

TRANSNATIONAL YEAR-ROUND TOURISM STRATEGY FOR MEDITERRANEAN ISLAND DESTINATIONS 2021 – 2026



Project co-financed by the European
Regional Development Fund



Interreg Mediterranean



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Regional Development Fund



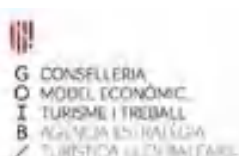
WINTER MED

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
the region

WINTER MED promotes
the transition from the 3S
(Sea-Sun-Sand) tourism of
insular tourism
destinations during the
summer to alternative,
sustainable, 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



CILETTIVITÀ DI CORSICA
 COLLECTIVITÀ DI CORSE

Agence di u Turismu di Corsica
 Agence du Tourisme de la Corse



Institut za poljoprivredu i turizam Poreč



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DUBROVNIK-NERETVA REGIONAL DEVELOPMENT AGENCY



G CONSELLERIA
 O MODEL ECONÒMIC,
 I TURISME I TREBALL
 B AGENCIA ESTRATÈGIA
 TURÍSTICA ILLES BALEARS



LARNACA & FAMAGUSTA DISTRICTS DEVELOPMENT AGENCY

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Tuscany, September 2021



The present document is one of the outputs of the
Interreg Mediterranean WINTER MED project.



Project co-financed by the European
Regional Development Fund

Table of contents

[Context](#)

[Strategy](#)

[Vision](#) – [Mission](#) – [Values](#)

[Overarching goals](#)

[Strategic axes](#)

[Instrumental axes](#)

[Alignment with SDG 2030 and EU
regulations and directives](#)

[Calendar and priorities](#)

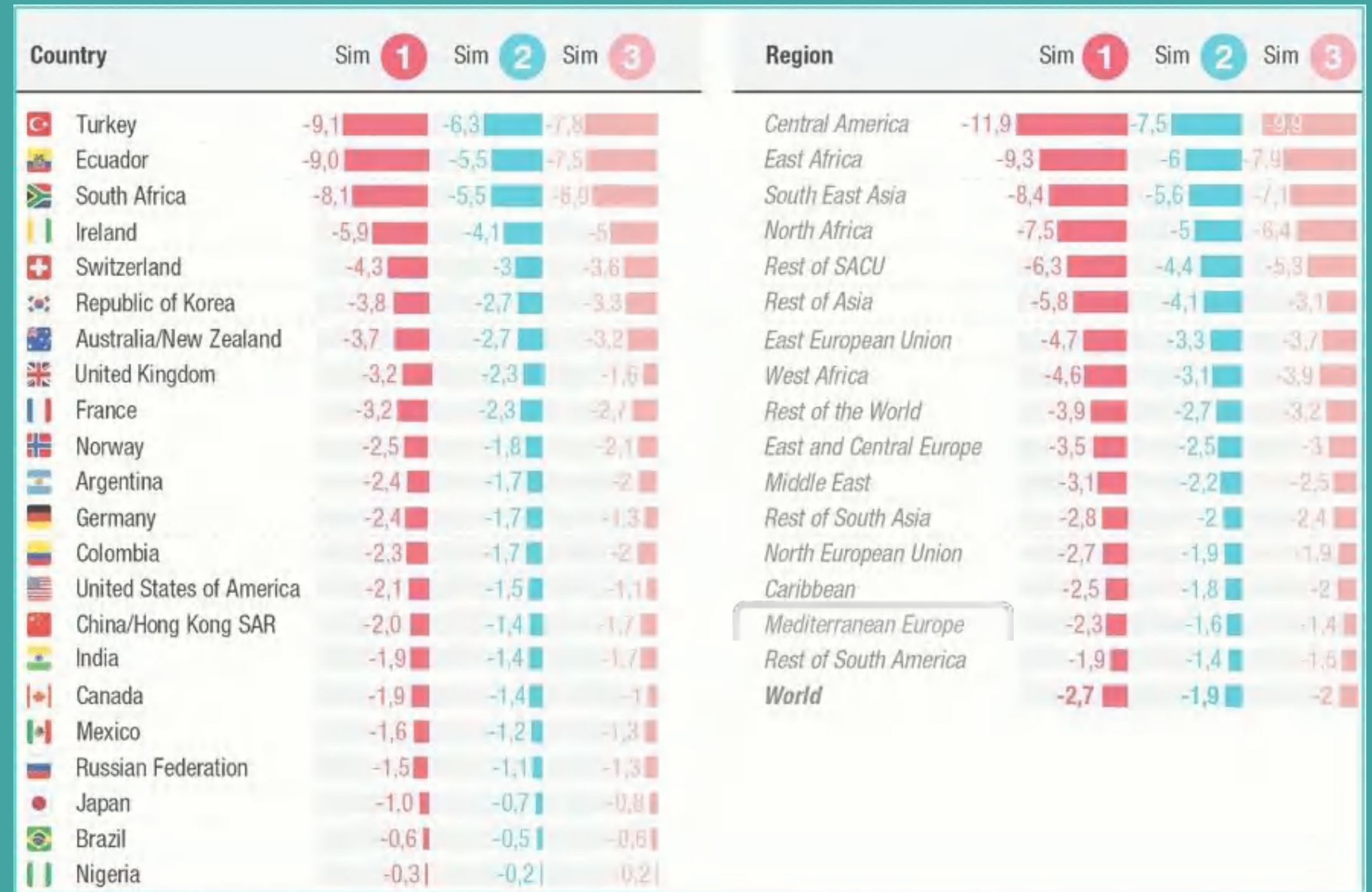
CONTEXT



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CONTEXT

COVID-19 IMPACT IN TOURISM



Source: UNWTO AND UNCTAD (2021)

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.



