report has identified six **Strategic Directions** (SD) and twelve **Actions** (A) to complete the process (see Figure 16). It has done so by synthesising the information compiled during the research process, and by including the recommendations outlined by the **Sustainable Tourism Community** (STC) survey (Annex II). Lastly, it contains some of the recommendations from the **Sustainable Tourism Handbook** to assist destinations, businesses and visitors in adopting sustainable tourism practices in a post pandemic and climate emergency context (ETC, 2021).



**SUSTAINABLE COASTAL TOURISM
AND ECOTOURISM IN THE MEDITERRANEAN**

Figure 16. Roadmap for Sustainable Mediterranean Tourism

Source: Plan Bleu

6.1.2 | Strategic Directions and Actions

Strategic Directions

→ Actions

SD 1 — Tourism planning and monitoring

To guide the transition to sustainable tourism, it is essential to design, develop and implement an ambitious roadmap that defines concrete objectives, milestones, targets and indicators. Strategic and collaborative planning at destination level is a critical step to aligning all stakeholders' interests, capacities and benefits.

A1 — Develop a common vision for Sustainable Tourism

Establishing a shared vision with tourism stakeholders is an important step to guarantee that the planning process is science-based, target-oriented, comprehensive and inclusive. That way, destination development can be managed without compromising local quality of life, cultural heritage and natural resources. In other words, the shared vision is necessary to achieve coherent, fair and sustainable resident and visitor balance.

A2 — Establish a concrete roadmap towards sustainable tourism

The roadmap should include alternative measures of success to visitor numbers or the revenue generated, with short, medium and long-term objectives and monitoring mechanisms. Relevant metrics could include: value created for local economies and communities, resident satisfaction, quality of life and well-being, environmental stewardship, protection of natural and cultural assets, or the equitable distribution of income.

SD 2 — Adaptive and inclusive management

Following the vision defined previously, the implementation of the strategy should be based on adaptive and inclusive management mechanisms and tools, based on evidence, transparency and accountability. All stakeholders must be involved to ensure shared and sustainable benefits for local communities, the tourism industry and natural ecosystems.

A3 — Ensure benefits for local communities and the environment

The management plans should include positive social, cultural, economic and environmental benefits for local communities and natural ecosystems. They could use the following instruments and tools: i) create year-round visitor products and services; ii) use technology to manage tourist flows; iii) disperse visitors away from pressured sites; and iv) encourage low-impact tourism models, such as trips that use local and or low-carbon transport, or such as accommodation providers that use resources

Strategic Directions

→ Actions

SD 3 — Resilient infrastructure and connectivity

The infrastructure (hotels, airports, resorts, ports, etc.) developed by or for tourism activities are critical assets with large environmental impacts and high vulnerability to climate events. Greening, retrofitting or repurposing existing infrastructure are essential actions for reducing the tourism climate footprint and improving environmental ecosystems. Connectivity (digital, ecological, social, etc.) also contributes to resilience and future-proof industry and communities.

responsibly (e.g., avoid single use plastic, generate or procure renewable energy).

A4 — Foster proactive management through monitoring

Current and future (economic, social, cultural or environmental) impacts in coastal regions should be continuously monitored and analysed. In addition, open sharing data platforms may be developed to improve decision support tools and mechanisms. Tourism stakeholders and travellers could be involved in the collection and processing of data to improve monitoring.

A5 — Ensure environmental and social investments

New investments in the tourism sector should include the implementation of Nature-based solutions (NbS) and eco-designed infrastructure, to promote the renaturalisation of coastal areas instead of their urbanisation (i.e., dunes instead of buildings along coasts). Revenue from tourism (tax, etc.) could contribute to the conservation, protection and celebration of cultural and natural assets. It increases destinations' attractiveness and mitigates the negative impacts of tourism. Self-sufficient buildings in terms of energy or water consumption and production are indispensable for creating future-proof investments in tourism infrastructure.

A6 — Promote digital, cultural and social connectivity

Digital, cultural and social connectivity across the Mediterranean tourism value chain and ecosystems is needed to ensure resilient, balanced and competitive tourism. It should be approached by educating and working with tourism and non-tourism bodies, such as those responsible for providing infrastructure and resources (e.g. transport, water, energy, IT, education and waste management). These resources would be primarily exploited by or with local stakeholders, who should be included in all planning and management decisions to ensure shared benefits and inclusive governance.

Strategic Directions

→ Actions

SD 4 — Inclusive and multi-level governance

Good governance in the tourism sector is essential to ensure effective, inclusive and balanced decision and policy-making processes. It leads to actions, policies and strategies that contribute to shared benefits in the whole tourism eco-system and value chain. Multi-stakeholder collaboration and public-private partnerships are some of the tools to be promoted at the destination, sectoral or country level.

A7 — Create mechanisms for long-term and inclusive cooperation

Coordination and collaboration between private, public and community stakeholders from the northern and southern Mediterranean should include the key actors at the local, regional or national levels:

- a) Industry professionals and private operators, to address socio-environmental challenges and develop collaborative solutions, build trust and productive relationships for the future.
- b) Local communities, to ensure an inclusive governance process in which they are actively and fully engaged in decisions around tourism in their area and in its planning, management and delivery.
- c) Financial investors who will buy-into the vision for the destination and support sustainable tourism practices.
- d) Intra-regional and international partners who share knowledge and build alliances to collaborate in regional and cross-border sustainable tourism initiatives.
- e) Regional and local authorities which can educate the tourism sector and develop policies and tools to promote the smarter use of resources and manage tourism flows and impacts.
- f) National policymakers to ensure tourism's interconnectedness with other sectors (mobility, housing, environment, etc.), improve the political and fiscal environment and support sustainable tourism infrastructure, skills development and business incentives.
- g) Academia, research centres or think-tanks to identify current or future challenges and develop solutions, training and capacity-building programmes.

A8 — Develop collaborative and science-based decision-making

Establishing effective collaboration requires trust amongst actors, which is in turn achieved by evidence based on science. Therefore, setting up facts-based strategic decision-ma

Strategic Directions

→ Actions

	<p>king at national and local levels is fundamental. For instance, identifying the water and carbon footprints associated with tourism is important for making cross-sectoral decisions accordingly and implementing strategies to reduce them (and therefore mitigate climate change effects).</p>
<p>SD 5 — Capacity-building, awareness and empowerment</p> <p>The commitment and involvement of the whole tourism sector as well as visitors and local communities is essential for ensuring a fair and inclusive transition towards sustainable tourism.</p>	<p>A9 — Empower visitors to become actors for change</p> <p>Explaining to tourists how they can change their travel habits is important, as well as offering them opportunities to get involved in caring for the destination through local initiatives, such as no-plastic pledges, responsible volunteering and beach clean-ups.</p> <p>A10 — Influence the behaviours of visitors</p> <p>Demand-side management tools allow management of tourist flows in order to address seasonality and spread the benefits of tourism more equally. It consists in encouraging visitors to travel in the off-peak season and to visit areas that are not under pressure from tourism, by using marketing or behavioural instruments like nudges⁸⁶.</p>
<p>SD 6 — Support vulnerable communities and groups</p> <p>A successful transition towards sustainable tourism should not leave behind any vulnerable stakeholders. Proactive policies and actions are necessary to identify, capacitate and engage with vulnerable groups, often excluded from the regular policy and decision-making processes.</p>	<p>A11 — Ensure participation of local youth and women</p> <p>The role played by young locals and women is crucial and often undermined. Therefore, actions to engage further with marginalised or vulnerable stakeholders are needed. Particularly, they should be included in tourism decision-making processes, as they will inherit the consequences of current choices. On the other hand, the needs of tourism actors from the southern Mediterranean should be as prioritized as much as those of the northern actors.</p>

⁸⁶ Nudge, can be expressed as “pushing someone gently with the elbow”, and it aims to intervene in the choice architecture of individuals (namely the environment in which the decision is taken) by relying on cognitive bias likely to be produced during the decision-making process (Dianoux et al., 2019)

Strategic Directions

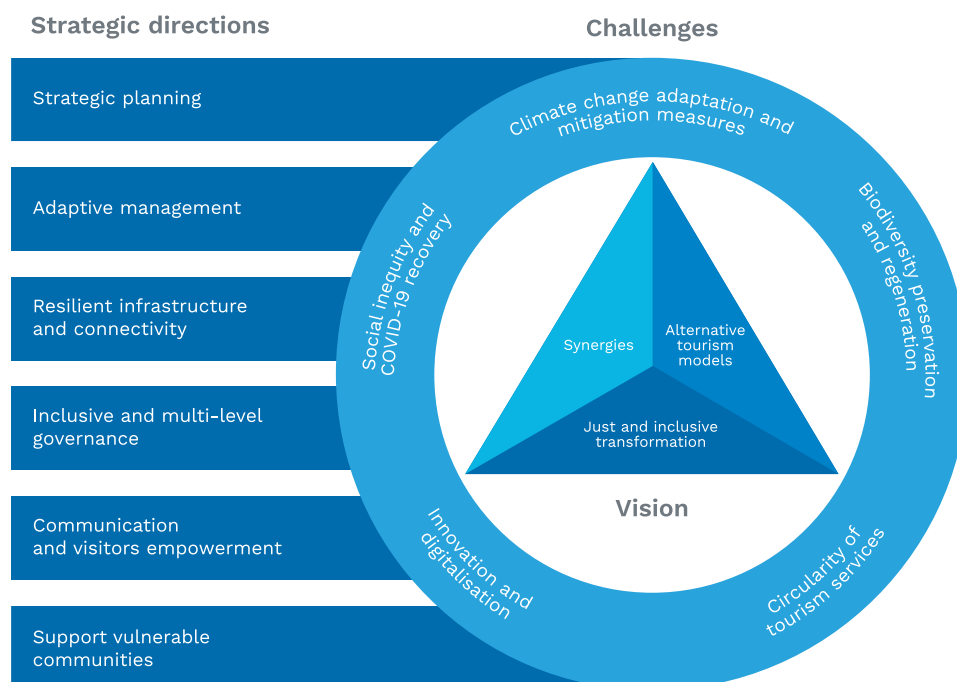
→ Actions

A12 — Enhance labour market security

Tourism is a very fragmented industry that integrates both large multinationals and small local businesses. Public authorities should support SMEs in fragile situations (e.g., islands and areas with scarce resources) and monitor large companies on their socio-economic practices. Improving labour conditions includes transitioning from seasonal to stable contracts in order to avoid workforce shortages and support local economies and entrepreneurs. Lastly, ensuring a gender-balance and fair revenue distribution of tourism-related businesses is important to achieve financial and social sustainability in Mediterranean tourism.

6.2 | Integration of challenges, vision and strategic directions

In conclusion, this report has focused on **six strategic directions**: (1) Strategic planning, (2) Adaptive management, (3) Resilient infrastructure and connectivity, (4) Inclusive and multi-level governance, (5) Communication and visitor empowerment, and (6) Support of vulnerable communities, which are all tangential areas that bridge the gap between tourism’s complexity and ideal situation. This bridge is crucial to overcoming the challenges identified and implementing the vision. Figure 17 presents the next outlines of these inter-connections and closes this chapter.




Source: Plan Bleu

Figure 17. Integration of challenges, vision and strategic directions towards sustainable tourism



7 | CONCLUSION

This report highlights that tourism in the Mediterranean is a keystone for the development of the region. It also calls for an **active transition process** towards more environmentally friendly and socially responsible business models. Moreover, it offers updated insights on coastal tourism in the Mediterranean, thus contributing to the body of literature on the region in a post-pandemic period, which in turn is fundamental for driving forward the regional agenda on sustainable tourism in the near future.



