

TRANSNATIONAL YEAR-ROUND TOURISM STRATEGY FOR MEDITERRANEAN ISLAND DESTINATIONS

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Draft: 22/06/2021

Interreg Mediterranean



Project co-financed by the European
Regional Development Fund



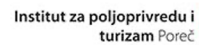
WINTER MED

WINTER MED project is co-financed by the **Interreg MED Programme**, through the European Regional Development Fund (**ERDF**)

Interreg MED Programme gathers **13 European countries** from the Northern shore of the **Mediterranean** working for **sustainable growth** in region

WINTER MED promotes the **transition from the 3S (Sea-Sun-Sand) tourism** of insular tourist destinations during the summer to an **alternative, sustainable, all-year round** use of these territories

It provides **tools to change and upgrade** one of the key sectors of the Mediterranean area



PROJECT PARTNERSHIP



CPMR
CRPM



COLLETTIVITÀ di CORSICA
COLLECTIVITÉ de CORSE
Agence di u Turismu di la Corsica
Agencia de u Turismu de la Corse



Institut za poljoprivredu i turizam Poreč



Institute of Agriculture and Tourism Poreč



DUBROVNIK-NERETVA REGIONAL DEVELOPMENT AGENCY



G CONSELLERIA
O MODEL ECONOMIC,
I TURISME I TREBALL
B AGENCIA ESTRATEGIA
/ TURISTICA ILLES BALEARS



LARNACA & FAMAGUSTA DISTRICTS DEVELOPMENT AGENCY

CYPRUS

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Context



Context

COVID-19

COVID – 19 IMPACT IN TOURISM

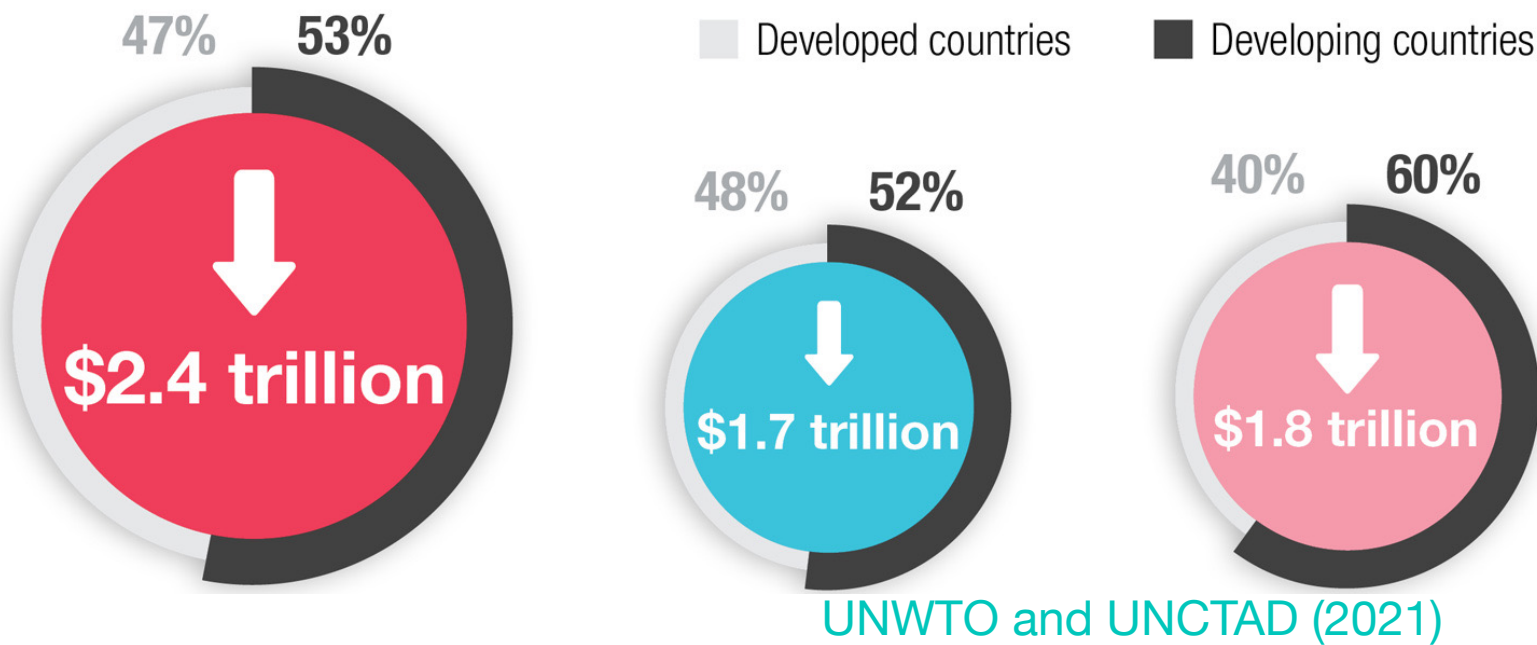


GLOBAL ECONOMY COULD LOSE OVER \$4 TRILLION DUE TO COVID-19 IMPACT ON TOURISM

ALL REGIONS | 30 JUN 21

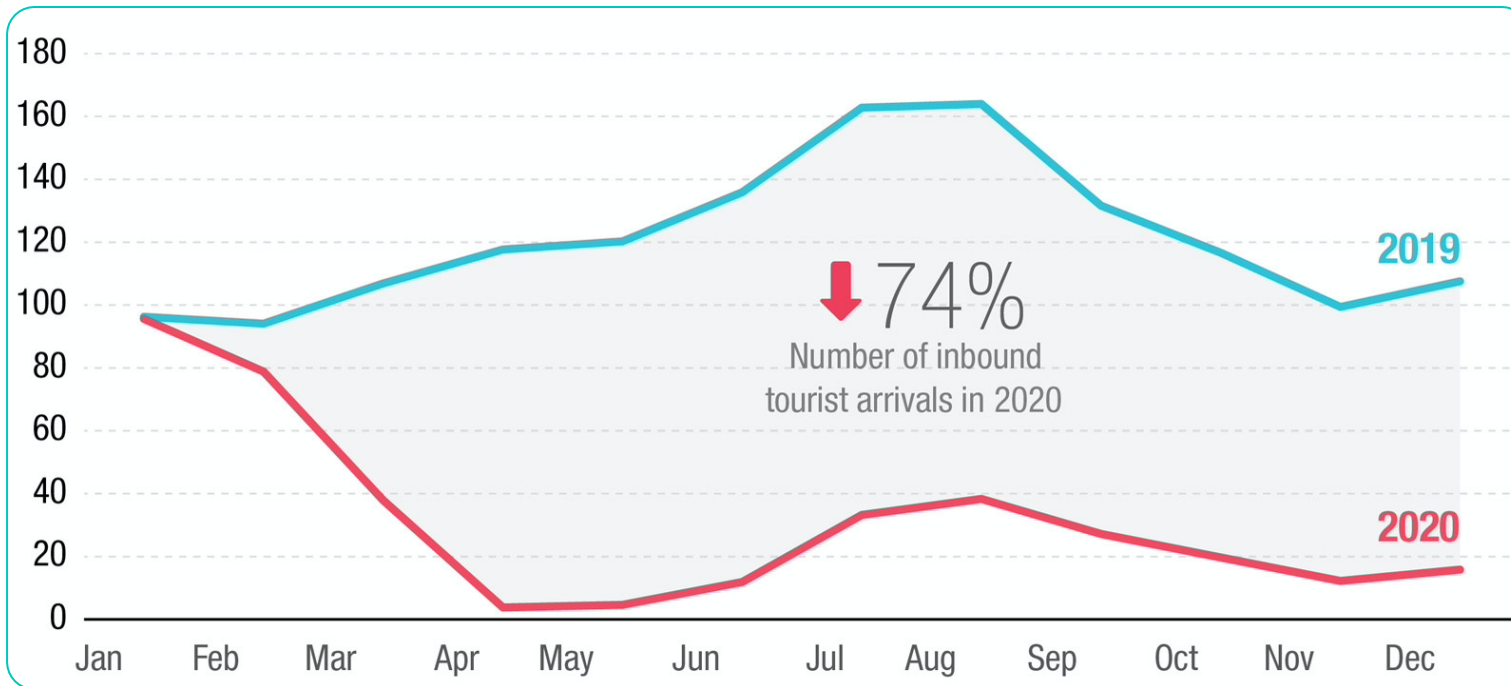
Economic losses are mounting in developing countries due to the absence of widespread COVID-19 vaccinations.





COVID – 19 IMPACT IN TOURISM

COVID – 19 IMPACT IN TOURISM



UNWTO and UNCTAD (2021)

COVID – 19 IMPACT IN TOURISM

Country	Sim 1	Sim 2	Sim 3	Region	Sim 1	Sim 2	Sim 3
Turkey	-9,1	-6,3	-7,8	Central America	-11,9	-7,5	-9,9
Ecuador	-9,0	-5,5	-7,5	East Africa	-9,3	-6	-7,9
South Africa	-8,1	-5,5	-6,9	South East Asia	-8,4	-5,6	-7,1
Ireland	-5,9	-4,1	-5	North Africa	-7,5	-5	-6,4
Switzerland	-4,3	-3	-3,6	Rest of SACU	-6,3	-4,4	-5,3
