

**STAKEHOLDER CONFERENCE:
TOWARDS AN INITIATIVE FOR THE SUSTAINABLE
DEVELOPMENT OF THE BLUE ECONOMY IN THE
WESTERN MEDITERRANEAN**

Barcelona, 2nd of February 2017

Briefing Note – Panel 2C

**An attractive western Mediterranean basin:
Sustainable maritime tourism**



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PANEL 2C: AN ATTRACTIVE WESTERN MEDITERRANEAN BASIN: SUSTAINABLE MARITIME TOURISM

Introduction and framing the discussion of the panel

Objectives of the panel

The western Mediterranean region is a popular tourist destination, in 2012 it recorded over 200 million national and international overnight stays in coastal areas and thus boasts the largest share of total tourist arrivals of the basin.

An essential element in fostering Blue Growth in the western Mediterranean region is the development of a new, integrated, sustainable and innovative tourism offer. This contributes to the sector becoming more competitive at global level.

This panel discusses how such aim could be achieved by building on available assets and opportunities and by enhancing cooperation among public authorities and public-private partnerships, through transnational and interregional partnerships, networks, clusters and integrated strategies. This will improve governance and strengthen the position of operators, like the representatives of SMEs, such as the chambers of commerce.

In particular, actions can aim at creating and promoting sustainable and innovative tourism products and services at cross-border and transnational level around specific themes (like coastal and underwater cultural heritage), developing new thematic routes (including cruise and nautical routes) promoting integration and linkages between coastal and inland attractors, and fostering nautical tourism, including the enhancement of quality standards for marinas.

Introducing the speakers

Co-chairs:

- Mr Michel Durrieu, Head of Tourism Unit, Ministry of Foreign Affairs and International Development (Odyssea 2020), France
- Ms Donatella Soria, Unit for Tourism, Emerging and Creative Industries, Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs, European Commission

Panelists:

- Ms Sandrine Devos, Secretary General, European Boating Industry
- Mr Marco Di Gioia, Director, Governmental Affairs for CLIA Europe (Cruise Lines International Association), Italy
- Ms Raquel Huete Nieves, Secretary General of Tourism, Regional Government of Valence, Spain
- Ms Susana Ibáñez Rosa, Secretary General of Tourism, Regional Government of Andalusia, Spain
- Mr Regis Lopez Lang, Delegate, Europe-Latin America-Caribbean, "Odyssea 2020 Growth and Blue Tourism"
- Mr Roberto Perocchio, President, Italian Association of Marinas (ASSOMARINAS)
- Mr Abdelhamid Terghini, Director, Tourism Development and Preservation of Tourist Property, Ministry of Land Use Planning, Tourism and Handicrafts (MATTA)
- Ms Annalisa Zarattini, Expert, Underwater cultural heritage, Ministry of Cultural Heritage and Activities and Tourism, Italy

Setting the topic of the panel

What is the challenge at stake?

Demand for coastal and maritime activities (like sailing, diving, cruising, etc.) is increasing worldwide. Europe is the leading destination for cruising, boating and water sports enthusiasts. The Mediterranean alone attracts 70% of the world's charter activity and is the number one destination for nautical tourism.

Tourism¹ is in the western Mediterranean region the main sector in terms of turnover, GVA and employment. The region is a traditional and consolidated tourist destination in the region. It records the highest share of total tourist arrivals in the Mediterranean, with over 200 million national and international overnight stays in coastal areas in 2012 (60% of regional values). Coastal tourism generated a turnover close to 150 billion Euros and a GVA of 78 billion Euros, both accounting for almost 60% of regional figures. It provided 1.5 million direct jobs and over 4 million total (direct, indirect and induced) jobs. However, as also highlighted by the European Commission "Strategy for more jobs and growth in coastal and maritime tourism"², coastal destinations face a number of challenges: fragmentation of the sector (mainly composed of SMEs), high seasonality, lack of visibility, of product diversification and innovation, of appropriate skills. Coastal and island destinations are also increasingly exposed to pressures to the marine environment and risks caused by climate change.

Also, in the western Mediterranean region, tourism activities are particularly exposed to global competition and volatility of demand. In an interconnected world, traditional models of 'sun and beach'³ are pressured by the competition of global destinations offering greater value for money, more authentic experiences and/or high-quality services.⁴ As such, they require greater efforts towards the adaptation of local systems in order to manage potential risks in the future, and generate more added value in economic, social and environmental terms (UNPAN 2016)⁵.

