

**CONFÉRENCE DES ACTEURS:  
VERS UNE INITIATIVE POUR LE  
DÉVELOPPEMENT DURABLE DE L'ÉCONOMIE BLEUE  
EN MÉDITERRANÉE OCCIDENTALE**

*Barcelone, 2 Février 2017*

**LA NOTE DE SYNTHÈSE - PANEL 2C**

**Un bassin méditerranéen attractif:  
un tourisme maritime durable**



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## PANEL 2C: UN BASSIN MÉDITERRANÉEN ATTRACTIF: UN TOURISME MARITIME DURABLE

### CONTEXTE

Le bassin méditerranéen occidental est une destination touristique populaire. En 2012, cette région a enregistré un nombre total de plus de 200 millions de séjours dans les zones côtières et profite ainsi de la plupart des arrivées touristiques dans le bassin. Un des éléments essentiels afin de favoriser la croissance bleue dans la région méditerranéenne occidentale est de développer une offre touristique nouvelle, intégrée, durable et innovante, ce qui contribuerait à rendre le secteur plus compétitif au niveau global.

### OBJECTIF

Ce panel s'interrogera sur comment un tel but peut être atteint en se reposant sur les actifs et les opportunités disponibles et en renforçant la coopération entre les pouvoirs publics et les partenariats entre le public et le privé, par le biais de partenariats transnationaux et interrégionaux, de réseaux, de clusters et de stratégies intégrées. Cela permettra de renforcer la gouvernance ainsi que la position des opérateurs, comme les représentants des PME, et notamment les chambres de commerce. Des actions peuvent en particulier avoir pour but de créer et promouvoir un tourisme durable et innovant via des produits et des services à des niveaux frontaliers et transnationaux autour de thèmes spécifiques (comme l'héritage culturel côtier et sous-marin), de développer de nouvelles routes thématiques (notamment de croisière et nautiques), et d'encourager le tourisme nautique en mettant en place des standards de qualité pour les ports touristiques et les marinas.

### PANEL

#### Co-présidente:

- M. Michel Durrieu, Chef de l'unité Tourisme, Ministère des Affaires Etrangères et du Développement international (Odysée 2020), France
- Mme Donatella Soria, Unité pour le Tourisme et les Industries émergentes et créatives, Direction générale du marché intérieur, de l'industrie, de l'entrepreneuriat et des PME, Commission européenne

#### Panélistes:

- Mme Sandrine Devos, Secrétaire Général, European Boating Industry
- M. Marco Di Gioia, Directeur, Affaires Gouvernementales pour CLIA Europe (Association des lignes de croisière internationales)
- Mme Raquel Huete Nieves, Secrétaire Général pour le Tourisme, Gouvernement Régional de Valence, Espagne
- Mme Susana Ibáñez Rosa, Secrétaire Général pour le Tourisme, Gouvernement Régional de l'Andalousie, Espagne
- M. Regis Lopez Lang, Représentant, Europe – Amérique Latine- Caraïbes, "Odyssea 2020 Growth and Blue Tourism"
- M. Roberto Perrochio, Président, Association Italienne des Marinas (ASSOMARINAS)
- M. Abdelhamid Terghini, Directeur, Aménagement touristique et Préservation du Foncier Touristique, Ministère de l'Aménagement du Territoire, du Tourisme et de l'Artisanat (MATTA)
- Mme Annalisa Zarattini, Expert, Patrimoine culturel subaquatique, Ministère du Patrimoine culturel et du tourisme, Italie

## 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.

Tourism<sup>1</sup> 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"<sup>2</sup>, 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'<sup>3</sup> are pressured by the competition of global destinations offering greater value for money, more authentic experiences and/or high-quality services.<sup>4</sup> 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)<sup>5</sup>.

### What are the persisting problems and gaps identified?

As highlighted in the European Strategy for Coastal and Maritime Tourism and in recent studies<sup>6</sup>, 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 2015<sup>7</sup>), 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

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<sup>1</sup> 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.

<sup>2</sup> COM (2014) 86

<sup>3</sup> [http://ec.europa.eu/maritimeaffairs/documentation/studies/documents/study-maritime-and-coastal-tourism\\_en.pdf](http://ec.europa.eu/maritimeaffairs/documentation/studies/documents/study-maritime-and-coastal-tourism_en.pdf)

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

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

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

<sup>7</sup> <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 seem 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?