Republic of Korea	-3,8	-2,7	-3,3	Rest of Asia	-5,8	-4,1	-3,1
Australia/New Zealand	-3,7	-2,7	-3,2	East European Union	-4,7	-3,3	-3,7
United Kingdom	-3,2	-2,3	-1,6	West Africa	-4,6	-3,1	-3,9
France	-3,2	-2,3	-2,7	Rest of the World	-3,9	-2,7	-3,2
Norway	-2,5	-1,8	-2,1	East and Central Europe	-3,5	-2,5	-3
Argentina	-2,4	-1,7	-2	Middle East	-3,1	-2,2	-2,5
Germany	-2,4	-1,7	-1,3	Rest of South Asia	-2,8	-2	-2,4
Colombia	-2,3	-1,7	-2	North European Union	-2,7	-1,9	-1,9
United States of America	-2,1	-1,5	-1,1	Caribbean	-2,5	-1,8	-2
China/Hong Kong SAR	-2,0	-1,4	-1,7	Mediterranean Europe	-2,3	-1,6	-1,4
India	-1,9	-1,4	-1,7	Rest of South America	-1,9	-1,4	-1,5
Canada	-1,9	-1,4	-1	World	-2,7	-1,9	-2
Mexico	-1,6	-1,2	-1,3				
Russian Federation	-1,5	-1,1	-1,3				
Japan	-1,0	-0,7	-0,8				
Brazil	-0,6	-0,5	-0,6				
Nigeria	-0,3	-0,2	-0,2				

UNWTO and UNCTAD (2021)

COVID – 19 IMPACT IN TOURISM

Lock down period

- Huge losses for all tourism industries
- Brand damage
- Losing clients for the medium term, not just immediate because of the long lasting crisis situation
- High unemployment, partially not easy to recover in the short term
- Final closures of businesses

COVID – 19 IMPACT IN TOURISM

Opening period without vaccine

- Severe losses for all businesses relying on business models that depend on high volume of sales
- Moderate losses for businesses relying on smaller volume higher prices
- Investments needed to adapt their businesses, when financial situations are at the lowest possible
- Losing talent, employees that cannot be re-taken since the business model is not back to normal, difficult later on to find them again
- Confusing regulations from local, regional, national and European authorities, complexity of understanding procedures, hence arriving late to subsidy / credit opportunities
- Digital skills are lacking and this is even more critical when businesses need to stand out from the crowd to showcase their protocol implementation and communicate safety and world class experiences
- Carrying capacity regulations and limitations making businesses not profitable
- Final closures of businesses