The analysis shows that the Mediterranean countries have suffered the harshest **impacts of COVID-19** in 2019–2020, based on decreases in GDP and in employment rates. Secondly, **ITAs in the Mediterranean** have decreased exponentially from 400 million inbound arrivals in 2019 to over 88 million ITAs in 2020. Thirdly, **new tourism** patterns have shifted towards combining work and vacations, nearby/local clients, longer stays at few destinations and, innovations in the use of **digital tools** to engage with visitors while raising environmental awareness within the tourism and travel experience.

In terms of **socio-economic issues**, the report recommends focusing efforts on the inclusion and representation of **vulnerable groups** to achieve a just and inclusive transition. It also suggests addressing **labour conditions** and **revenue distribution** of tourism-related businesses. However, coastal tourism risks creating further gaps between SMEs and large companies, between northern and southern territories and between intergenerational and gender differences.

When it comes to **environmental challenges**, the report suggests the development of alternative models to mass tourism, avoiding concentration in time and space, phasing out the use of fossil energy and promoting longer stays and nearer destinations. Resource efficiency and circularity are also essential to the green tourism industry and services.

As regards **institutional frameworks**, which pave the way towards sound governance, there is a need to increase **political consistency** between policies, initiatives and institutions. In particular, coordination between the tourism and environmental sectors through key stakeholders needs to be improved. Stronger connectivity between local tourism agendas, the EU Transition Pathway for Tourism and international initiatives, to adjust global and European goals to local realities is also essential. Another aspect to be taken into account is the need to enhance the clarity of **collaboration agreements and goals** which are set out in frameworks among tourism stakeholders from different disciplines (scientific community, decision-makers, civil society organisations and tourism industry).

The report has shown that complying with the requirements on i) climate change mitigation and adaptation, ii) preservation and regeneration of biodiversity iii) circular economy principles and iv) innovation and digitalisation in a post-COVID-19 period is a real challenge for the tourism sector. Therefore, apart from implementing holistic approaches to address such requirements, transitioning to alternative and less impacting tourism models now, is essential, as it is becoming increasingly clear that without alternative strategies for tourism, there are no hopes for upgrading the ecological functionality of the Mediterranean in 2030.

All in all, the **new vision for sustainable tourism** in the Mediterranean is built upon inter-sectoral coordination, inclusive participation of stakeholders, North-South cooperation for development, and holistic cross-sectoral policies. It is clear that addressing the climate emergency is ultimately a common challenge and a shared responsibility which requires the support and commitment of tourism actors and society as a whole.



ANNEXES

ANNEX I — Case Studies

ANNEX II — Survey

ANNEX I

Case Studies

This chapter reviews ten Case Studies (CS) to analyse good practices and tools that respond to specific problems threatening the sustainability of tourism in the Mediterranean. The aim is to inspire decision-makers to implement successful practices and handle current problems more effectively. The cases have been selected by building on desk research and considering the answers to the survey shared with key Mediterranean stakeholders.

Given that the scope of the **case studies** is the entire Mediterranean, the case studies were carefully selected in order to provide an equal and representative sample. As such, the first 5 cases have been taken from the **northern Mediterranean**, and are funded by the EU regional **Interreg MED** programme, while the last five are located in the **southern Mediterranean**, and are funded by **ENI CBC Med** programmes. However, all cases demonstrate potential initiatives for addressing very common sustainable tourism issues in the Mediterranean region, as outlined in Table 3.

Case Study	Issue
DestiMED Plus	Governance in ecotourism destinations
INCIRCLE	Resources efficiency and circularity
MedCycleTour	Low-carbon and slow tourism
BEST MED	Seasonality and governance
CONSUME-LESS	Energy and water overconsumption and waste generation
Co-Evolve 4GB	Maritime planning and pressure on natural ecosystems
MEDUSA	Territorial imbalances and mass seaside tourism
SwitchMed II	Unsustainable use of resources (plastics, textiles, food)
Med Pearls	Mass tourism and seasonality
CROSSDEV	Development opportunities in depressed rural areas

Table 3. Selected projects and issue/s addressed

The selected case studies focus on the impact of tourism practices in the field and pay attention to the inclusion of local communities and key stakeholders in the tourism development process. The preliminary requirements for choosing the case studies were:

- i) **Diversity of stakeholders,**
- ii) **Degree of implementation,**
- iii) **Data availability,**
- iv) **Geographic scope.**

The specific criteria for selecting the cases are presented and defined below (Table 4).

Criteria	Definition
Recognition	The project is awarded and supported by recognized institutions
Robustness	The project is built on previous successful initiatives
Local commitment	The project counts with the engagements of local community actors, who play an active role in it
Capacity building	The projects strengthens the skills of local actors and stakeholders
Opportunity	The project counts with external and internal favourable conditions for being scaled-up (market trends, and interests in replicating the case)
Horizontal and vertical coordination	The project promotes collaboration across local and institutional levels

Table 4. Description of the case study selection criteria

7.1 | DestiMED Plus

Acronym	<i>DestiMED Plus</i>
Full name	Ecotourism in Mediterranean Destinations: From Monitoring and Planning to Promotion and Policy Support
Scope	13 protected areas: Samaria (Greece); Lastovo Islands (Croatia); Torre del Cerrano (Italy); S'Albufera des Grau, Menorca (Spain); Kornati (Croatia), Ebro Delta (Spain), Colline Metallifere (Italy); Camargue, Calanques (France); Riviera di Ulisse, Circeo (Italy); Shkodra, Vloara Region (Albania)
Pilot site	Divjakë-Karavasta National Park, Albania
Geographical attributes	Protected areas
Thematic scope	Promotion of ecotourism through regional and participatory governance
Problem addressed	Governance, quality and sustainability of ecotourism destinations. DestiMED Plus has improved policy coordination between tourism and conservation departments in each project partner region, through the joint creation and promotion of ecotourism itineraries in Mediterranean protected areas
Coordinator	Regione Lazio - Regional Parks Agency of Lazio (Italy)
Partners	<ul style="list-style-type: none"> • Academia: Fundació Universitària Balmes (Catalonia, Spain) • Civil society organisations: WWF Mediterranean (Italy), Conference of Peripheral Maritime Regions of Europe (France) • Administration and public sector: Government of Catalonia (Spain); Government of Andalusia (Spain); Institute for Tourism (Croatia), Autonomous Region of Sardinia (Italy), IUCN Mediterranean Centre for Cooperation (Spain), Region of Crete (Greece), National Agency of Protected Areas (Albania), Development Agency of South Aegean Region Energeiaka S.A. (Greece), Corsican Tourist Agency (France)
Timeframe	Nov. 2019 – Jun. 2022
Total Budget	€3,247,000
Website	www.destimed-plus.interreg-med.eu/



Methodology and policy approach

DestiMED PLUS promotes integrated planning - Integrated Coastal Zone Management (ICZM) - in coastal tourism. It links tourism with conservation by jointly developing sustainable ecotourism itineraries in Mediterranean Protected Areas (PAs). It improves the quality of the ecotourism products, by measuring and monitoring the impacts on protected areas in order to foster local ecotourism. An ecotourism training platform has provided local operators with content to develop, monitor and promote ecotourism in Protected Areas. Regional Ecotourism Coordination tables (RECs) have been used to test the pilot actions. The results have been incorporated into a policy road map for each region, and integrated into a single Mediterranean policy document.



Assessment

Recognition

The DestiMED PLUS project is one of the finalists in the European Natura 2000 awards, which reward excellence in the management of protected areas and highlight the added value of nature conservation for local communities and economies (UVic, 2022).

Robustness

It includes collaboration between numerous institutions (from academia, civil society, businesses, investors and governments) to improve the quality of life for local people in destinations, while the natural and cultural assets are protected.

Local commitment

In the Divjakë-Karavasta National Park, the involvement of the local community has increased the authenticity of tourism by promoting its cultural and social value, as well as ensuring the social return into the local economy.



Results

- By encouraging **participation** from local providers, it has created a more resilient tourism industry, enabling public agencies to engage with the local community and integrate local concerns.
- It has also improved **the quality of its eco-tourist products**, balancing between culture, adventure and nature issues.
- It has contributed to **clusters of local tourism operators** (MEET model) that work collaboratively to design sustainable and conservation tourism activities in the Mediterranean MPAs.
- It has also established a **Mediterranean Ecotourism Consortium** (MEC) to advocate for integrated ecotourism policies, incorporating conservation, sustainability, and economic perspectives in tourism planning processes.
- It has developed **online tools for** measuring and improving the sustainability of ecotourism products and for building capacity among local ecotourism stakeholders.
- A **monitoring platform** has been created to enhance the Ecological Footprint calculator, incorporating socio-economic, governance and conservation indicators.
- A **training platform** provides content to develop, monitor and promote ecotourism and sustainable coastal tourism development.

Conclusion

DestiMED PLUS has successfully promoted ecotourism in targeted regions, supporting synergic alliances between local actors and increasing resilience and cohesion among policies. The project has increased recognition of sustainable models of tourism and has raised awareness on travel and experience tourism. In terms of replicability, DestiMED PLUS can be extended to other Mediterranean Protected Areas to improve the eco-tourism governance and structure.

7.2 | INCIRCLE

Acronym	<i>INCIRCLE</i>
Full name	InCircle Enhancing Sustainable Tourism in insular and low density areas
Scope	Italy, Spain, Greece, Cyprus, Albania and Malta
Pilot site	Rethymno, Greece
Geographical attributes	Islands and small towns
Thematic scope	Circular Economy
Problem addressed	Resource inefficiencies, environmental pollution and overconsumption
Coordinator	Area Science Park (Italy)
Partners	<ul style="list-style-type: none"> • Academia: Institute Scuola Superiore Sant'Anna, AREA Science Park (Italy) • Civil society organisations: MEDCITIES (Spain), CIVINET CY-EL (Greece) • Administration and public sector: Albanian Institute of Transport, Region of Crete (Greece), Himara Municipality, Palma City Council, Regional Government of the Balearic Islands (Spain), Municipality of Rethymno (Greece), Ministry of Gozo (Malta), Energy and Water Agency (Malta), Larnaca-Famagusta District Development Agency (Cyprus)
Timeframe	Nov. 2019 – Jun. 2022
Total Budget	€3,378,770
Website	www.incircle.interreg-med.eu/



Methodology and policy approach

INCIRCLE tested a new methodology that applied the principles of circular economy to the tourism sector, with a focus on the needs of islands and low density areas. It tailored policies to address mobility, energy efficiency, use of limited resources such as water and waste production, while enhancing community prosperity and quality of life. It applies circular economy principles in the tourism sector while building capacities among local communities and key stakeholders.



Assessment

Robustness

The INCIRCLE project has been awarded the 1st "Greek Green Award for Sustainable Tourism". The European initiative, '*Nearly Zero Energy Hotels*', was implemented as a best practice case in Rethymno (Greece). Other regions such as Ragusa (Italy) have shown interest in replicating similar approaches.

Local commitment

The project counts on the active commitment of public authorities, sectoral agencies, infrastructure and public service managers, interest groups including NGOs, research centres, SMEs and business support organisations.

Capacity building

INCIRCLE offers digital skills and sustainability literacy traineeships for insular and low population areas in the Mediterranean.