The present strategy needs to be seen from the lense of the COVID-19 tourism impacted reality.

CONTEXT

COVID-19 IMPACT IN TOURISM

LOCK DOWN PERIOD

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

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 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 endangering profitability
- Final closures of businesses

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?
- Severe 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

LIVING WITH COVID-19 DESEASE

- Uncertainty regarding the duration of antibodies, new strains of the virus and the capacity of vaccines to protect the population
- Demand response to this uncertainty regarding their intent to travel during winter-spring
- The shift towards home-office and its impact on the reduction, perhaps permanent, of business trips and face-to-face events
- Demand shifts: changes in demand: in travel patterns, destination preferences, type of accommodation, type of activities to develop...
- Supply side impacts: not all the value chain might adapt
- Policy response to tourism shifts and climate change towards more sustainability and inclusiveness

CONTEXT

CLIMATE CHANGE



Climate change and its impacts:

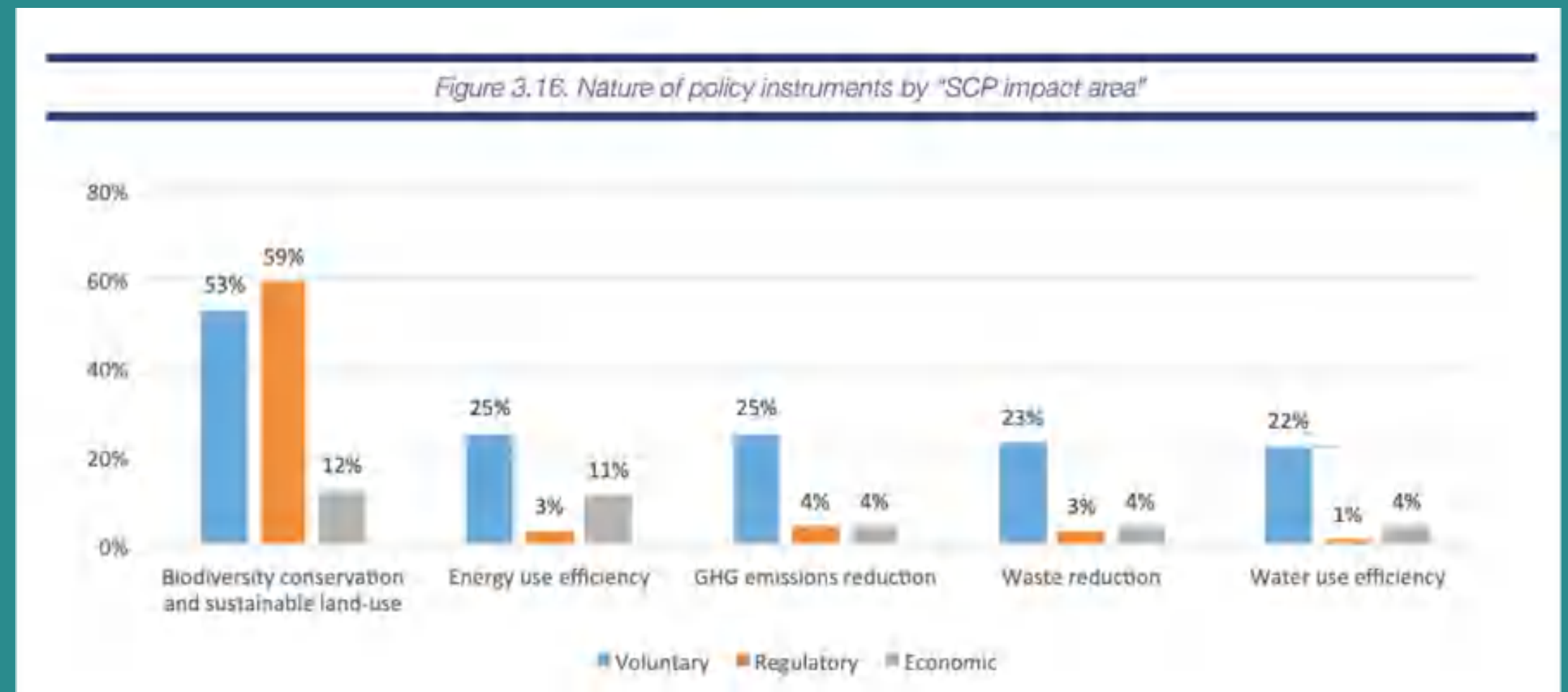
- Sea level rise, making human settlements and tourism facilities highly vulnerable
- Increasing hurricane intensity and possibly frequency, with its impact on significant damages, losses, rising insurance costs or event losing the possibility of insurability, business disruption, evacuation costs, rebuilding costs, impact on the image – brand of the destination.
- Temperature changes, warmer winters and summers.
- Increasing sea surface temperatures affecting marine species' metabolism, distribution and phenology
- Changing precipitation patterns, hence reduced water supply and potential for drought
- Saltwater intrusion into freshwater aquifers

directly affect tourism destinations and their survival, hence this strategy looks at building resilience.