COVID – 19 IMPACT IN TOURISM

Hopefully final reopening as vaccination rapidly unfolds

- Flows are starting again, severe – moderate losses for all businesses relying on business models that depend on high volume of sales
- Transportation companies are being cautious in terms of itineraries and frequency with the impact this has on local destinations, especially islands
- High desire by demand to enjoy sun and sand by the summer 2021, what next?
- Huge uncertainty with new mutations of the virus and current vaccine protection
- Uneven vaccine rates across the globe
- Confusing regulations from local, regional, national and European / International authorities, complexity of understanding procedures, hence arriving late to subsidy / credit opportunities

Sustainable
Production and
Consumption

Context



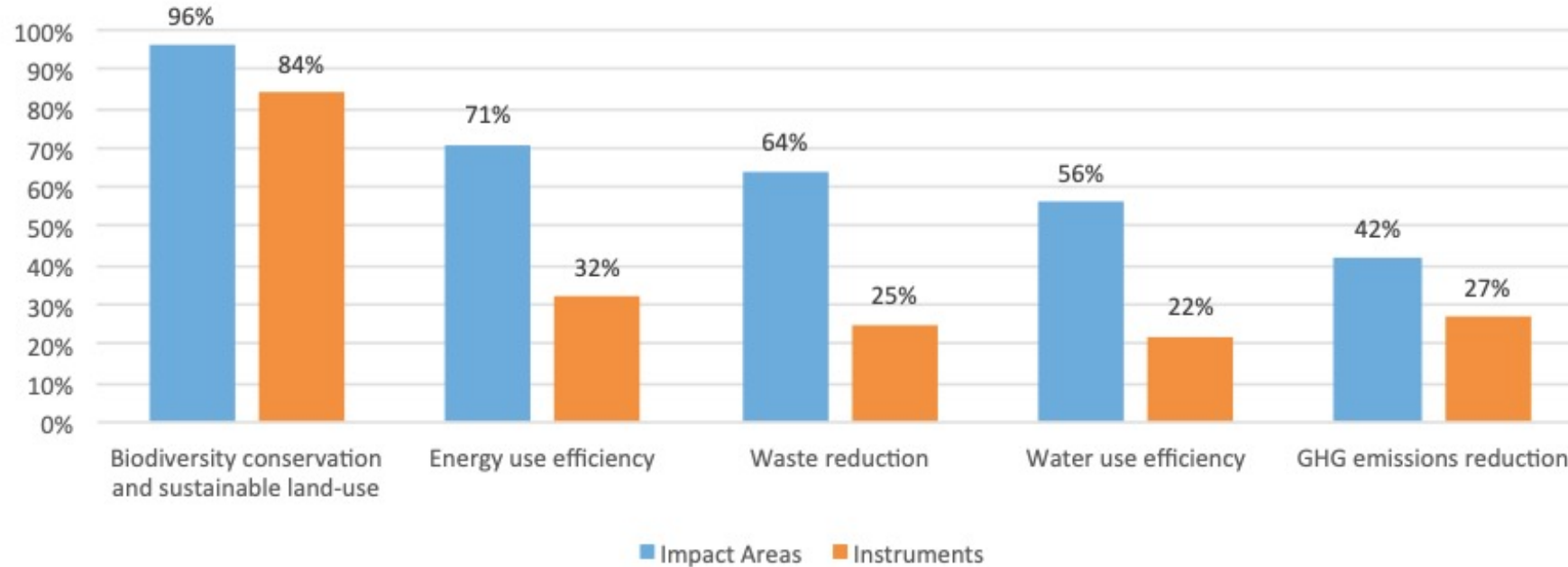


<https://www.unwto.org/address>



Baseline Report on the Integration of Sustainable Consumption and Production Patterns into Tourism Policies

Figure 3.8. Policy instruments addressing "SCP impact areas" in the reviewed national tourism policies



World Tourism Organization and United Nations Environment Programme (2019)

Sustainable Production and Consumption Context

World Tourism Organization
and United Nations
Environment Programme
(2019)