Results

- Energy saving and reduction of operational costs, waste and water management, and sustainable mobility.
- The online tool '*INCIRCLE Knowledge Platform*' developed:
 - i) Collection and sharing of tools, methods and best practices.
 - ii) Promotion and sharing of "circularity" indicators.
 - iii) Benchmarking policies and practices on circular tourism and self-assessment tools.
 - iv) Online repository for the collection of solutions and outputs.

Conclusion

INCIRCLE has produced long-lasting and easily adaptable outputs to provide MED decision-makers with concrete tools and testing opportunities to improve their capacity in terms of assessing and planning sustainability in places where resources are already scarce, to identify new funding and concrete replication opportunities, establishing a critical mass for Mediterranean sustainable and circular growth.

7.3 | MedCycleTour

Acronym	<i>MedCycleTour</i>
Full name	MEDiteranean CYcle route for sustainable coastal TOURism
Scope	Spain, France, Italy, Slovenia, Croatia, Greece, Cyprus and Belgium
Pilot site	EuroVelo 8 is the long-distance cycle route that connects the whole Mediterranean from Cyprus to Cádiz (Spain)
Geographical attributes	Coastal areas
Thematic scope	Cycling-tourism. Promotion of alternative touristic models
Problem addressed	Alternative tourism and low-carbon mobility, seasonality, redistribution
Coordinator	Andalusian Government (Spain)
Partners	<ul style="list-style-type: none"> • SME and business-oriented organisations: Cluster for Eco-social Innovation and Development (Croatia), European Cyclists Federation (Belgium) • Administration and public sector: Alpes Maritimes (France); Catalonia Region (Spain); Western Greece (Greece); Friuli Venezia Giulia Region (Italy); Regional Development Centre of Koper (Slovenia); Croatian National Tourism Board (Croatia), Cyprus Tourism Organization (Cyprus), Consorzio Oltrepo Mantovano (Italy)
Timeframe	Feb. 2017 - Aug. 2020
Total Budget	€2,500,000
Website	https://medcycletour.interreg-med.eu/



Methodology and policy approach

MedCycleTour aims to enhance sustainable and responsible low-carbon and slow tourism through cycling. It has developed a common participation methodology to collectively design cycle routes, through gatherings of local stakeholders. It strengthens Euro-Mediterranean relations by creating regional cycling events, such as the **EuroVelo 13** - Iron Curtain Trail and the **EuroVelo 3** - Pilgrims Route.



Assessment

Recognition

MedCycleTour creates transnational cycle routes among European countries while bringing positive impacts to local tourism, by extending the tourism season, promoting consumption of local products and including local communities in the tourism experience.

Opportunity

Cycling tourism is one of the growing segments of the tourism sector in Europe. Thus, MedCycleTour has a high potential for replicability along European coasts.

Local commitment

The MedCycleTour project uses a participatory approach with local public authorities in the development of cycling infrastructure, tourism policies and promotion of cycling products.



Results

- It has increased the use of routes for cycling along Mediterranean coasts by 25%, by promoting the benefits of cycling in reducing air and noise pollution, greenhouse gas emissions and traffic.
- It has also enhanced information availability about cycle tourism in the Mediterranean area through to the promotion of data-based information.
- It has improved the image of cycling among local communities, youth groups and tour operators.
- It has contributed to strengthening collaboration between national public authorities and local stakeholders to develop EuroVelo cycle tours and other activities.
- It has positioned the Mediterranean region as a cycling tourism destination, by offering quality cycling routes and services.

Conclusion

The MedCycleTour project (particularly, the enlargement of the 'EuroVelo 8' route as well as the design of new cycling routes across the European coast) has promoted sustainable and responsible tourism by providing transnational cycling routes and activities. It also promotes a resilient and healthy mode of transport. In a context in which more European countries are implementing policies to switch to cycling, this project is easy to replicate. Its scaling-up is particularly promising given the indisputable benefits that it offers: cycling offers a cheaper mobility option to tourists, and it is more sustainable and environmentally friendly.

The MEDCYCLETOUR project partners have signed a Charter to gather support for more sustainable and responsible tourism in the MED area. This Charter served as a tool to transfer the knowledge gathered during the project and involve stakeholders across the Mediterranean region in the development of cycling-tourism and the EuroVelo 8 - Mediterranean Route.

7.4 | BEST MED

Acronym	<i>BEST MED</i>
Full name	Beyond European Sustainable Tourism Med Path
Scope	Spain, France, Portugal, Italy, Croatia, Slovenia, Greece and Montenegro
Pilot site	Targeted regions
Geographical attributes	Rural, mountain, coastal, islands, small and big towns, protected areas
Thematic scope	BEST MED contributed to the objective of enhancing Mediterranean Governance, with the main challenges of addressing seasonality and the lack of effective cooperation among key tourism actors
Problem addressed	Its main challenges are to fight against seasonality and the lack of effective cooperation among tourism actors in the Med area, including active citizen participation in designing policies
Coordinator	Andalusian Public Foundation (Spain)
Partners	<ul style="list-style-type: none"> Academia: University of Algarve (Portugal); University of Maribor (Slovenia) Administration and public sector: Lazio Region (Italy), Croatian Chamber of Economy (Croatia); Ministry of Tourism (Greece); Regional Government of Andalusia (Spain); Calabria Region (Italy), National Tourism of Montenegro (Montenegro), Conference of Peripheral Maritime Regions of Europe (France)
Timeframe	Nov. 2019 - Jun. 2022
Total Budget	€2,900,000
Website	https://best-med.interreg-med.eu/



Methodology and policy approach

BEST MED analyses positive and negative impacts of tourism on the quality of life of residents and the tourist experience through the development of **sustainability indicators**. It sets up integrated and sustainable tourism planning to mitigate seasonality in the Mediterranean area. It connects coastal and inland regions with method proposed in the Faro Convention⁸⁷ on Cultural heritage.



Assessment

Robustness

The project is based on qualitative data to test pilot actions, disseminate the results and empower local communities and stakeholders. It is backed by the Mitomed+ project “Green Beach Model” which helps address data collection and management. It also aims to transfer pilot actions to other tourist sites among the eight targeted Mediterranean countries.

Local commitment

BEST MED involves and empowers local communities in the design of policies. It contributes to better Mediterranean governance to mitigate seasonality and obtain effective cooperation between tourism actors.

Coordination

The project aims to create a shared European Cultural Identity, using cultural tourism as a tool to overcome ethnic divisions and discrepancy in cultural heritage value perceptions by communities. Key players at the local and transnational levels are being involved to create synergies across Mediterranean countries.



Results

- Covered **20 projects** addressing ecotourism in the Mediterranean
- **Studied and capitalised on 5 sustainability labels** and certifications
- Developed **26 indicators around** Destination and Sector specific metrics
- **Analysed gaps, needs and challenges** in data collection and management
- Organised an **online workshop** on data management, Policy Learning Seminars and public surveys
- Created a **platform** to showcase emblematic cultural routes: Alpujarras in Andalusia (Spain); Pilgrims trail to Rome (Italy); Iter Vitis – Kvarner Wine Routes (Croatia)
- Established a **Network of Sustainable Tourism Observatories** (NSTO) with data management models, funding opportunities, and best practices

Conclusion

The BEST MED project is a flagship initiative to enhance Mediterranean tourism governance. The new sustainability indicators analyse the sustainability and effectiveness of policies. It has connected the tourism policies of coastal and inland regions to promote and preserve cultural heritage among different European and Mediterranean countries.

⁸⁷ The Framework Convention on the Value of Cultural Heritage for Society (the Faro Convention)¹ was adopted by the Council of Europe's Committee of Ministers in 2005 and entered into force in 2011

7.5 | CONSUME-LESS

Acronym	CONSUME-LESS
Full name	Consume Less in the Mediterranean Touristic Communities
Scope	Malta, Spain, Greece, Italy, Albania
Pilot site	Gozo (Malta)
Geographical attributes	Coastal cities
Thematic scope	CONSUME-LESS aims to significantly reduce energy, water and waste generated by inbound tourism, specifically in coastal and tourist areas
Problem addressed	Energy and water overconsumption and waste generation in coastal and tourist areas
Coordinator	Sustainable Energy and Water Conservation Unit (Malta)
Partners	<ul style="list-style-type: none"> • Academia: EuroMediterranean Center for Sustainable Development (Italy) • SME: Ambiente Italia srl (Italy) • Administration and public sector: Provincial Government of Malaga (Spain), Municipality of Naxos and Small Cyclades Islands (Greece), Municipality of Saranda (Albania), Regione Siciliana (Italy), Ministry for Gozo (Malta), EGTC Efesini Poli - Solidarity Network (Greece), Malaga County Council (Spain)
Timeframe	Nov. 2016 - Jan.2020
Total Budget	€2,635,000
Website	https://consume-less.interreg-med.eu/



Methodology and policy approach

The CONSUME-LESS project developed integrated energy, water and waste management strategies to promote sustainable tourism models in Mediterranean cities. It worked with private and public tourism actors on the promotion of awareness about waste management and reduction. It is in line with the EU Transition Pathway for Tourism, as it focuses on the minimisation of resource use.



Assessment

Recognition

The island of Gozo, one of the six pilot areas of the project, has won the “Best in the Mediterranean” prize at the World’s Top 10 Sustainable Destinations tourism trade fair.

Local commitment

Local communities, environmental NGOs, local authorities and businesses have been involved in developing and implementing the sustainable tourism plan and promoting the use of the CONSUME-LESS label.

Opportunity

The project is working towards enlarging the ConsumelessMed network by inviting entrepreneurs and decision makers to replicate their model and sign the Consumeless destination charter.



Results

- **Introduced and implemented a territorial “Consume-less”** label which applies to specific energy, water and waste sustainable management actions (public fountains, cycling electric mobility, solar showers, photovoltaic info-points, grey water recycling, water-saving devices, separate waste collection, and waste art installations).
- **Generated interest among different stakeholders** towards waste generation reduction, including hotels and accommodations, camping sites, cafes and restaurants, food and handicraft shops and beach resorts.
- **Promoted fair trade and consumption of local products and services** by boosting their reputations through eco-labels.
- **Disseminated knowledge** on energy and water conservation in the tourism sector by collecting video and audio messages and pictures of tourists, applying storytelling and incentivising participation of tourists.

Conclusion

The CONSUME-LESS Project has significantly reduced energy water use and waste generation by promoting sustainable tourism practices. Throughout the project, other spill-over effects have harnessed the competitiveness of the sector, including the development of synergies between local operators, innovative communication tools and sound governance policies. The project’s methodology includes tailor-made communication tools, demonstrative actions and label marketing campaigns designed for every pilot case. This project has strong potential to be scaled-up when accompanied by a detailed evaluation and monitoring of the effectiveness of the campaigns.

7.6 | Co-Evolve 4GB

Acronym	Co-Evolve 4GB
Full name	Co-evolution of coastal human activities & Med natural systems for sustainable tourism & Blue Growth in the Mediterranean
Scope	Tunisia, Italy, Greece, Spain, Lebanon
Pilot site	Tunisia
Geographical attributes	Coastal and maritime areas
Thematic scope	Integrated Coastal Zone Management (ICZM) and Maritime Spatial Planning (MSP)
Problem addressed	Human pressure on natural ecosystems in coastal tourist areas (pollution, waste generation, erosion and water quality degradation) in a context of climate change
Coordinator	National Institute of Marine Sciences and technologies (Tunisia)
Partners	<ul style="list-style-type: none"> • Academia: University of Murcia, Valenciaport Foundation (Spain), National Agency for Environment Protection (Tunisia), Ministry of Public Works and Public Transport (Lebanon)) • Civil society organisations: Al Midan, AMWAJ of the Environment (Lebanon) • Administration and public sector: Region of Lazio (Italy), Region of East Macedonia & Thrace (Greece)
Timeframe	Sept. 2019 - Aug.2023
Total Budget	€2,900,000
Website	https://www.enicbcmmed.eu/projects/co-evolve4gb



Methodology and policy approach

The project uses the principles of Integrated Coastal Zone Management (ICZM) and Maritime Spatial Planning (MSP) to promote Blue Growth and adaptation to climate change in the Mediterranean, complying with the Barcelona Convention.