CONTEXT

More needs to be done towards circular tourism

All countries are advancing towards Sustainable Consumption and Production. However, most of the efforts are concentrated on voluntary policy instruments. There is room for improvement on regulatory and economic instruments to foster further advancements.



CONTEXT

International Demand Trends

UNWTO in this publication presents international consumer travel trends relevant when developing products and its communication. When sustainability is the focus, the buyers persona under "travel to change" are particularly important to deepen into.



Source: UNWTO (2020)

European Green Deal

The European Commission proposes transformation of EU economy and society to meet climate ambitions. On 14 July 2021, the European Commission 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. Achieving these emission reductions in the next decade is crucial to Europe becoming the world's first climate-neutral continent by 2050 and making the European Green Deal a reality. Tourism as an economic sector cannot be a stranger to this, must heavily contribute to a greener Europe, a greener Mediterranean.

The benefits of the European Green Deal

- Fresh air, clean water, healthy soil and biodiversity
- Renovated, energy efficient buildings
- Healthy and affordable food
- More public transport
- Cleaner energy and cutting-edge clean technological innovation
- Longer lasting products that can be repaired, recycled and re-used
- Future-proof jobs and skills training for the transition
- Globally competitive and resilient industry

Tourism needs to contribute significantly.

Sustainable Blue Economy

Blue Growth is the European Commission Strategy for the recovery of the economy in Europe, encouraging the investment and technological innovation in those areas related to the Maritime Economy, or Blue Economy, identifying key factors and actions to promote the employment and the economic growth in a sustainable way

The Blue Growth call is part of the Food security, sustainable agriculture and forestry, marine and maritime and inland water research and the bioeconomy societal challenge.

A new approach for a sustainable blue economy in the EU - Transforming the EU's Blue Economy for a Sustainable Future

- Achieving the objectives of climate neutrality and zero pollution
- Circular economy and preventing waste
- Biodiversity and investing in nature
- Coastal resilience
- Responsible food systems
- Ocean knowledge
- Research and innovation
- Investment
- Blue skills and jobs
- Maritime spatial planning
- Citizen engagement and ocean literacy
- Sea basins, regional cooperation and support for coastal regions
- Maritime security
- Promoting a sustainable blue economy abroad

MARITIME TOURISM IS ONE OF THE KEY SECTORS OF THE BLUE GROWTH STRATEGY. HENCE, TOURISM HAS A SIGNIFICANT RESPONSIBILITY TO ACT ACCORDINGLY.

Relevance of the Mediterranean as a tourism destination

The Mediterranean generates almost a quarter of the world tourism receipts.

It is the number one destination.

It received one in three international tourists worldwide.

Receipts amount for 12% of total exports.



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

About 17,000
marine
species

20% endemic
species

Emblematic
species

18.5 million
hectares of
wetlands

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

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.

CONTEXT

Mediterranean Islands' Pressures

1st tourism destination in the world

Floating plastic waste and micro-plastics

85% of fish stocks exploited above sustainable biological limits



150 million people living on the coast

487 million live in 21 riparian countries

1/3 of the world's maritime traffic passes through the basin



Oil and gas exploration contracts cover 44% of the basin

18% of world crude oil traffic

More than 50% of the wastewater received is not treated



Ghost fishing practices

Greater acidification than in the oceans

70% of marine litter ends up on the seabed



Approximate rise in sea level 4 mm / year on average

Increasing insecurity and instability

MEDITERRANEAN 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 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 favors the energy transition.
 - Low quality of transport to be efficient, reliable, sustainable and resilient
 - Limited response capacity regarding transportation needs, due to its infrastructure and port equipment

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

MEDITERRANEAN ISLANDS' CHALLENGES

Damage from the installation of submarine pipes and cables

Hazards from landfilling waste

Impact of the multidimensionality of trade flows

Damages from hydrocarbon exploration and production

Impairment by bottom trawl fisheries

**Biodiversity
Loss**

Low coastal development

Excessive habitat degradation

High levels of marine litter

High water pollution

Forest decline due to droughts

Inadequate land use

High maritime traffic

Coral bleaching

ISLANDS' OPPORTUNITIES

- 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
- Having numerous visitors and potential laboratories 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
- High levels of amenity – coastal and landscape
- Strong communities and attractiveness
- High biodiversity and environmental services
- Unique cultures and histories

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

Transnational Year-Round Tourism Strategy for Mediterranean Island Destinations



Vision



Mission



7 Values



3 Overarching Goals



6 Strategic Axes



5 Instrumental Axes

VISION MISSION VALUES

VISION

Mediterranean island destinations are 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 livable as now for generations to come.





Sustainable



Inclusive



Safe



Competitive



Gender Equality



Digital



High Quality

VALUES

These values are present in everything the tourism sector does in the Mediterranean Island destinations.

SUSTAINABLE

- **Social and Environmental Coexistence**
- **Balance and innovative economic development**

Sustainability is a key value to achieve a balance between profitable and competitive development of tourism activity, coexistence with society and protection of the environment, from a holistic governance and a strengthened value chain.

INCLUSIVE

Inclusive supply catering for residents and demand in a inclusive way,. Avoiding discrimination is not enough, embracing diversity makes the destinations inclusive

SAFE

Health wise and security wise our destinations are to be and perceived as safe. Period.

GENDER EQUALITY

When tourism experiences and services are designed, gender needs to be considered. Moreover, within our tourism sector employment gender equality needs to be achieved.