Figure 3.11. Policy instruments addressing "SCP impact areas" by region

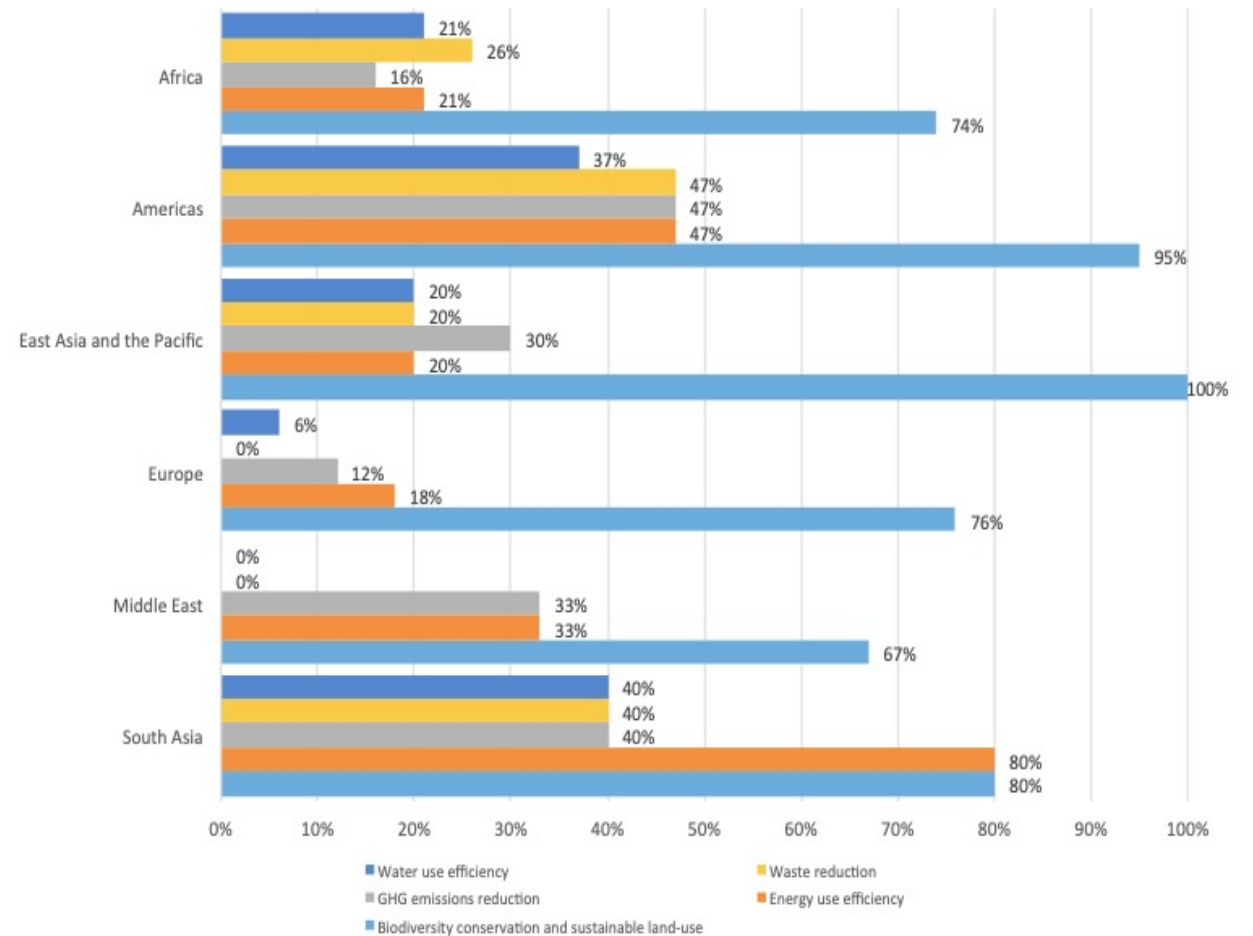
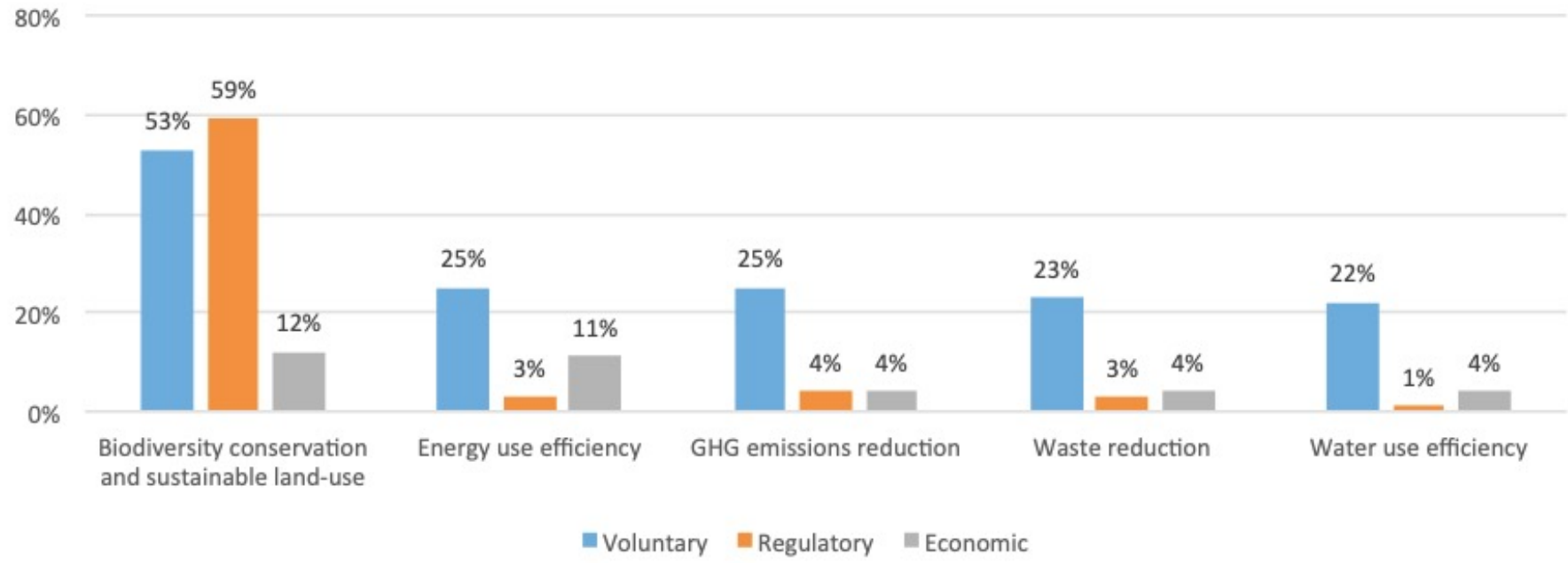


Figure 3.16. Nature of policy instruments by "SCP impact area"



World Tourism Organization and United Nations Environment Programme (2019)