Assessment

Robustness

Co-Evolve 4GB is part of the wider Med Coast for Blue Growth initiative⁸⁸, which aims to support local initiatives to promote Blue Tourism. It also builds on the Interreg Med CO-EVOLVE project and extends its actions towards the southern & eastern Mediterranean.

Coordination

Co-Evolve 4GB builds on the ICZM/MSP-based planning process in the context of complex sustainable tourism scenarios. It facilitates complementary multi-level governance that involves tourism stakeholders in the development of cross-cutting plans at the local and regional levels.

Local commitment

As a result of the multiple governance frameworks that support local communities while assisting managers and planners, the project has broad social engagement.



Results

- An **integrated analysis** of threats and enabling factors for sustainable coastal tourism.
- A **toolkit with indicators** to analyse the level of sustainability of tourism.
- 2 rounds of **training** for partners and local actors to create monitoring systems, guidelines for policy-making and sustainable tourism products and strategic planning.
- Improvements and promotion of **sustainable maritime tourism** in different pilot areas in Tunisia (Sousse-Monastir and Djerba).

Conclusion

COEVOLVE- 4GB promotes coastal and maritime tourism actions while fostering coastal tourism adaptation to climate change. It enables local authorities and stakeholders in the Mediterranean to use long-term management tools. It is relevant to scale-up the project because of its wide diversity of approaches. This cross-cutting vision triggers numerous opportunities targeting business, environment and policy actors.

⁸⁸ <https://ufmsecretariat.org/project/medcoast4gb>

7.7 | MEDUSA

Acronym	MEDUSA
Full name	Development and promotion of Mediterranean Sustainable Adventure Tourism
Scope	Spain, Jordan, Lebanon, Italy and Tunisia
Pilot site	Jordan
Geographical attributes	Rural communities
Thematic scope	Adventure tourism in lesser-known destinations
Problem addressed	Territorial imbalances due to mass seaside tourism and dependence on the European market
Coordinator	Barcelona Official Chamber of Commerce (Spain)
Partners	<ul style="list-style-type: none"> • Civil society organisations: WWF Mediterranean North Africa (Tunisia), Royal Society for the Conservation of Nature (Jordan) • Administration and public sector: Association of the Mediterranean Chambers of Commerce and Industry (Spain); Jordan Inbound Tour Operators Association (Jordan); Rene Moawad Foundation (Lebanon); Puglia Region (Italy)
Timeframe	Sept. 2019 - Apr.2023
Total Budget	€3,317,314.46
Website	https://www.enicbcmmed.eu/projects/medusa



Methodology and policy approach

MEDUSA provides capacity-building to overcome economic, political, security and social challenges; and designs new routes and itineraries that create jobs and enhance tourism competitiveness. It seeks to bolster greater engagement of regional policy makers and stakeholders to also drive sustainable changes both at the policy and managerial levels.



Assessment

Recognition

The MEDUSA partners in Spain, Lebanon, Italy, Jordan and Tunisia won “the Mediterranean sub-grant Adventure Tourism Competition” as part of the MEDUSA project’s activities to enhance adventure tourism products and experiences in the Mediterranean.

Local commitment

MEDUSA seeks the inclusion of local communities in tourism development, and shares knowledge among territories. Participation is broad across public authorities and the private sector. The project is increasing the visibility of lessknown destinations and local communities to create jobs, especially for women and youth.

Capacity building

It created a platform for local stakeholders to seek potential partnerships with other operators that bring sustainable benefits to the sector. The creation of job opportunities and income growth make stakeholders more engaged in the project in the medium and long term.



Results

- One global **market research and analysis report** on adventure tourism in the Mediterranean.
- **Training sessions** on sustainable destination management and business planning.
- Strategic **alliances to foster public-private destination management** in a sustainable manner.
- One **co-creation programme** across three cross-border routes, itineraries and day trips.
- One **marketing strategy** to establish relationships with tour operators and travel agencies.

Conclusion

MEDUSA has the potential to reveal lesser-known destinations and attract tourists throughout the year. It is easily scaled up in the Mediterranean as a sustainable Adventure Tourism destination; while it raises the profile and attractiveness of new destinations. MEDUSA helps to decrease the seasonality of tourism and balances the distribution of income in the participating territories. The project also focuses on the environmental footprint of tourism activities by safeguarding biodiversity, wildlife, natural resources, and rural communities. Altogether the project helps lesser-known destinations and local communities to generate and improve adventure tourism products while boosting job creation.

7.8 | SWITCHMED

Acronym	SwitchMed
Full name	Switching to a circular economy in the Mediterranean
Scope	Algeria, Egypt, Israel, Jordan, Lebanon, Morocco, Palestine, Tunisia.
Pilot site	Lebanon
Geographical attributes	Country level (small and big towns)
Thematic scope	Circular Economy - Sustainable Consumption and Production
Problem addressed	Use of resources with high potential for circularity (plastics, textiles, food)
Coordinator	United Nations Industrial Development Organization (UNIDO)
Partners	<ul style="list-style-type: none"> International Organisations: The United Nations Environment Programme (UNEP), the United Nations Environment Programme Mediterranean Action Plan (UNEP/MAP) and its Regional Activity Center for Sustainable Consumption and Production (SCP/RAC).
Timeframe	2019 - 2023
Total Budget	€22,000,000
Website	https://switchmed.eu/



Methodology and policy approach

SwitchMed is a regional initiative that seeks to achieve a circular economy in the southern Mediterranean by changing the way goods and services are produced and consumed. It encourages policy convergence and feeds back into the regional governance and policy framework of the UNEP/MAP- Barcelona Convention. SwitchMed also relates well with the EU Tourism Transition Pathway as it promotes the circular economy within the tourism sector.



Assessment

Robustness

SwitchMed is implemented by large international organisations that provide specialised experience and tools on policy development, capacity building, business support services, demonstration activities and networking.

Coordination

It adopts different approaches to promote sustainability in tourism through the circular economy: I) Improvement of regional and national policy frameworks; II) Enhancement and alignment of industry and service providers; III) Development of sustainable and circular business models; IV) Exchange of practice and crosssectoral connections.

Capacity building

SwitchMed encourages local actors to contribute to joint efforts for sustainable goods and services in tourism. It also promotes periodic gatherings of Mediterranean stakeholders to build synergies, exchange knowledge, and scale-up socioecological innovations.



Results

- SwitchMed has provided **tools and services to the private sector**, which support an enabling policy environment, and facilitate the exchange of information among partners and key stakeholders.
- It has successfully **developed the Sustainable Consumption and Production National Action Plan (SCP-NAP)** (SDG 12) and is currently implementing it.
- It has supported green entrepreneurs and eco-innovation in the industry, by **setting up local partnerships and providing business support services**, including the transfer of methodologies, coaching and advisory services, as well as networking and access to finance.

Conclusion

Switch Med has helped promote local production and sustainable consumption through the promotion of circular economy approaches. This has in turn impacted the tourism sector, which has integrated sustainable practices, and promoted local consumption. It also serves as a tool to scale up the transition towards sustainable consumption and production as it focuses its efforts in replicating local practices in other national dimensions. The SwitchMed initiative is aligned with the New Circular Economy Action Plan adopted by the European Commission in 2020. The SwitchMed Initiative incorporates measures for mainstreaming sustainable products and empowering consumers and public buyers presented in the Action Plan including the focus on the sectors that use most resources and where the potential for circularity is high such as plastics, textiles, food.

7.9 | MED PEARLS

Acronym	<i>Med Pearls</i>
Full name	The Mediterranean as an innovative, integral and unique destination for Slow Tourism initiatives
Scope	Egypt, Greece, Jordan, Italy, Palestine, Spain
Pilot site	Egypt
Geographical attributes	Small and big towns (13 areas in 6 Mediterranean countries)
Thematic scope	Mediterranean lifestyle through Slow Tourism
Problem addressed	Mass tourism and seasonality
Coordinator	Catalan Tourism Agency (Spain)
Partners	<ul style="list-style-type: none"> • Civil society organisations: Confederation of Egyptian European Business Associations (Egypt), Palestine Wildlife Society (Palestine). • Administration and public sector: Federation of Egyptian Chambers of Commerce – Alexandria Chamber (Egypt), Municipality of Thessaloniki (Greece), Discovery Travel & Tourism LLC (Jordan), APS Mediterranean Pearls (Italy), Palestine information & Communications Technology Incubator (Palestine)
Timeframe	Sept. 2019 - May. 2023
Total Budget	€3,000,000
Website	https://www.enicbcmmed.eu/projects/med-pearls



Methodology and policy approach

Med Pearls promotes sustainable tourism through digital marketing campaigns. This project has a specific focus on Slow Tourism, which involves spending longer time in one place and interacting with the community. It offers guidelines on the use of digital products for tourism stakeholders to enhance their activities. It is in line with the Framework Convention on the Value of Cultural Heritage for Society, the Faro Convention.



Assessment

Robustness

Med Pearls is based on the successful international cross-border cooperation of **Alpine Pearls**⁸⁹, which has been a quality brand of green mobility vacations in the Alps for over 10 years.

Local commitment

Local start-ups are supported with financial and technical means for Product Development and Innovation Facilities. Training sessions are open to everyone. Actors are encouraged to develop ICT solutions (apps, virtual reality, games) and commercialise them.

Opportunity

As the project addresses both local and international markets, it contributes to developing slow tourism experiences in the Mediterranean region, and other international markets like the USA, Canada, Northern Europe, Russia or Asia.



Results

- **Creation of job opportunities** from Slow Tourism products and extension of average stay length.
- **Less known tourist areas**, like the EL-Montazah district and the Lakes of Edku and Mariou (Egypt), **are promoted**.
- In Egypt only, **39 people have been trained** on Slow Tourism product development, 26 Slow Tourism products and 6 ICT solutions have been created, and 13 action plans have been established.

Conclusion

Med Pearl's cross-selling strategy helps to ensure that the Mediterranean is perceived as an integral tourist destination, and not simply as a sum of different markets. It targets its impacts not only at local levels but also to the regional levels, showcasing a respectful, responsible and sustainable way to scale up initiatives. It also showcases the Mediterranean lifestyle through Slow Tourism which aims to connect travellers to the location they are visiting and interacting with the local community.