COMPETITIVE

Banish the practice of competing merely on price. Innovation, incremental or radical has to be central to our islands everyday practice, hence we will compete by being different, pivoting on our singular identity, our values, our innovations and practices, a continuous, never-ending process.

DIGITAL

Demand is for the most part digital, supply not yet, we need to get there, sooner rather than later, for the efficiency of our strengthened value chain on its own and for our supply to be and remain competitive.

HIGH QUALITY

Since high quality employment is sought after, high quality service is what needs to be offer. There is no alternative to be sustainable and competitive. High quality is key part to be able to achieve it.

OVERARCHING GOALS

WE ARE ONE MEDITERRANEAN SEA





WE ARE ONE MEDITERRANEAN SEA

Overarching goals

Joint Development of Sustainable Year-Round Tourism

Current situation:
disconnected destinations
One Mediterranean, many
diverse aims



Desired situation:
connected destinations
One Mediterranean, one
sustainable aim

Strategic Axes



- Sustainable
- Inclusive
- Gender Equality
- High Quality
- Competitive
- Digital
- Safe

Values

Innovation
Governance
Connectivity
Biodiversity & Waste mgmt.
Urban Planning and Development
Linkage with other sectors
Regional Cohesion and Integration

Instrumental Axes

- Funding
- Capacity building
- Business Intelligence
- Product Development
- Communication and Marketing

Interreg
Mediterranean



EUROPEAN UNION



WINTER MED



OVERARCHING GOALS

THE OVERARCHING GOALS PRECISELY AIM TO CONTRIBUTE TO THE TRANSNATIONAL PERSPECTIVE OF THE PRESENT STRATEGY.

This strategy intends to go from the current situation where the Mediterranean is a collocation of diverse disconnected destinations with different aims. To a new situation where the Mediterranean island destinations work as one.

If certain destinations move to sustainable tourism, raise value created and price, and others do not, if the bar is not raised collectively, transnationally, the unbalance and destruction of the Mediterranean will continue, damaging all destinations.





OVERARCHING GOALS

JOINT DEVELOPMENT OF SUSTAINABLE YEAR – ROUND TOURISM ACROSS THE MEDITERRANEAN

Joint development, collaboration, coordination among the different destinations in the Mediterranean to foster demand flows across the year and supply strengthening to match the desired demand.

REGIONAL COHESION AND INTEGRATION

Regional cohesion and integration to raise the bar, to avoid competition based on price, rather based on sustainable and inclusive commitment and value, on digital skills, innovation and quality.

OWNERSHIP

Mediterranean islands' citizens to acknowledge tourism being developed on an inclusive basis. Transnational frameworks are in place to facilitate the skills development and capital investment necessary for nationally-owned products, giving residents the opportunity to take advantage of tourism opportunities, and driving national ownership across the Mediterranean.

STRATEGIC AXES



STRATEGIC AXES

ACHIEVING YEAR-ROUND TOURISM IMPLIES EXECUTING ACTIONS OF THE STRATEGIC AND INSTRUMENTAL AXES

Year-round tourism is critical for the sustainability of Mediterranean island destinations, year-round employment, year-round direct, indirect and induce income, as well as year-round care for social, economic and environmental balance. This is not achieved if the transnational perspective is not implemented. Strategic axes contribute to reinforcing linkages in governance, with other sectors, working biodiversity, waste management, urban planning, and generating enough connectivity and innovation to attract demand all year-round.





GOVERNANCE

INNOVATION

CONNECTIVITY



**BIODIVERSITY AND
WASTE MANAGEMENT**

**URBAN PLANNING AND
DEVELOPMENT**

**LINKAGE WITH OTHER
SECTORS**



Strategic Axes



Strategic Axis: Governance

Objectives

- *Islands and their national governments enunciate the across priority of sustainable tourism development in their respective countries' policies and budgets. These policies and budgets refer to those of tourism and beyond: transport, energy, employment, education, research and development, health, etc.*
- *Take coordinated and evidence-based actions across government and private sector, both internally within the islands/countries and transnationally.*

MEASURES

- 1) Identify key stakeholders and agile communication methods to foster the dialogue, planning and implementation of the transnational strategy.
- 2) Capitalise on the committee created to address the pandemic crisis to establish 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.
- 3) Define and implement an agile and inclusive participatory process to incorporate the different public and private stakeholders within tourism and beyond and the residents.
- 4) Modify / Adapt and implement the legal framework so that it allows for transversal and transnational effective collaboration towards sustainable tourism development.
- 5) Define operative agile plans per island/country to coordinately implement the agreed actions towards sustainable tourism development.



Strategic Axis: Governance (CONTINUED)

Objectives

- *Ensure there is the suitable and sufficient capacity within islands and countries to manage sustainable development of tourism.*
- *Implement actions that demonstrate the commitment to sustainable, inclusive, digital, high quality, innovative and gender balanced tourism.*

MEASURES

6) Implement knowledge management systems and good practices to foster that key information flows and its acted upon.