Context

Demand



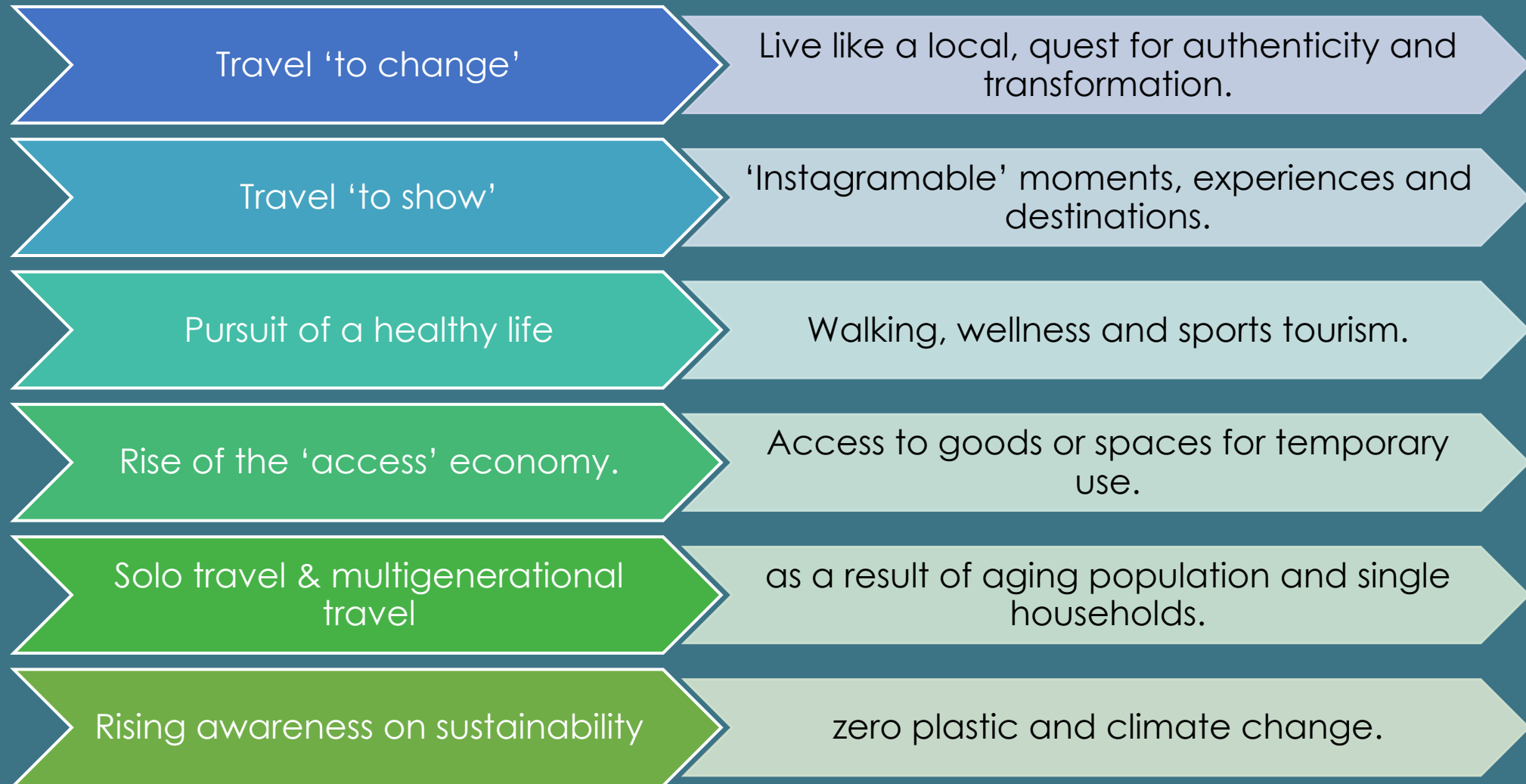
UNWTO

World Tourism Organization

International Tourism Highlights

2019 Edition

Consumer travel trends



UNWTO, 2019



Context

Islands

Challenges

- ✓ Weak integration with national communications and electricity networks
- ✓ Narrow production base and seasonal economies/populations
- ✓ Small number of export markets and import suppliers
- ✓ Geographic isolation and higher transport costs
- ✓ Vulnerability to climate change and natural hazards
- ✓ Insufficient policies to promote development in the Islands and improve their competitiveness.
- ✓ Little cross-sector, cross-jurisdictional and intergovernmental coordination
- ✓ Limited financial resources
- ✓ Complex commercial logistics
- ✓ High dependence on imported fossil fuel, energy
- ✓ Low protection of the island environment and biodiversity
- ✓ Complex land use planning issues
- ✓ Sensitive environmental management issues e.g. waste, water and sanitation
- ✓ Ageing population and 'brain drain'
- ✓ Limited institutional capacity and distance to capitals
- ✓ Diseconomies of scale (higher unit costs for infrastructure and services)
- ✓ High dependence on the quality of government for the definition of investment strategies
- ✓ Inappropriate budgeting, procurement, and regulatory practices for the territory
- ✓ Small size of the economy, population and surface.
- ✓ Low development of marine renewable energies that favours the energy transition.

Sources: CPMR Islands Commission, 2021; CPMR Islands Commission, 2019; OECD, 2018

Challenges

- ✓ Low quality of transport to be efficient, reliable, sustainable and resilient
- ✓ Limited response capacity regarding transportation needs, due to its infrastructure and port equipment
- ✓ High maintenance costs of port infrastructure
- ✓ High vulnerability of approach channels, anchorages and port areas
- ✓ Inappropriate maintenance schedules
- ✓ Low investment in port technologies and equipment
- ✓ Insufficient estimation of the risks that must be covered by insurance.
- ✓ Lack of alliances to define risks
- ✓ Limited financial resources for the insufficient existence of spare parts for the effective handling of containers and, of trained personnel
- ✓ High possibilities of having a diverse tourism offer
- ✓ High quality food production
- ✓ Strong culture for commerce and entrepreneurship
- ✓ High potential for marine renewable energy generation
- ✓ High levels of amenity – coastal and landscape
- ✓ Strong communities and attractiveness
- ✓ High biodiversity and environmental services
- ✓ Unique cultures and histories

Opportunities

- ✓ Having numerous visitors and potential ambassadors of the energy transition to other territories.
- ✓ High probabilities to implement innovative solutions and digital technology to improve the energy transition, reducing CO2 emissions and driving the change towards the circular economy, as they are considered strategic laboratories.
- ✓ Increase employment, growth and competitiveness, based on the generation of marine renewable energy and smart grid systems on the islands of the EU.
- ✓ High potential for the development of port activities, university research, product development, technology transfer, ... etc

Context

Mediterranean Islands

Characteristics

0.2% of the
**world's ocean
volume**

0.7% of the
**world's ocean
surface**

Average depth
1,500 m

Maximum depth
5,267 m

**21 riparian
countries**

**190 islands
populated**
(approx)

10,000 islets
(approx)

**518 Great
submarine
canyons ***

2,274 seamounts

8 Great deltas

Connected to the **Atlantic** by the Strait of Gibraltar, to the **Sea of Marmara** by the Strait of Dardanelles and to the **Red Sea** by the Suez Canal.