⁸⁹ <https://www.alpine-pearls.com/>

7.10 | CROSSDEV

Acronym	<u>CROSSDEV</u>
Full name	Cultural Routes for Sustainable Social and Economic Development in Mediterranean
Scope	Italy, Jordan, Lebanon, Palestine
Pilot site	Palestine
Geographical attributes	Rural areas (small mountain and coastal towns)
Thematic scope	Promotion of local culture and heritage, competitiveness and attractiveness of lesser-known destinations and rural areas
Problem addressed	Lack of development opportunities for disadvantaged rural areas
Coordinator	International Committee for the Development of Peoples (Italy)
Partners	<ul style="list-style-type: none"> • Academia: Jordan University of Science and Technology (Jordan), The Royal Marine Conservation Society of Jordan (Jordan) • Civil society organisations: Association for the Protection of Jabal Moussa (Lebanon); Palestinian Heritage Trail (Palestine); Culture Cooperative Society (Italy) • Administration and public sector: Ministry of Culture (Italy)
Timeframe	Sept. 2019 - May. 2023
Total Budget	€2,507,656
Website	https://www.enicbcmmed.eu/projects/crossdev



Methodology and policy approach

CROSSDEV enhances sustainable tourism practices, emphasising common heritage and resources in the Mediterranean. It sets up cultural routes in less known tourist areas to increase their competitiveness and attractiveness. It helps enhance cross-border tourism policies of Mediterranean countries. It provides know-how and skills for businesses to improve their services while protecting the environment and cultural heritage. CROSSDEV is aligned with the policy framework of the Athens Declaration as it is especially working towards enhancing and building capacities for making emerging destinations more attractive.



Assessment

Recognition

The project is a tool for social and economic development. In addition, the Palestinian Heritage Trail, received the CROSSDEV Award for the best initiative involving local communities in the development of a sustainable cultural / archaeological / gastro-nomic or nature tourism product.

Local commitment

CROSSDEV develops positive attitudes and practices in sustainable tourism, enhancing the involvement and commitment of public authorities, actors of tourism-related sectors, educational institutions, civil society organisations, youth and the general public.

Capacity building

Young people received training about sustainable tourism and youth engagement. The training strengthens the capacities of the community to create and lead local tourism campaigns.



Results

- It has **helped 2 homestays, 3 women's centres** (produce and sell local products), and **4 SMEs** to establish their business in 2021.
- It has helped increase **attractiveness of less known tourist destinations** as well as promote diversification of tourism offerings through the promotion of local and territorial assets/drivers in off season periods.
- It has **created synergies between local actors** through networking meetings to learn about each other's projects and collaborate together. As an example, the Surif women (Palestine) started selling their "Maftool" (a local dish) at another women's centre booth. Also, the Sikka Women's Centre has developed its garden as a resting place for visitors.

Conclusion

CROSSDEV promotes cultural heritage and socio-economic development through a bottom-up approach and a close connection with local stakeholders and SMEs. Further tourism skills uptake by public authorities and businesses is useful for creating stability and balance across both sides of the Mediterranean. It will support the development of sustainable tourism and social inclusion of local communities.

7.11 | Concluding remarks

Overall the case studies presented above are relevant for transitioning to sustainable coastal and maritime tourism in a post-pandemic context in the Mediterranean. They have shown clear results in pilot sites located in northern and southern Mediterranean countries. In addition, the tools and outputs can be scaled up and replicated in other Mediterranean territories. The Interreg MED Horizontal project, **Sustainable Tourism Community** (STC)¹ also facilitates the mainstreaming and transferring of successful practices and policies in other areas, through the Catalogue of tools² and Best practices³.

¹ <https://sustainable-tourism.interreg-med.eu/>

² <https://sustainable-tourism.interreg-med.eu/catalogue-of-projects-outputs-and-policy-targets/>

³ https://planbleu.org/wp-content/uploads/2022/08/Plan_Bleu_STC_BestCase_Catalogue__6_-2.pdf

ANNEX II

Survey

A qualitative online survey was sent to key Mediterranean Tourism Stakeholders through the Sustainable Tourism Community (STC). The results of the survey helped to better identify the progress and remaining issues in the Mediterranean region.

The survey provided valuable data to:

01. Identify important issues and challenges faced by Mediterranean tourism;
02. Assess opportunities and obstacles in the way of sustainable coastal tourism and ecotourism and
03. Identify new trends, initiatives and case studies.

This survey was structured around the following **six areas**:

01. Profile of the organisation
02. Main issues related to tourism in the Mediterranean
03. Trends in the Mediterranean
04. Challenges for sustainable tourism in the Mediterranean
05. Key initiatives to promote sustainable tourism in the Mediterranean
06. Case studies

The survey was launched in May 2022 and open for 3 weeks. The aim of the survey was to confirm the adequacy of the data provided in the literature review. Moreover, it also set out to identify relevant case studies to be included in the seventh chapter. It confirms that the survey's answers (primary data) coincided with the grey and academic sources (secondary data). Tourism stakeholders also suggested relevant case studies which have been considered in the report.

The survey was structured as follows:

1. Profile of your organisation

Name of your organisation:

Profile:

- | | |
|---|--|
| <input type="checkbox"/> Public authority (local, regional, national) | <input type="checkbox"/> (Large) Business (except SME) |
| <input type="checkbox"/> Infrastructure and (public) service provider | <input type="checkbox"/> SME |
| <input type="checkbox"/> Interest groups (including NGOs) | <input type="checkbox"/> International Governmental Organisation (IGO) |
| <input type="checkbox"/> Education, training and research centre | <input type="checkbox"/> Other |

Your position in your organisation:

Geographic scope of your organisation:

- | | |
|--|---|
| <input type="checkbox"/> Global | <input type="checkbox"/> National (country) |
| <input type="checkbox"/> Europe | <input type="checkbox"/> Region (sub-national) |
| <input type="checkbox"/> Mediterranean | <input type="checkbox"/> Local (city, county or sub-regional) |

Could you please briefly describe the main activities or scope of your organisation?

.....


Your organisation has expertise in:

- | | |
|---|---|
| <input type="checkbox"/> Coastal tourism (including resorts and hotels) | <input type="checkbox"/> Economic development |
| <input type="checkbox"/> Cruising industry | <input type="checkbox"/> Territorial cohesion / Cooperation |
| <input type="checkbox"/> Ecotourism | |

Have you ever been involved in these projects?

- | | |
|--|--|
| <input type="checkbox"/> Interreg Med: | <input type="checkbox"/> Horizon Europe |
| <input type="checkbox"/> ENI CBC Med | <input type="checkbox"/> Other (please specify the name and scope):..... |

2. Main issues, obstacles and policies

This section aims to identify the most important challenges and issues related to coastal tourism in the Mediterranean considering the following main themes: environment, social, economy, culture and governance.

Based on your opinion, please evaluate the following ENVIRONMENTAL issues according to their impact or importance for coastal tourism:

- | | |
|--|--|
| <input type="checkbox"/> Water pollution | <input type="checkbox"/> Water consumption |
| <input type="checkbox"/> Land use change | <input type="checkbox"/> Waste management |
| <input type="checkbox"/> Biodiversity losses | |

Please share other environmental issues for Mediterranean coastal tourism:

.....

Please evaluate the following SOCIAL issues according to their impact or importance for coastal tourism

- | | |
|---|---|
| <input type="checkbox"/> Overtourism, overcrowding and massification | <input type="checkbox"/> Underqualified, precarious and seasonal jobs |
| <input type="checkbox"/> Degradation of living standards for residents | <input type="checkbox"/> Degradation of workers' conditions |
| <input type="checkbox"/> Conflicting access to public services or common goods (transport, water, energy, food, etc.) | <input type="checkbox"/> Youth or women's exclusion |
| <input type="checkbox"/> Saturation or standardisation of public spaces (historic centres, beaches) | |

Please share with us other social issues relevant for sustainable tourism in the Mediterranean:

.....

Please evaluate the following ECONOMIC issues according to their impact or importance for coastal tourism

- | | |
|---|---|
| <input type="checkbox"/> Limited benefits for local businesses | <input type="checkbox"/> Seasonality of activity |
| <input type="checkbox"/> Tax evasion and black market / informal economy | <input type="checkbox"/> Economic dependency on tourism |
| <input type="checkbox"/> Pressure, collusion and/or corruption of public officers | <input type="checkbox"/> Low level of competitiveness |

Please share with us other economic issues relevant for sustainable tourism in the Mediterranean:

.....

What are the most important OBSTACLES to achieving sustainable coastal tourism in the Mediterranean?

(Please select up to 3 items)

- | | |
|---|--|
| <input type="checkbox"/> Lack of coordination and cooperation between (public/private) actors | <input type="checkbox"/> Weak political attention and policy support |
| <input type="checkbox"/> Information and data are not available or of poor quality | <input type="checkbox"/> Lack of technical ability, entrepreneurship and/or skills |
| <input type="checkbox"/> Lack of funding and economic incentives | <input type="checkbox"/> Few/no alternative business or tourism models |
| <input type="checkbox"/> Insufficient implementation tools and/or monitoring/compliance | |

Based on your perspective, what are the most relevant ACTIONS to promote sustainable coastal tourism?

(Please select up to 3 items)

- | | |
|--|--|
| <input type="checkbox"/> Improvement of workers' rights and social benefits | <input type="checkbox"/> Better monitoring and transparency of the tourism value chain |
| <input type="checkbox"/> Broader consultation and implication of local communities | <input type="checkbox"/> Better economic regulation, incentives and/or taxation |
| <input type="checkbox"/> Enforcement of environmental or social regulation | <input type="checkbox"/> Inclusive governance and decision-making processes |

Please share with us other relevant points linked to policies for sustainable tourism in the Mediterranean:

.....

3. Trends in the Mediterranean

Tourism is an evolving and changing industry, and keeping up with these changes requires an understanding of the forces and changes that shape this industry's outcomes (outcomes might be the number of exports, incomes, added-value and job creation)

What are the most relevant TRENDS in Mediterranean coastal tourism?

- | | |
|---|---|
| <input type="checkbox"/> Deseasonalisation | <input type="checkbox"/> Social and community-based tourism |
| <input type="checkbox"/> Digitalisation & Information and Communications Technology (ICT) | <input type="checkbox"/> Slow tourism |
| <input type="checkbox"/> Greener tourism and low-carbon travel | <input type="checkbox"/> Domestic/local tourism development |

Please share with us other relevant/new trends :

.....



4. Institutional frameworks and new initiatives

The report will include several legal frameworks of importance to the sustainable development of tourism in the Mediterranean

What are the most relevant INSTITUTIONAL FRAMEWORKS and INITIATIVES in Mediterranean coastal tourism?

- | | |
|---|---|
| <input type="checkbox"/> Paris Agreement and the Glasgow Declaration | <input type="checkbox"/> Interreg Med / EuroMED Declarations or initiatives |
| <input type="checkbox"/> Convention on Biological Diversity and the Aichi targets | <input type="checkbox"/> ENI CBC declarations or initiatives |
| <input type="checkbox"/> Post-2020 Mediterranean MPA roadmap | <input type="checkbox"/> Global Tourism Plastic Initiative |
| <input type="checkbox"/> Barcelona Convention and the COP 22 outcomes | <input type="checkbox"/> EU tourism transition Pathway |

Please share with us other relevant initiatives:

.....

5. Challenges for sustainable tourism in the Mediterranean

The report will focus on the key challenges for sustainable tourism in the Mediterranean. Some challenges: Climate change adaptation and mitigation, Biodiversity preservation and regeneration, The circularity of tourism services, Innovation and digitalization, COVID-19 pandemic recovery

What are the most relevant CHALLENGES in Mediterranean coastal tourism?

- | | |
|---|---|
| <input type="checkbox"/> Mitigation of climate change | <input type="checkbox"/> Clean transport and low-carbon mobility |
| <input type="checkbox"/> Adaptation to climate change | <input type="checkbox"/> Jobs creation and skills development |
| <input type="checkbox"/> Covid-19 recovery | <input type="checkbox"/> Business development and economic benefits |
| <input type="checkbox"/> Circular economy & resource efficiency | <input type="checkbox"/> Local communities and social inclusion |
| <input type="checkbox"/> Marine litter & waste management | |

Please share with us other relevant/new challenges:

.....