ENTITY IN CHARGE

Islands'/Countries' Government

CALENDAR

2021-2026

PRIORITY

HIGH

INDICATORS

- 1) Number of stakeholders and resident representatives participating in the process and/or committee
- 2) Number of transnational actions accomplished
- 3) Positive feedback rate of public, private tourism stakeholders and residents with the transnational actions accomplished
- 4) Positive feedback rate of public, private tourism stakeholders and residents with the transnational and island/country participatory and decision-making process



Strategic Axis: Innovation

Objectives

- *Strengthen the value chain of the islands and countries innovation systems.*
- **Tourism to be included within the islands and countries innovation systems as the cross-cutting sector it is.**
- **Innovation implemented across the islands encompassing different areas to foster sustainable, inclusive, digital, high quality and gender balanced tourism.**

MEASURES

- 1) Formulate clear and effective projects to achieve technical achievements aligned with the needs of the desired market and the transnational tourism strategy to foster year-round sustainable tourism.
- 2) Ensure continuous funding, research, capacity building and transnational cooperation to share and jointly develop technical and technological capacities within the islands and nations.
- 3) Formulate and implement policies that benefit and encourage the actions of companies, the achievement of resources and the consolidation of programs of: business strengthening, technological development, access to sources of financing and development of products that position the territory as a destination for sustainable tourism.
- 4) Monitor the implementation of innovation, by whom it is implemented, further capacities needed, residents, demand and supply needs and results obtained.



Strategic Axis: Innovation (CONTINUED)

ENTITY IN CHARGE

Islands/Countries' Governments

CALENDAR

2022-2026

PRIORITY

MEDIUM

INDICATORS

- 1) Number of projects implemented
- 2) Volume of funds obtained
- 3) Number of companies benefiting from the innovative projects
- 4) Positive feedback rate by public, private and resident stakeholders on the innovation projects impacts



Strategic Axis: Connectivity

Objectives

- ***Implement long-lasting and environmentally sustainable means of transportation both for residents, visitors and goods, so that year-round tourism is feasible.***
- ***Achieve effective energy efficient carbon neutral insular transport connections, within the islands, between islands and between the markets of origin and the islands, which makes sustainable tourism viable and facilitates the quality of life and development of the host community.***

MEASURES

- 1) Train stakeholders on block negotiation capabilities, which would ensure the development of land, sea and air transport and reduce greenhouse gas emissions and the carbon footprint, considering both human, intellectual, economic resources and environmental ones.
- 2) Implement transnational block negotiations with carriers to widen the bargaining power.
- 3) Implementing information and communication technologies (ICTs) to all means of transportation, jointly with communication campaigns so that all through seniors to young populations can benefit from these ICTs when travelling within the islands, between the islands and beyond.
- 4) Invest in optimal infrastructure and maintenance for higher safety taking into consideration gender, universal access (disabilities, seniors, injuries, pregnancy...), energy efficiency and reduction of greenhouse gas emissions.



Strategic Axis: Connectivity (CONTINUED)

ENTITY IN CHARGE

Islands/Countries' Government

CALENDAR

2021-2022

PRIORITY

HIGH

INDICATORS

- 1) Number of achievements as a result of block negotiations
- 2) Feedback rate by users of ICT solutions implemented on their experience
- 3) % of increase in connectivity by means of transportation during the off-season periods year over year
- 4) % of energy reduction
- 5) % of emission reduction
- 6) % of increase in connectivity by more sustainable means of transportation
- 7) % of increase on safety perception by female travellers (residents and visitors)



**Strategic Axis:
Biodiversity and Waste
Management**

Objectives

- *Implement a coordinated management system for: waste, energy and water, as well as the protection, conservation and promotion of biodiversity.*
- *Reduce the generation of waste and implement transnational circular practices.*
- *Reduce the need to import energy and water, reducing its consumption increasing its sustainable production.*
- *Restore degraded ecosystems*

MEASURES

- 1) Official recognition and effective protection and conservation of remaining areas of natural integrity, both terrestrial and marine.
- 2) Monitoring of threatened species and other activities necessary to determine whether the carrying capacity of specific sites or destinations has been exceeded.
- 3) Raise awareness about sustainable production of energy, circular practices and reduction of water and energy consumption among the potential demand, current demand, tourism supply, intermediaries and host community.
- 4) Implement effective measures to change behaviour in residents and tourism businesses: access control limitation, fees, fines, subsidies subject to demonstrating certain prior actions, etc.
- 5) Moving residents and businesses further from the coast, modifying infrastructures to be resilient and less exposed.



**Strategic Axis:
Biodiversity and Waste
Management (CONTINUED)**

Objectives

- *Implement research and effective measures to address current climate change impacts and to anticipate further impacts.*
- *Ensure tourism and its representatives are participating across the decision-making process concerning environmental issues at all levels.*

ENTITY IN CHARGE

Islands'/Countries' Government in collaboration with each Island's Tourism Authority

CALENDAR

2021-2026

PRIORITY

HIGH

INDICATORS

- 1) Number of areas with higher special protection implemented
- 2) Number of sites for which carrying capacity has been measured and actions have been implemented as a result of the measuring
- 3) Number of fines issued to residents, businesses, authorities year over year
- 4) Number of projects implemented to increase resilience towards climate change or to prevent disasters



Strategic Axis: Urban Planning

Objectives

- *Consider tourism companies, residents and visitors and their needs when urban planning and development occurs.*
- **Consider the desired inclusive and sustainable flows when urban planning and development occurs.**
- **Design a scheme of urban development actions on the islands, which allows the connection of urban and territorial planning and processes, taking into account the environmental situation, its ecosystem, the territory as a whole, its unique cultural, environmental and urban conditions.**

MEASURES

- 1) Cross-cutting committees are created in the urban planning reflections including tourism authorities, tourism businesses, residents' representatives and experts.
- 2) Define and implement joint pilot projects to test methodologies.
- 3) Involve residents and businesses in the process of the planning, testing and project development.
- 4) Implement revisited laws and regulations so that conservation in balance with sustainable development occurs.