Source: Universidad Complutense de Madrid, 2019

* (Harris & Whiteway, 2011)

Characteristics

One of the **25 most biodiverse spots in the world** (Myers et al., 2000)

About 17,000 **marine species**

20% **endemic species**
*

Emblematic species

18.5 million hectares of **wetlands**, mostly coastal.

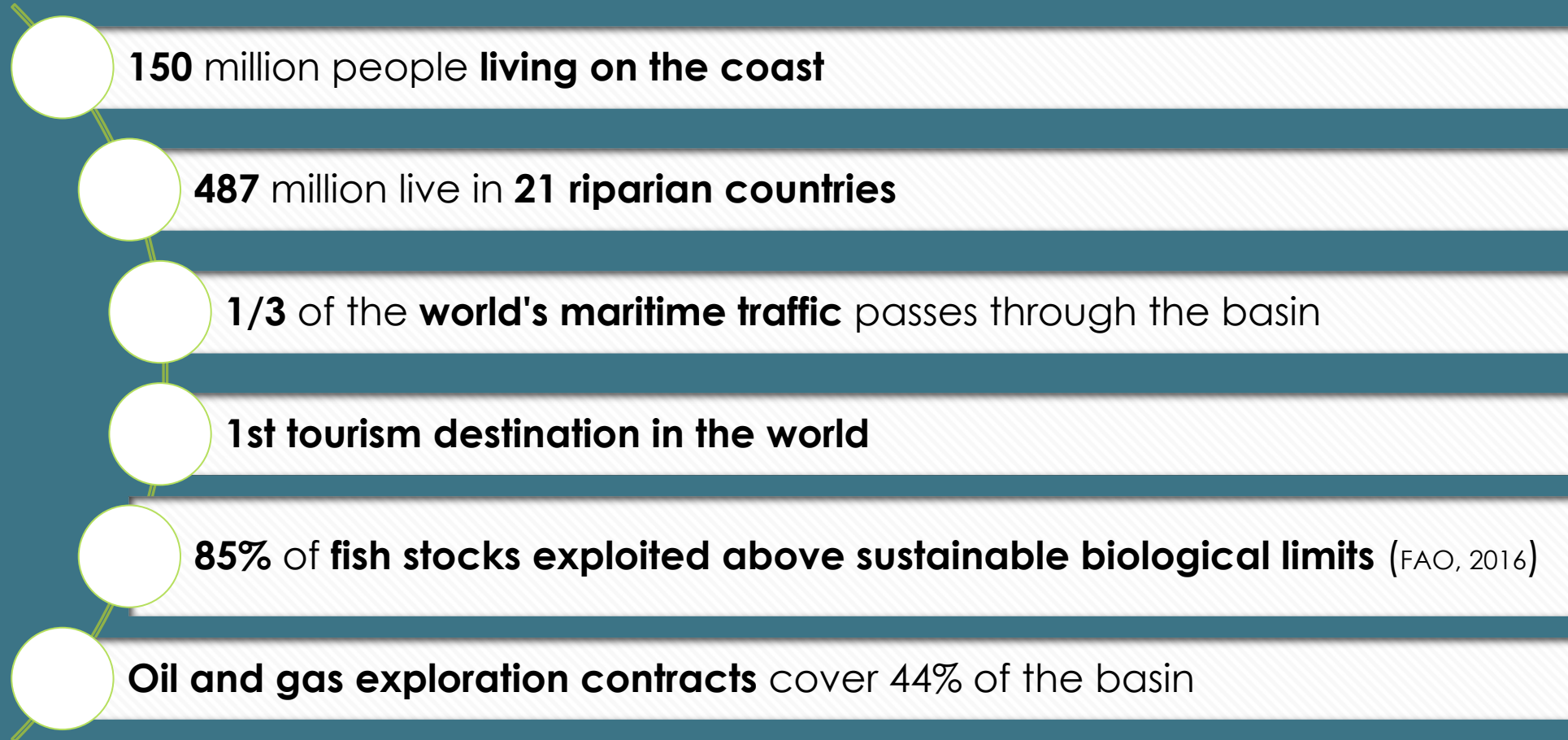
Sources: Universidad Complutense de Madrid, 2019 ; MedPAN & UN Environment - MAP - SPA/RAC, 2017 y Piante & Ody, 2015

Pressure

- 18% of **world crude oil traffic**
- More than **50%** of **the wastewater received is not treated**
- Approximate **rise in sea level** 4 mm / year on average
- Floating plastic** waste and micro-plastics
- 70%** of **marine litter** ends up on the seabed
- Greater acidification** than in the oceans
- Ghost fishing** practices

Sources: Universidad Complutense de Madrid, 2019 ; MedPAN & UN Environment - MAP - SPA/RAC, 2017 y Piante & Ody, 2015

Pressure



Sources: Universidad Complutense de Madrid, 2019 ; MedPAN & UN Environment - MAP - SPA/RAC, 2017 y Piante & Ody, 2015

Challenges

Political and security instability due to regional conflicts: **Libya and North Africa**

Displacement and migration, generated by regional **conflicts: Syria, Yemen and Iraq**

It is necessary to strengthen **dialogue and cooperation** among the countries of the Mediterranean

Gaps in the **National Security Policy** caused by regional **conflicts: Arab - Israel**