What are the persisting problems and gaps identified?

As highlighted in the European Strategy for Coastal and Maritime Tourism and in recent studies⁶, cooperation is essential to foster the attractiveness of tourism destinations, by fostering networks of sustainable operators and assuring greater promotion of sustainable tourism practices, attracting of long-term investments across the region and fostering a coherent regional "brand" and marketing strategy targeting both regional and global visitors.

Moreover, the limited integration between coast and inland attractors, the limited innovation in promoting a diversified tourism offer, like through coastal and underwater cultural heritage, and the slow development of new transnational thematic routes (including cruise and nautical routes) is hindering the development potential of coastal tourism destinations.

The sustainability of nautical tourism requires further support to foster local capacity (Mitomed 2015⁷), including the enhancement of quality standards for marinas and greater attraction of investments in the sector. Sustainable connectivity systems for local transport are also much needed, coupled with new business models allowing local destinations to capture the value generated by the sector, so to anchor

¹ Plan Bleu (2014) Economic and social analysis of the uses of the coastal and marine waters in the Mediterranean, characterization and impacts of the Fisheries, Aquaculture, Tourism and recreational activities, Maritime transport and Offshore extraction of oil and gas sectors, Technical Report, Plan Bleu, Valbonne.

² COM (2014) 86

³ http://ec.europa.eu/maritimeaffairs/documentation/studies/documents/study-maritime-and-coastal-tourism_en.pdf

⁴ <http://climatechange.conferenceseries.com/abstract/2015/climate-change-impacts-on-mediterranean-tourism-destinations>

⁵ <http://unpan1.un.org/intradoc/groups/caimed/documents/caimed/unpan021015.pdf>

⁶ <http://bookshop.europa.eu/en/study-on-specific-challenges-for-a-sustainable-development-of-coastal-and-maritime-tourism-in-europe-pbEA0416261/?CatalogCategoryID=epQKABstV.EAAAEJDZEY4e5L>

⁷ <http://www.medmaritimeprojects.eu/download/ProjectMitomed/Mitomed->

Output/MITOMED_8_SWOT%20ANALYSIS%20OF%20TOURISM%20IN%20THE%20MED%20AREA%20in%20Eu%20programming%20literature.pdf

maritime tourism development more clearly to local assets (i.e. ecosystem and cultural value) and prevent negative environmental externalities.

Although a range of initiatives support the development of tourism across the basin, these often remain with a limited scope (by focusing on specific countries or shores) and are not sufficiently targeted to fostering the cooperation potentials across the whole region. Limited uptake of common quality standards across the two shores, lack of managerial capacity, as well as poor synergies in fostering a common brand across the western Mediterranean, are currently still hindering the huge potentials of the region. These aspects certainly need to be addressed through dedicated actions.

Discussion on potential interventions to be supported by the initiative

Enhancing regional cooperation

- How to enhance cooperation, foster alliances, knowledge and best practice sharing, clusters and networks amongst practitioners (e.g. operators, researchers, investors) in order to ensure greater synergies across the region?

Promoting an innovative and diversified coastal tourism offer and developing transnational thematic routes

- How to promote innovative business models and foster diversification/valorisation of the tourism offer. How to create linkages between the sea-land (particularly the accommodation and food services) with ancillary activities, such as transports, creative industries, coastal and underwater cultural heritage, nautical sports, pesca-tourism and sport-fishing across the region? In which MSP and ICZM may help to reach this goal?
- How to promote transnational tourism routes, itineraries, trails, either physical or virtual, around a specific common theme highlighting common cultural and natural (including underwater) heritage of the region?
- Is there a potential for promoting a common brand and marketing strategy to attract regional and global visitors interested in local cultural and underwater heritage and with a higher spending power?

Fostering the managerial capacity to boost a sustainable coastal and maritime tourism in the region

- How to promote sustainable models for maritime tourism and sustainable cruises across the western Mediterranean, so that local communities could capture the value generated?
- How to foster managerial capacity in the marine tourism sector, including the enhancement of quality standards for marinas and attraction of investments?
- How to promote sustainable connectivity systems for local transport as an enabler for a safer and environmentally sustainable maritime tourism sector development across the region?
- In which way can MSP and ICZM help to reach all these objectives?