ENTITY IN CHARGE

Each island's (or country) authority embarking on urban planning

CALENDAR

2022-2025

PRIORITY

MEDIUM



Strategic Axis: Urban Planning (CONTINUED)

Objectives

- *Revisit laws and regulations for them to be functional allowing the transformation towards sustainable tourism.*

INDICATORS

- 1) Number of regulations modified towards sustainable development
- 2) Number of fines issued to sustainable urban planning offenders
- 3) Number of projects implemented
- 4) Feedback rate by residents, tourism businesses, tourism authorities on their participation and whether their needs/proposals have been taken into account



Strategic Axis: Linkage with other sectors

Objectives

- *Strengthen the economic fabric of the islands by further linking tourism with primary, secondary and tertiary sectors.*
- *Join forces to develop new products, new events, to research and innovate, to raise awareness about sustainable and inclusive consumption and circularity.*
- *Grow year-round employment.*
- *Ensure that communities meaningfully benefit from linkages to tourism.*

MEASURES

- 1) Conduct continuous comprehensive research to determine opportunities to strengthen inter-sectoral linkages within the islands and transnationally.
- 2) Establish an institutional framework, committees, funds and calendar of meetings among public-public and public – private stakeholders of different economic sectors to foster identification and implementation of the linkages.
- 3) Identify and develop niche markets interested on hybrid services (health tourism, agro-tourism, etc.), and strengthen the supply side that offers these.

ENTITY IN CHARGE

Each Island's Tourism Authority

CALENDAR

2021-2023

PRIORITY

HIGH

INDICATORS

- 1) Number of outputs (products, services, regulations, etc.) as a result of the implementation of linkages
- 2) Residents' perception of benefits
- 3) Number of permanent jobs

INSTRUMENTAL AXES



INSTRUMENTAL AXES

ACHIEVING YEAR-ROUND TOURISM IMPLIES EXECUTING ACTIONS OF THE STRATEGIC AND INSTRUMENTAL AXES

Instrumental axes aim to provoke transnational change in the structural issues: funding, capacity building and business intelligence. Moreover, for year-round tourism to actually happen, apart from the strategic axes, product development, communication and marketing are critical.





FUNDING

CAPACITY BUILDING

**BUSINESS
INTELLIGENCE**



**PRODUCT
DEVELOPMENT**

**COMMUNICATION AND
MARKETING**



Instrumental Axes



Instrumental Axis: Funding

Objectives

Design and implement joint financing formulas that:

- *facilitate all the strategic axis*
- *promote the development of products, brands, attraction and maintenance of specialized and key human capital in the value chain*
- *facilitate resources for working capital, start-up, fixed and operating costs in companies to the different stages of their life cycle*

MEASURES

- 1) Implement regulations so that access to funds by public and private entities needs to be subject to providing evidence of sustainable, inclusive, digital, high quality, innovative, gender balanced practices.
- 2) Reach agreements among countries to fund joint projects
- 3) Seek funding among multilateral entities and European/international calls for projects.
- 4) Use innovative means to achieve sponsorship of conservation areas, projects, etc.
- 5) Provide further training to civil servants and tourism businesses on how to access to EU funding and private funding.

ENTITY IN CHARGE

Each Island's Tourism Authority

CALENDAR

2021-2026

PRIORITY

HIGH



Instrumental Axis: Funding (CONTINUED)

Objectives

Implement joint actions to:

- *find resources, national and international investors and develop their own smart capital mechanisms that allow resources to circulate*
- *manage resources in a way that the economy becomes more dynamic and promotes creation, development, growth, staging and consolidation of the business fabric until it becomes a competitive advantage of the territory by making high-impact sustainable tourism projects possible.*

INDICATORS

- 1) Number of entities that access the funds since they qualify to the sustainable prerequisites
- 2) % increase in funds achieved and for what
- 3) Number of civil servants and private sector businesses trained



Instrumental Axis: Capacity Building

Objectives

- ***Formulate and implement a joint plan for the professional development of talent in the tourism sector, as a capacity-building strategy that enhances its value chain, from the tactical and strategic spheres.***
- ***Create and Reinforce a transnational ecosystem fostering R&D&i, exchange of knowledge, finding synergies, best practices***

MEASURES

- 1) Conduct market research to identify and characterize the target audience needs (civil servants, DMOs, tourism businesses, etc.) and the technical capabilities that are capable of responding to these needs as well as to residents in a balanced and sustainable way.
- 2) Implement capacity building under different formulas, understanding the audience they are intended for and continuously updating the content. It needs to cover mastering: product development, business intelligence, sustainability, inclusiveness, ICTs, ecommerce, circularity, gender balance, quality management, business model and competitiveness.
- 3) Conduct basic and applied research, development and innovation on products, processes, organizational structures and business models.
- 4) Invest on adoption of existing innovations, good practices.