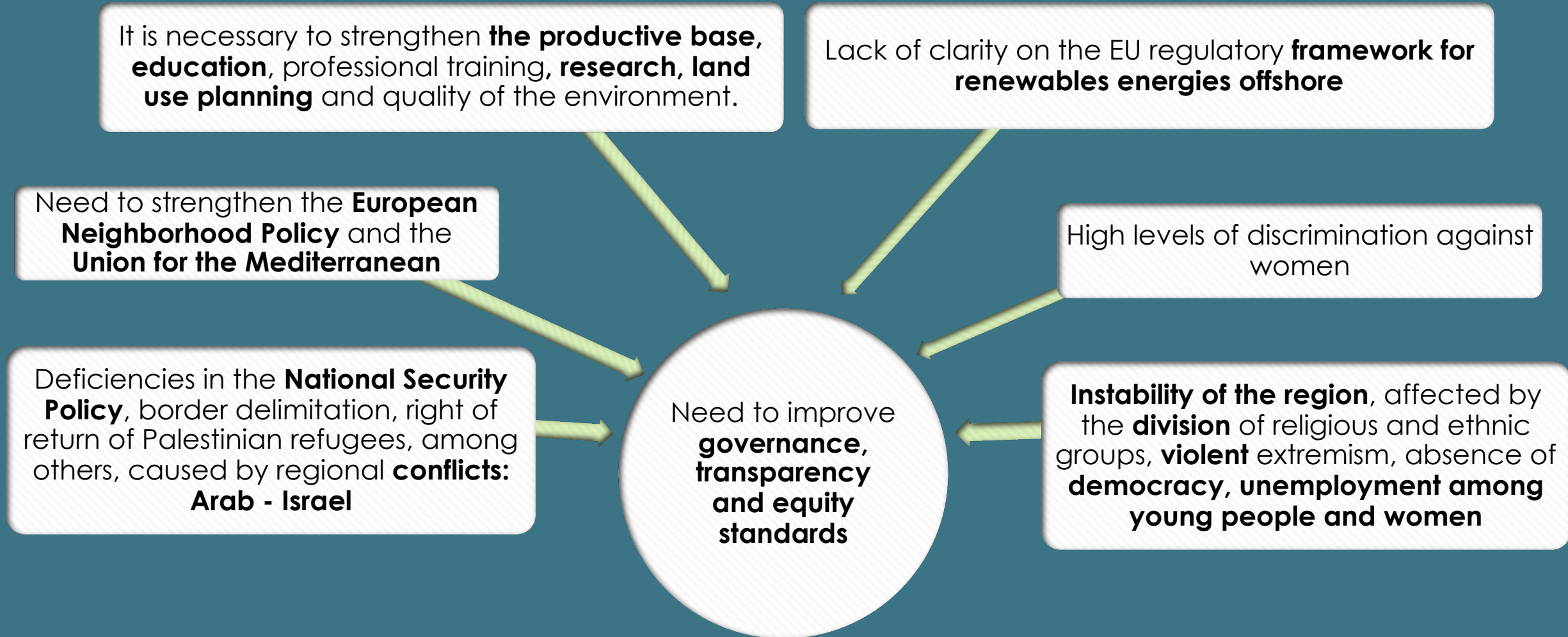
Increase in security problems, derived from **global and regional powers: EU, US, Russia, Iran and the Gulf**

Insufficient actions that account for the **understanding of cross-border dynamics: South (EU) - North (Africa) and South - South**

Insecurity and the need to strengthen governance

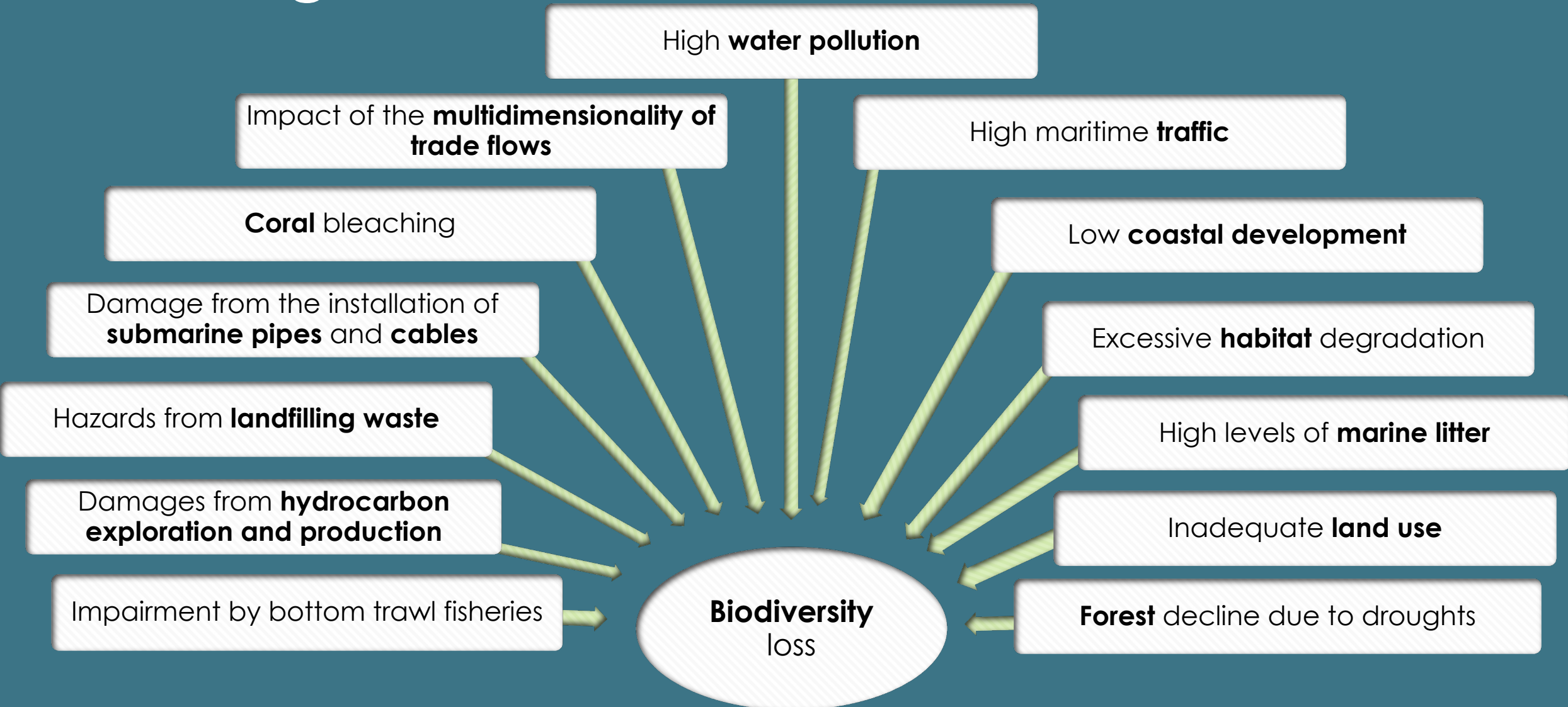
Sources: CPMR Islands Commission, 2021; CPMR Islands Commission, 2019; IEMed, 2019