6. Case studies

The report will include a range of concrete case studies of sustainable tourism in the Mediterranean that answer the challenges identified in the Mediterranean region to provide inspiration about available solutions.

Do you have a case study to share with us? Please, share it with us. It should be a clear example developed in the Mediterranean addressing tourism issues/challenges.

Please, specify the project title, objectives, website, etc.

.....

1. | Key results of the survey

1. Profile of the organisations

The survey was answered by **33 respondents** whose organisations belong to the following countries and organisations. This part of the questionnaire shows the representivity and diversity of the respondents.

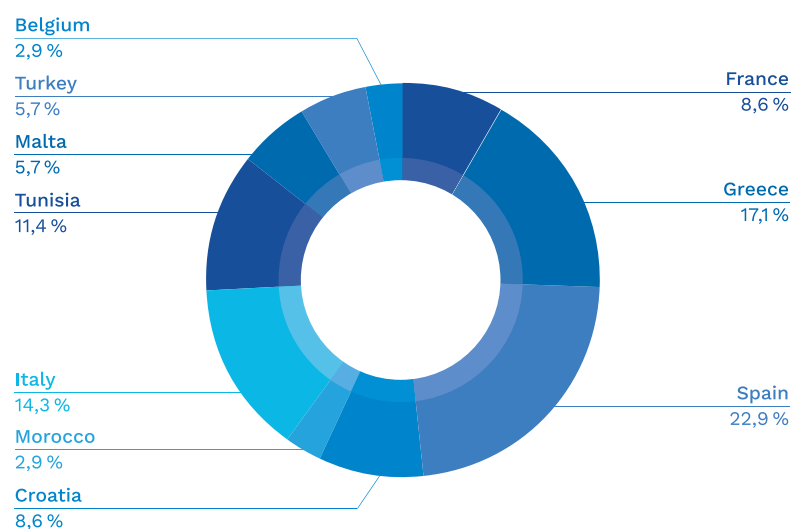
Organisation	Headquarters
Ministry of Energy Transition and Sustainable Development	Marrakech (Morocco)
National Agency for Environmental Protection	Tunis (Tunisia)
Institut National des Sciences et Technologies de la Mer-INSTM	Carthage (Tunisia)
Littoral Protection & Planning Agency	Tunis (Tunisia)
National Agency for Environment Protection	Tunis (Tunisia)
Turkish Ministry of Culture and Tourism	Ankara (Türkiye)
Comité Régional Du Tourisme Occitanie	Montpellier (France)
Syndicat Mixte Canigo Grand Site	Prades (France)
Club Med	Paris (France)
UNEP/MAP - Barcelona Convention Secretariat	Athens (Greece)
PROMEA	Athens (Greece)
Network of European Cities for Sustainable Development	Athens (Greece)
Municipality of Rethymno	Rethymno (Greece)
Pieriki Anaptixiaki S.A.-O.L.A. Development Agency	Katerini (Greece)
Region of Thessaly	Larisa (Greece)
Iberostar	Palma de Mallorca (Spain)
IUCN Center for Mediterranean Cooperation	Málaga (Spain)
Barcelona Provincial Council	Barcelona (Spain)
MedCruise	Barcelona (Spain)
Union for the Mediterranean	Barcelona (Spain)
Andalusian Federation of Municipalities and Provinces	Sevilla (Spain)
Junta de Andalucía	Sevilla (Spain)
EU Funds technician	Granada (Spain)
PAP/RAC	Split (Croatia)
Adriatic Ionian Euroregion	Dubrovnik (Croatia)
Regional Agency DUNEA	Dubrovnik (Croatia)
NECSTouR	Brussels (Belgium)
Energy and Water Agency	Valletta (Malta)



Organisation	Headquarters
Ministry for Tourism	Valletta (Malta)
Università Ca' Foscari Venezia	Venice (Italy)
Università di Camerino	Camerino (Italy)
Area Science Park	Trieste (Italy)
Observatory on Tourism in the European Islands	Palermo (Italy)
Italian Ministry of Ecological Transition	Rome (Italy)

Location

The majority of the organisations that took part in the survey are based in *Spain* (22,9%), *Greece* (17,1%), and *Italy* (14,3%), followed by *Tunisia*, *France*, and *Croatia* (8,6%). *Türkiye* and *Malta* count for 5,7%, and finally *Belgium* 2,9%. Graph 2 (below) shows the organisations' location per Country.

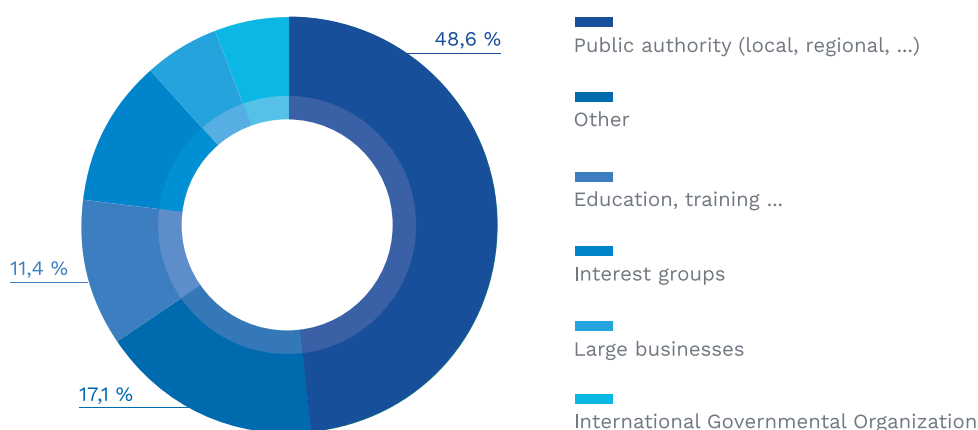


Graphic 2. Location (COUNTRY)



Type of organisation

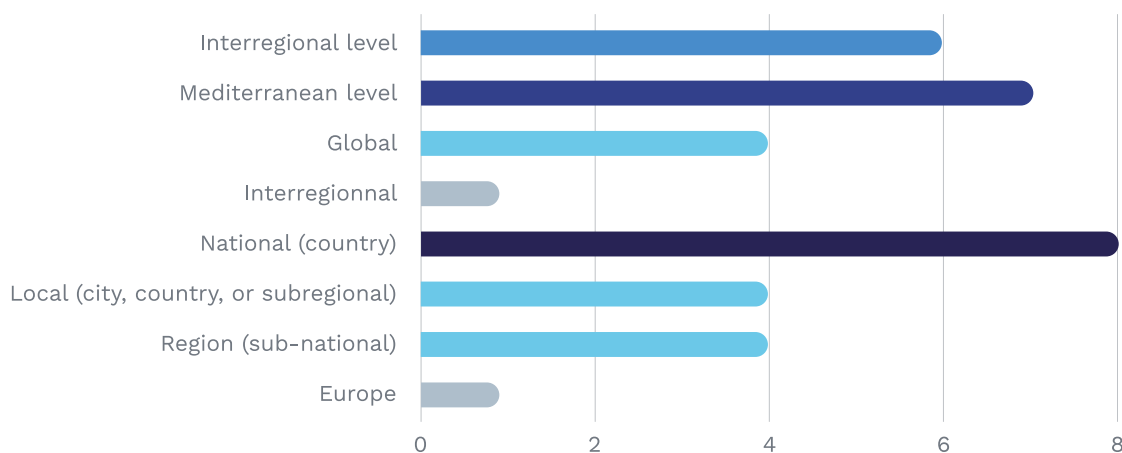
Regarding the type of organisation, Graph 3 (below) shows the result of the 33 responses. Almost half of the organisations are *Public authorities (local, regional, national)* - 48.6%, and Other types of organisations take second place. Equally, *Education, training and research centres* with Interest groups (including NGOs) place in third position, accounting for 11.4%. The fourth type of organisation - 5.7% - is International Governmental Organisations (IGO) and (Large) Businesses.



Graphic 3. Type of organisation

Geographic scope

Below, Graph 4 shows the geographic area where the interviewed organisations operate. The majority (8) work at the *National level*, and *Interregional level* (7+1). The Interregional level usually means Europe, Mediterranean, National (country), Regional (sub-national), and Local (city, country, or sub-regional) levels. Relevant ones are dedicated to the *Mediterranean level* (7). Equally, in third place, are *Global, Local, and Regional organisations*.



Graphic 4. Geographic scope

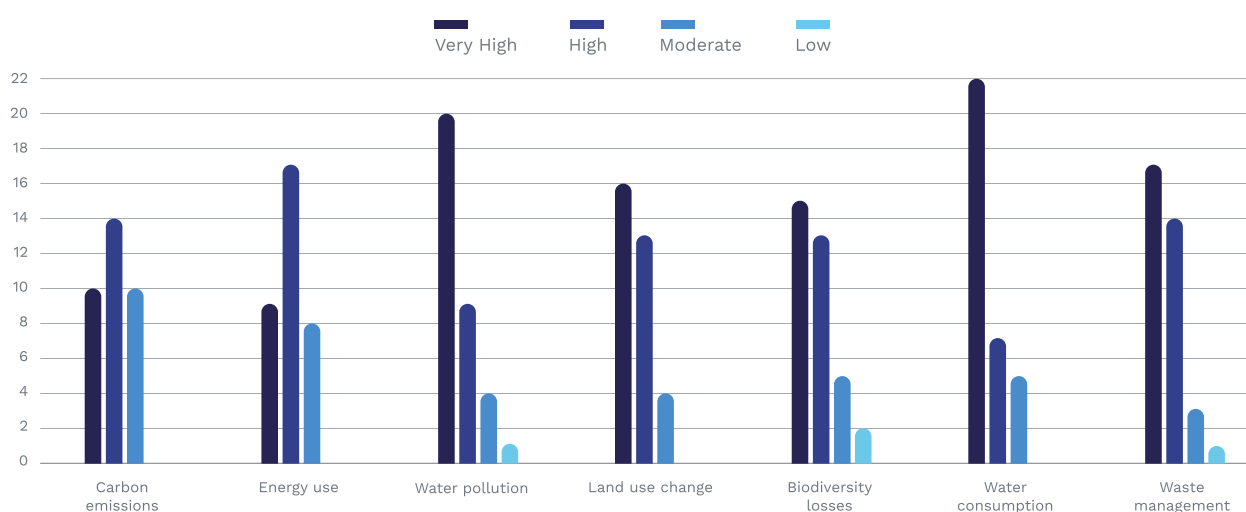
Finally, most of the participants have expertise in coastal tourism, the cruising industry, ecotourism, economic development and territorial cohesion and have participated in programmes such as the Interreg MED and the ENI CBC MED programmes.

2. | Issues, obstacles and policies

1. Environmental issues

Main environmental issues

The perception of the organisations (Graph below) regarding the main environmental issues are: Carbon Emissions, Energy Use, Water Pollution, Land Use Change, Water Consumption, Biodiversity Loss, and Waste Management. The impact perceived for all of those is Very High (in Red) - especially for Water pollution, Water consumption, and Waste Management - or High (in Blue), especially for Energy use and Carbon emissions. The values are between around 40 and 60%. Those impacts are considered Moderate for about 12-30%. The Low category almost does not appear, and if it does, it accounts for around 3-5% of responses.