Instrumental Axis: Capacity Building (CONTINUED)

ENTITY IN CHARGE

Each Island's Tourism Authority

CALENDAR

2021-2025

PRIORITY

MEDIUM

INDICATORS

- 1) Number of tourism business, tourism authorities (and other relevant stakeholders) trained per topic year over year
- 2) Number of applied research projects implemented in the island(s)
- 3) Positive feedback rate of final beneficiaries of the projects and capacity building sessions



Instrumental Axis: Business intelligence

Objectives

*Implement and cultivate a transnational
Data Culture within tourism and beyond*

MEASURES

- 1) Stakeholders count with key questions they need response to in order to act. Hence, solutions and technological tools are to be implemented. This must favour decision-making to achieve business objectives, facilitating the identification of areas that require improvements.
- 2) Promote collaboration between key stakeholders, by collecting, organising and analysing data, transforming them into relevant sources of information and knowledge; of easy access, using official statistics, traditional methodologies and Big Data, making possible the automation of processes, having an expanded and concrete vision of the territory, as its weaknesses and opportunities.
- 3) Identify trends and visitor behaviour, which contribute to decision-making based on information derived from the analysis of data that the same territory and the set of territories generate.
- 4) Evaluation of the application of islands' and countries' strategies.



Instrumental Axis: Business intelligence (CONTINUED)

MEASURES

- 5) Measure carrying capacity of sites and destination with overtourism to manage it and those without to anticipate.
- 6) Monitor the implementation of innovation activities, its performance, achievements, good practices and lessons learned to catalyze its economic impact and favour the quality of life of residents and the quality of the visitor's trip in the Mediterranean.

ENTITY IN CHARGE

Each Island's Tourism Authority in collaboration with the tourism business associations

CALENDAR

2021-2025

PRIORITY

MEDIUM

INDICATORS

- 1) Number of companies sharing data regularly
- 2) Number of companies that access data regularly (from destinations observatories and official stats)
- 3) Positive feedback rate from tourism authorities and tourism businesses on data relevance for their strategic decision making
- 4) Number of destinations that have taken up measures after measuring carrying capacity



Instrumental Axis: Product Development

Objectives

- *Develop sustainable, inclusive, high quality, innovative and gender-balanced products for the identified desired year-round sustainable demand.*
- *Responsible visitors recognise the Mediterranean islands for the immersive, sustainable, inclusive, gendered balance, innovative experiences.*

MEASURES

- 1) Promote policies on incentives, taxes, that recognise and catalyse the efforts of actors who highlight the territory in their products. Moreover, those actors whose product / service quality contributes to positioning the territory in the minds of visitors as a sustainable tourism destination, attracting the desired audience.
- 2) Joint creation of R&D units that promote the development of memorable tourism experiences based on the identity of the place, supported by different sources of financing, support programs for microSMEs and prioritisation of strategic projects as a transnational strategy with indicators, resources and timetable for its realisation.
- 3) Implement technology that raises the value of publicly and privately managed tourism resources



Instrumental Axis: Product Development (CONTINUED)

ENTITY IN CHARGE

Each Island's Tourism Authority

CALENDAR

2021, 2023, 2025

PRIORITY

HIGH

INDICATORS

- 1) Difference year over year on the most demanded paying experiences off peak season and peak season
- 2) % Variance on expenditure per day per visitor on tourism activities
- 3) % Variance on ecolabel tourism products / services offered



Instrumental Axis: Communication and Marketing

Objectives

- ***Mediterranean islands positioned in the mind of the desired demand in the shortest time, with the fewest possible resources and risks; achieving the attention, interest, desire and acquisition of tourist products by the visitor***

MEASURES

- 1) Conduct permanent research of the desired visitors' characteristics, travel patterns, interests, etc. that travel off season and during peak season with a responsible attitude.
- 2) Secure adequate alignment with the attributes of the products, definition of: key messages, indicators, as well as evaluation of measurements and definition and implementation of improvements that enhance the capture and loyalty of the target market at different moments of the customer's journey.
- 3) Design and implement communication campaigns for the Mediterranean islands jointly raising the bar concerning sustainable commitment from the supply and the expectations from the demand's behaviour. For instance implementing continuous MedIslands joint campaigns.
- 4) Individual insular communication campaigns need to be in line with the joint one following the principles of the present strategy.



Instrumental Axis: Communication and Marketing (CONTINUED)

Objectives

- **Establish a joint criteria,**
 - articulated with the other axes;
 - for a clear, forceful and effective communication that allows the attraction of the desired markets,
 - supported by new technologies that facilitate access to information on tourist products and the destination;
 - from anywhere in the world,
 - device and key language;
 - energising an economy throughout the year and with high conversion standards of marketing strategies.

MEASURES

5) Implement communication campaigns that invite to be more than a visitor to Mediterranean islands, to contribute to their conservation and enjoyment, to be ambassadors of these islands.