Challenges



Sources: CPMR Islands Commission, 2021; EUROPEAN COMMISSION, 2020; CPMR Islands Commission, 2019; Fouchier, 2015

Challenges



Sources: CPMR Islands Commission, 2021; EUROPEAN COMMISSION, 2020; Universidad Complutense de Madrid, 2019; CPMR Islands Commission, 2019; Doblas Miranda, y otros, 2015

Vision

Mediterranean island destinations is serviced and managed to be internationally recognized as a preferred all year-round destination for ancient culture and folklore, fine cuisine and exciting outdoor activities by discerning responsible visitors.

Mediterranean island destinations work regionally integrated with a growing resilience and ownership of tourism to continue to be amazing places to live and visit for generations to come.

Mission

Leading sustainable tourism development in a collaborative integrated manner, fostering dialogue, ownership, growth, innovation, and action, helping the destination be as liveable as now for generations to come.

Core Across Values



Gender Equality



Sustainable



Inclusive



Safe

These values are present in everything we do in the Mediterranean Island destinations.



High Quality



Competitive



Digital

Overarching goals





But we are one



One Mediterranean Sea





Overarching goals

- JOINT DEVELOPMENT OF SUSTAINABLE YEAR – ROUND TOURISM ACROSS THE MEDITERRANEAN
- REGIONAL COHESION AND INTEGRATION
- OWNERSHIP

Interreg 
Mediterranean



WINTER MED

JOINT
DEVELOPMENT OF
SUSTAINABLE YEAR-
ROUND TOURISM



REGIONAL COHESION AND INTEGRATION

Interreg  EUROPEAN UNION
Mediterranean
 **WINTER MED**

	FMS	Ill	JBIMS	
Altisource	0%	0%	0%	
American Express	7%	6%	0%	5%
Aventus Capital	1%	1%	0%	0%
Axis Bank	4%	4%	5%	2%
Bank of America	4%	2%	1%	7%
Barclays	6%	2%	1%	1%
BNP Paribas	2%	2%	1%	0%
Citi bank	9%	9%	1%	1%
Credit Suisse	3%	1%	3%	0%
Deutsche	6%	5%	4%	8%
DP	2%	1%	1%	0%
Ed	2%	1%	1%	1%
Gold	3%	1%	2%	2%
	6%	8%	2%	4%
	8%	8%	6%	4%
	0%	1%	0%	0%
	5%	8%	6%	1%
	3%	5%	4%	6%
	2%	2%	1%	2%
	4%	2%	1%	1%



OWNERSHIP

Overarching goals

Joint Development of Sustainable Year-Round Tourism

Current situation:
disconnected destinations
One Mediterranean, many
diverse aims

Strategic Axis



Vision

Desired situation:
connected destinations
One Mediterranean, one
sustainable aim



Interreg 
Mediterranean

 **WINTER MED**

STRATEGIC AXIS & INSTRUMENTAL AXIS



STRATEGIC AXIS Objectives

STRATEGIC AXIS - GOVERNANCE

Objectives

Establishing an agile and effective governance system that allows managing the relevant problems of the tourism sector, facilitating management and cooperation with key actors from the public and private sectors.

Favoring that the legal framework responds & facilitates the sustainable joint development of companies, human capital, innovation, environmental management, knowledge management favoring effective decision-making in the Mediterranean, as a sustainable tourism destination.

Objectives' guidelines

Alignment with SDGs...

Criteria to be taken into account for programmes, projects, actions to achieve the goal.

- Actions need to be defined, implemented, communicated with **transparency**
- Actions need to help **building trust** among the countries and islands therein to foster further collaboration
- Committee/Commission /Grouping **members need to be chosen for their roles** and not the entity they belong to
- Meetings need to be **agile**
- Actions need to have **clear purposes, timeline, budget and people responsible of their execution**
- **Broad consensus** needs to be sought after
- Involving **experts** when the topics are unknown, or knowledge gaps appear
- Being **universally inclusive** all through the process

THIS IS A MERE EXAMPLE OF THE
CONTENT THAT IS YET TO COME
FOR EACH AXIS

Indicators

Calendar

INSTRUMENTAL AXIS Objectives

Alignment with regulations, directives and SDG 2030

UN Sustainable Development Goals 2030



EU regulation relevant to marine conservation

Convention on the Conservation of European Wildlife and Natural Habitats (Bern Convention)

Natura 2000 Network and Community Directives on Birds (2009/147/EEC) and Habitats (92/43/EEC).

Marine Strategy Framework Directive (MSFD) (2008/56/EC)

Marine Strategy Framework Directive (MSFD) (2008/56/CE)

Water Framework Directive (2000/60/EC)

Maritime Spatial Planning Framework Directive (2014/89/EU).

EU Biodiversity Strategy 2020

More directives, guidelines and regulations this strategy is aligned with

- Europe 2020 Strategy
- COM (2010)352 Europe, world's N°1 tourist destination
- COM (2012) 494 - Blue Growth
- COM (2014) 86 – European Strategy for more Growth and Jobs in M&C Tourism
- ESIF ROPs / NOPs 2021-2028
- EU Directive on MSP/Protocol to the Barcelona Convention on ICZM
- EUSAIR 4th pillar: diversification of the tourism offer and the responsible and sustainable tourism management
- COM(2021) IP/21/2341 European Green Deal: Developing a sustainable blue economy in the European Union

Indicators

Calendar

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