Graphic 8. Evaluation of the ENVIRONMENTAL issues according to their impact for coastal tourism

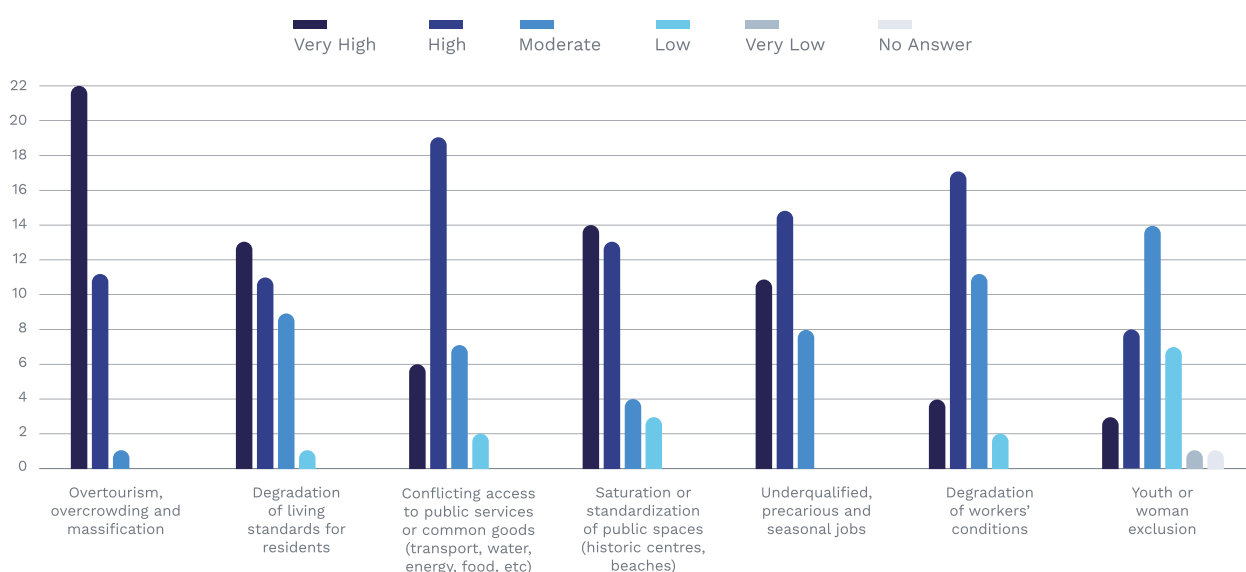
Other environmental issues mentioned by the respondents are as follows:

- Blue Economy
- Beach erosion and coastal squeeze
- Transportation to coastal areas with high carbon emissions
- Loss of cultural identity
- Citizens moving out of the city centres to turn their homes into apartments
- Degradation of quality of life
- Water scarcity, during the summer seasons in coastal areas, as well as in the winter time in mountain regions
- Seasonality (overtourism - saturation)
- Mass urbanisation in coastal areas
- Climate change related effects
- Air pollution (moderate)

2. Social issues

The Graph 9. below explains the perception of the organizations regarding the main social issues. In particular, Overtourism, overcrowding, and massification represent the Very High impact perceived, followed by Saturation or standardization of public spaces (historic centres, beaches) with a Very High (in Red) and High (in Blue) impact perception. Degradation of living standards for residents in the third place, followed by Conflicting access to public services or common goods (transport, water, energy, food, etc). Underqualified, precarious, and seasonal jobs and the Degradation of workers' conditions confirm the High (in Blue) perception of those impacts. Youth or woman exclusion show Moderate (41%) and Low (21%) perception from the organization regarding these last two impacts.

Main social issues



Graphic 9. Evaluation of the SOCIAL issues according to their impact for coastal tourism

Other social issues

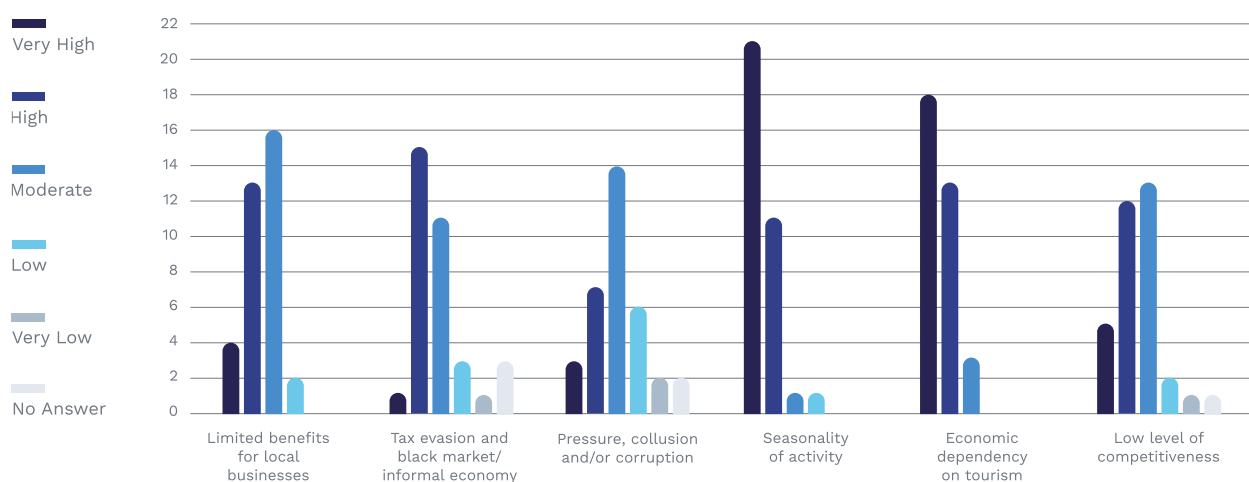
- Difficulties for hosting seasonal workers (beds/locations)
- Tourism monoculture; gentrification
- High seasonality, job seasonality
- Loss of authenticity (very high)
- Homes in historic centres are rented to tourists, expelling residents from city centres (high)
- Residents are not considered in strategic planning
- Corporate Social Responsibility (CSR)



3. | Economic issues

Main economic issues

The graph below shows the perception of the organisations regarding the main economic issues for the sector in the Mediterranean region, in which the questions without answers were more than in previous sections. The most important economic issue considered by the respondents was, with a very high level of importance: the seasonality of coastal tourism with 61.8%, followed by the economic dependency on tourism.



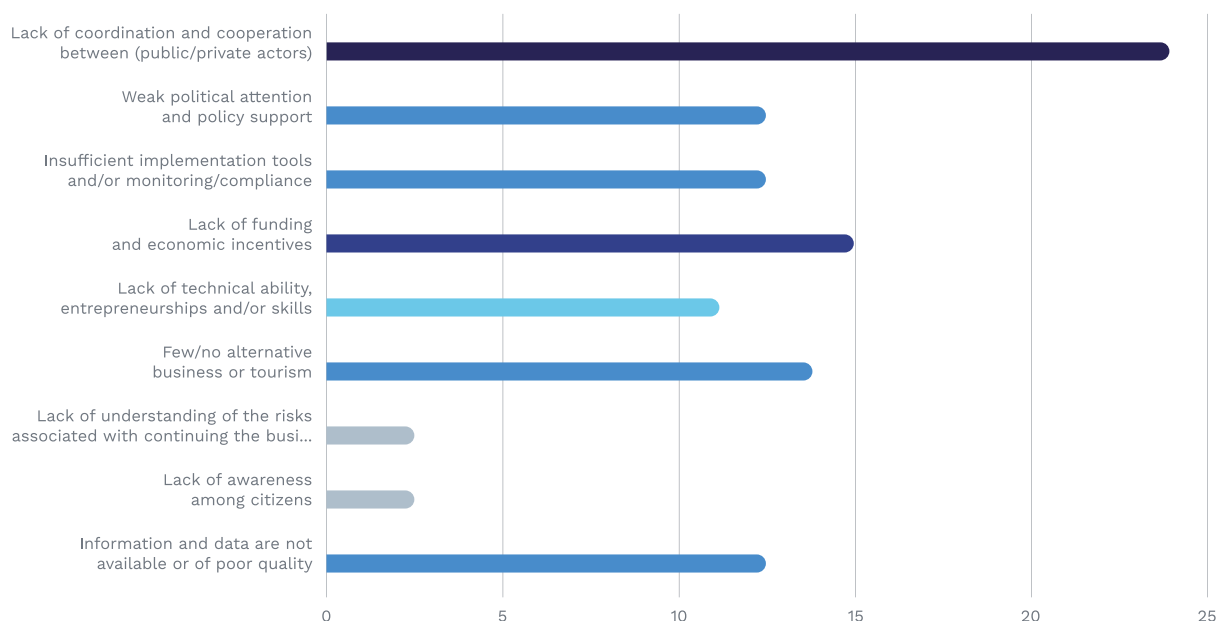
Graphic 10. Evaluation of the ECONOMIC issues according to their impact for coastal tourism

Other economic issues

- Reorientation towards nearby clients of the region or of neighbouring regions/France: risk of lower purchasing power
- Lack of circular economy policies for sustainable tourism in MED area
- Service quality

4. | Main obstacles

The most voted answers received for the most relevant obstacles to achieving sustainable tourism in the Mediterranean were: lack of coordination and cooperation between (public/private) actors, lack of funding and economic incentives and the lack of alternative business or tourism models

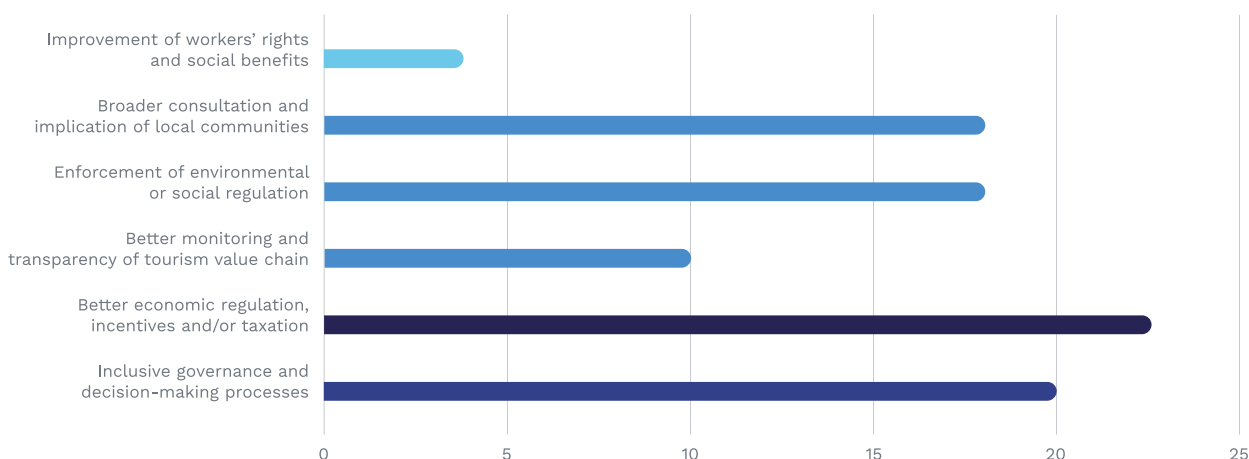


Graphic 11. The most important OBSTACLES to reach a sustainable coastal tourism in the Mediterranean

The answers received in regards to the most relevant actions to promote sustainable coastal tourism were: better economic regulation, incentives and/or taxation, followed by inclusive governance and decision-making processes and broader consultation and implication of local communities and enforcement of environmental or social regulation.