ENTITY IN CHARGE

Each Island's Tourism Authority

CALENDAR

2022-2026

PRIORITY

MEDIUM

INDICATORS

- 1) Campaigns impact results
- 2) Number of visitors having visited the islands within visitor surveys that fit the profile of the desired demand
- 3) Number of tourism businesses that communicate in line with the sustainable aims
- 4) Variation year over year of arrivals and overnights off peak season versus peak season

Alignment with SDG 2030, regulations and directives



UN 2030 AGENDA

17 Sustainable
Development Goals



EU STRATEGIES,
REGULATIONS AND
DIRECTIVES

13 key documents



SUSTAINABLE DEVELOPMENT GOALS



GOAL 1: No Poverty

GOAL 2: Zero Hunger

GOAL 3: Good Health and Well-being

GOAL 4: Quality Education

GOAL 5: Gender Equality

GOAL 6: Clean Water and Sanitation

GOAL 7: Affordable and Clean Energy

GOAL 8: Decent Work and Economic Growth

GOAL 9: Industry, Innovation and Infrastructure

GOAL 10: Reduced Inequality

GOAL 11: Sustainable Cities and Communities

GOAL 12: Responsible Consumption and Production

GOAL 13: Climate Action

GOAL 14: Life Below Water

GOAL 15: Life on Land

GOAL 16: Peace and Justice Strong Institutions

GOAL 17: Partnerships to achieve the Goals

Strategic axes



Alignment with



SDG 2030

Governance



Innovation



Connectivity



**Biodiversity
and waste
management**



**Urban
planning &
development**



**Linkage with
other sectors**



Instrumental axes



Alignment with



Transnational Year-Round Tourism Strategy for
Mediterranean Island Destinations

SDG 2030

Funding



Capacity building



Business intelligence



Product development



Communication and marketing



Strategic axes



Alignment with



EU 2020–2038 Strategy for Sustainable Tourism

Governance

Refocus: governance policy within the Union framework
Strengthen: transition to sustainable, responsible and smart tourism
Rethink: planning the future of the tourism industry

Innovation

Strengthen: transition to sustainable, responsible and smart tourism

Connectivity

Refocus: governance policy within the Union framework
Strengthen: transition to sustainable, responsible and smart tourism

**Biodiversity
and waste
management**

Rethink: planning the future of the tourism industry

**Urban
planning &
development**

Strengthen: transition to sustainable, responsible and smart tourism

**Linkage with
other sectors**

Refocus: governance policy within the Union framework
Strengthen: transition to sustainable, responsible and smart tourism

Instrumental axes



Alignment with



**EU 2020–2038 Strategy
for Sustainable Tourism**

Funding

Rebuild: COVID-19 impact response plans
Strengthen: transition to sustainable, responsible and smart tourism
Rethink: planning the future of the tourism industry

Capacity building

Rethink: planning the future of the tourism industry

Business intelligence

Strengthen: transition to sustainable, responsible and smart tourism

Product development

Strengthen: transition to sustainable, responsible and smart tourism
Rethink: planning the future of the tourism industry

Communication and marketing

Rethink: planning the future of the tourism industry

THE EU DIRECTIVES, GUIDELINES AND REGULATIONS THAT THE TRANSNATIONAL YEAR-ROUND TOURISM STRATEGY FOR MEDITERRANEAN ISLAND DESTINATIONS 2021 – 2026 IS ALIGNED WITH

- **European Parliament resolution of 25 March 2021 on establishing an EU strategy for sustainable tourism (2020/2038(INI))**
https://www.europarl.europa.eu/doceo/document/TA-9-2021-0109_EN.pdf
- **COM(2021) IP/21/2341 European Green Deal: Developing a sustainable blue economy in the European Union**
https://ec.europa.eu/commission/presscorner/detail/en/ip_21_2341
- **COM(2021) 240 - Blue Economy for a Sustainable Future** <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=COM:2021:240:FIN>
- **EU Biodiversity Strategy 2020**
<https://ec.europa.eu/environment/nature/info/pubs/docs/brochures/2020%20Biod%20brochure%20final%20lowres.pdf>
- **EU Directive on MSP/Protocol to the Barcelona Convention on ICZM** <https://ec.europa.eu/environment/iczm/barcelona.htm>
- **EUSAIR 4th pillar: diversification of the tourism offer and the responsible and sustainable tourism management** <https://www.adriatic-ionic.eu/about-eusair/pillars/red-pillar/>
- **COM (2014) 86 – European Strategy for more Growth and Jobs in M&C Tourism** <https://www.eea.europa.eu/policy-documents/a-european-strategy-for-more>
- **Maritime Spatial Planning Framework Directive (2014/89/EU)** <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex%3A32014L0089>
- **COM (2010) 352 Europe, world's N°1 tourist destination** <https://www.eea.europa.eu/policy-documents/european-commission-communication-com-2010>
- **Marine Strategy Framework Directive (MSFD) (2008/56/EC)** <https://www.eea.europa.eu/policy-documents/2008-56-ec>
- **Convention on the Conservation of European Wildlife and Natural Habitats (Bern Convention)** <https://www.eea.europa.eu/policy-documents/convention-on-the-conservation-of>
- **Natura 2000 Network and Community Directives on Birds (2009/147/EEC) and Habitats (92/43/EEC)**
https://ec.europa.eu/environment/nature/legislation/habitatsdirective/index_en.htm
- **Water Framework Directive (2000/60/EC)** https://ec.europa.eu/environment/water/water-framework/index_en.html

Calendar and priorities

Calendar and priorities

Strategic axes

Governance

Innovation

Connectivity

Biodiversity and waste
management

Urban
planning & development

Linkage with other
sectors

Instrumental axes

Funding

Capacity building

Business intelligence

Product development

Communication and
marketing

2021 2022 2023 2024 2025 2026

Priority level

High

Medium

High

High

Medium

High

2021 2022 2023 2024 2025 2026

High

Medium

Medium

High

Medium

Transnational Year-Round Tourism Strategy for Mediterranean Island Destinations



Project co-financed by the European
Regional Development Fund