Based on your perspective, what are the most relevant ACTIONS to promote sustainable coastal tourism?

(Please select up to 3 items) — 31 answers

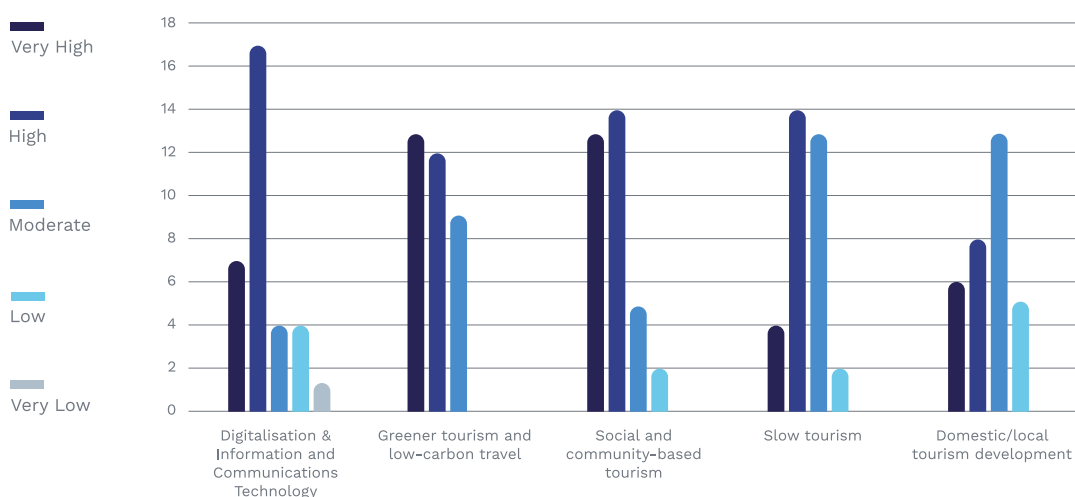


Other relevant answers

- Improve training of tourism destination managers and common/shared monitoring tools
- Integration of sustainability in all the aspects of tourism development;
- Apply the principles of circular economy to tourism
- Lack of circular economy policies

3. | Trends

The most relevant trends identified by the respondents were: greener tourism and low-carbon travel and social and community-based tourism, followed by digitalisation of the sector.



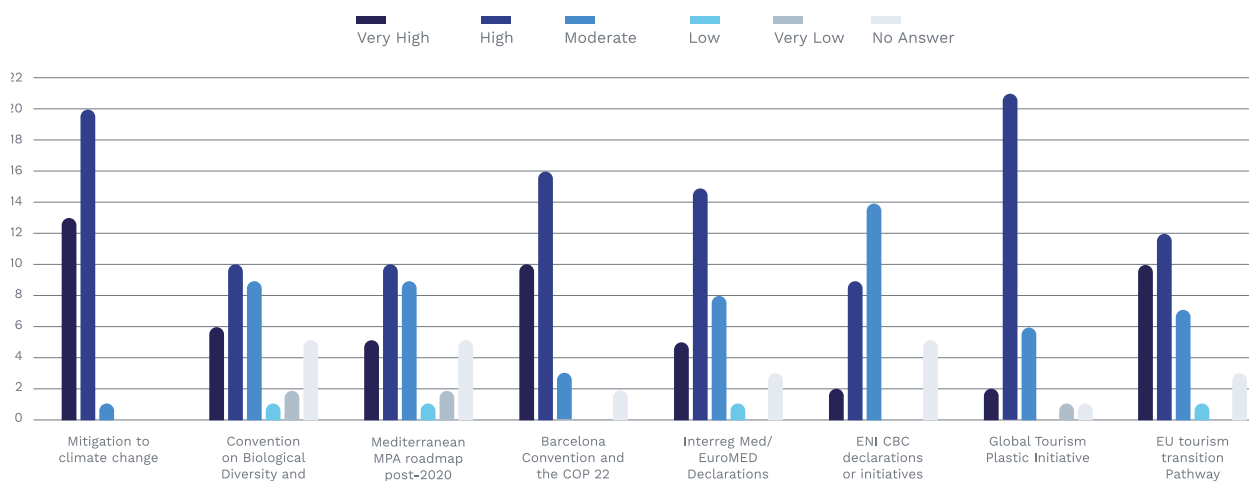
Graphic 28. Trends

Other relevant answers

- Workation (travel that combines business trips with leisure trips) has increased since the pandemic

4. | Institutional frameworks and initiatives

To follow, the graph below reflects the most relevant institutional frameworks and initiatives in Mediterranean Coastal tourism. The most important result is the Mitigation of climate change, and secondly, Barcelona Convention and the COP22 outcomes together with EU Transition Pathway for Tourism. The majority of the organisations surveyed considered the Global Tourism Plastic Initiative as highly relevant (High).



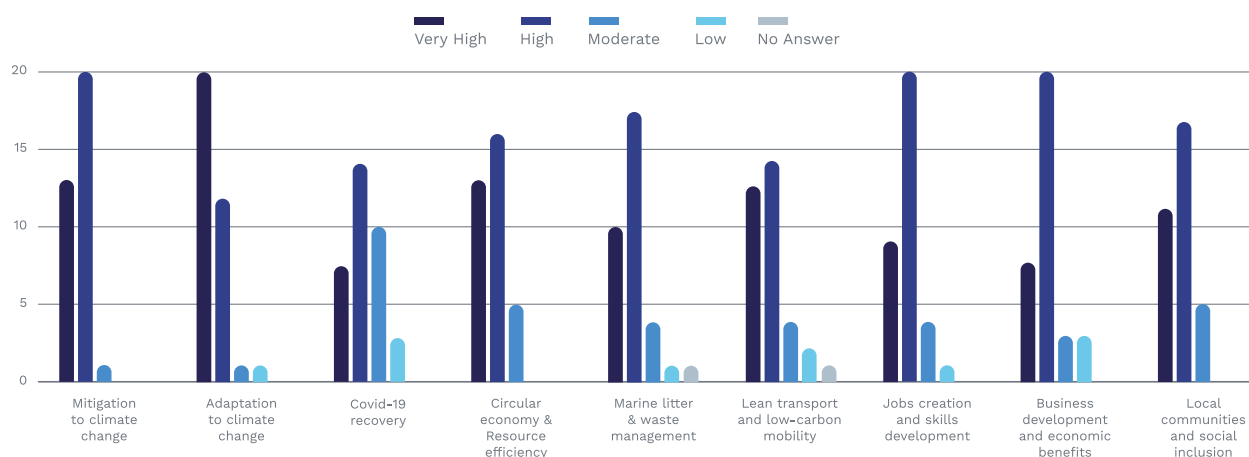
The most relevant INSTITUTIONAL FRAMEWORKS and INITIATIVES in Mediterranean coastal tourism

Other relevant answers

- 2030 Agenda and SDGs, MSSD
- Mediterranean Cooperation Alliance

5. | Challenges

The graph below - the most relevant challenges - shows the emergency of *Adaptation to climate change*, as a Very High (in Red) challenge for coastal tourism, and the Mitigation to climate change as Very High and High. Also, promoting *Circular Economy and Resource efficiency* scored Very High. There is also a High (in Blue) need for *Jobs creation and Business development*, together with the *Local communities and social inclusion*. It is also interesting to note the High and Moderate (in yellow) need for *Recovery from COVID-19*.



Other relevant challenges

- Water preservation (very high)
- Seasonality and better coordination among MED countries



6. | Case studies

Case studies promoting sustainable tourism in the Mediterranean mentioned by respondents:

1	<i>Herit Data</i> : 6 case studies to prevent mass tourism in urban, port, and heritage areas.
2	<i>Wave of change</i> (Iberostar): CSR strategy to move towards a circular economy, promote the responsible consumption of seafood, and improve coastal health.
3	<i>SEIS II SOUTH</i> (European Environment Agency): Environmental Information Sharing System that promotes the regular production and sharing of reliable environmental data.
4	<i>MEET Network</i> : supporting Mediterranean protected areas in creating sustainable offerings.
5	<i>DestiMED PLUS</i> : advocating for integration of tourism and conservation policies at sub-national scale.
6	<i>POsbemed</i> : sustainable management of posidonia Beaches.
7	<i>G20 Spiagge</i> : Main Italian seaside destination network.
8	<i>ConsumelessMed</i>
9	<i>Coasting Plus</i> : Transferring integrated coastal governance for sustainable tourism.
10	Island of Djerba and Sousse
11	<i>INHERIT Project</i>
12	<i>INCIRCLE</i>
13	<i>BluemedPlus</i> : multidisciplinary model for sustainable and responsible coastal tourism development.
14	Ports of Dubrovnik-Croatia, Heraklion-Greece, Galataport-Istanbul.

7. | Analysis and Conclusions

The aim of the survey was to confirm the adequacy of the data provided in the literature review. Moreover, it also intended to identify relevant case studies to be included in the seventh chapter. This annex confirms that the survey's answers (primary data) coincided well with the grey and academic sources (secondary data). Tourism stakeholders also suggested relevant case studies which have been taken into account in the report.

The main highlights of the survey reveal that the most concerning **environmental challenges** are by order of priority: water consumption, water pollution, land use change, biodiversity loss, waste management, energy use and carbon emissions.

While the most pressing **social challenges** are: overtourism, overcrowding and massification; underqualified, precarious and seasonable jobs; conflicting access to public services or common goods; youth or women's exclusion; mass tourism prevails over ecotourism; weak corporate social responsibility.

Lastly, the most urgent **economic challenges** underlined by respondents are by order of priority: collusion and/or corruption of public officers; economic dependency on tourism, pressure, limited benefits for small and local businesses, low quality of services and ineffective implementation of a circular economy.



Apart from the **main challenges** perceived by the stakeholders, the analysis reveals which aspects are perceived as more vulnerable, or worth attention. In this regard, there is a general tendency to focus on **water quality, distribution and pollution** while land, biodiversity and waste concerns become secondary. In line with that trend, the respondents consider that the **main obstacles** to transforming coastal tourism are the **lack of coordination and cooperation** among sectors; the lack of funding and the absence of feasible alternatives to conventional services.

Before this scenario, certain **actions** have been proposed to deal with such inconveniences. The first is to enhance **economic regulation, incentives and/or taxation** so the tourism sector is more accountable to environmental targets. The second is to promote **inclusive governance and decision-making processes** and democratise the governance process. The third is to create better **accountability procedures** such as social regulations and other soft-law mechanisms as a good solution to encourage the alignment of tourism policies with sustainable development.

The analysis also reveals a greater tendency of **awareness and commitment towards a greener tourism** spectrum by civil society. This is complemented by a greater proliferation of institutional endeavours. The most relevant initiatives indicated by the participants are the **EU Transition Pathway for Tourism**, the **Paris Agreement** and the **Glasgow Declaration**. However, some are perceived as less relevant, such as the **Global Tourism Plastic Initiative**.

Finally, the survey shows the most **challenging aspects** of transformation perceived by the participants. **Adaptation to climate change and mitigation** is ranked number one. The tourism industry also faces difficulties when it comes to incorporating **circular economy** activities while maintaining the efficiency of tourism products and services. Other factors such as **post-COVID-19** recovery are perceived to play a key role when accelerating the sustainable coastal tourism agenda.

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STATE OF PLAY OF TOURISM IN THE MEDITERRANEAN

A Roadmap for a Greener, Inclusive & Resilient
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NOVEMBER, 2022

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