



SUB-CLUSTER ON INNOVATION THROUGH NEW
METHODOLOGICAL APPROACHES AND ADRION
BRANDING

**Sustainable development of the tourism sector in the
ADRION macro region
A strategic proposal for the programming period 2021-2027**

*A policy paper by the ADRION
3rd Thematic Sub-cluster
'Innovation through new methodological approaches
and models and ADRION branding'*



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¹ <https://www.adrioninterreg.eu/index.php/2021/11/05/adrion-thematic-sub-cluster-on-innovation-and-adrion-branding/>

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Introduction

This policy paper provides a strategic proposal for the promotion of cultural and sustainable tourism in the programming period 2021-2027 in the Adriatic Ionian macro-region (hereinafter referred to as ADRION region).

The paper is prepared as part of the project THEMATIC, which is funded under the Interreg ADRION Programme 2014-2020, jointly through Thematic Cluster 'Towards Sustainability in Cultural and Natural Tourism Destinations' - sub-cluster No3 on 'Innovation through new methodological approaches and ADRION branding' activities².

The THEMATIC project aims at creating and fostering the innovation capacities in the field of sustainable and accessible tourism development. The project's main result includes increased innovation capacities among stakeholders of the tourism system based on natural and cultural resources in the ADRION region, and the launch of pilot projects transferring these capacities to the partner regions³.

The policy paper is built on the THEMATIC project experience and also on the output of the participation of the THEMATIC project in the ADRION thematic cluster initiative. More specifically, the 3rd sub-cluster on sustainable tourism that focuses on the promotion of innovative models and new methodological approaches to boost sustainable tourism in the ADRION region and to develop the ADRION branding added further value to the work on recommendations.

77 partners from 8 ADRION projects joined forces in the framework of the

² www.adrioninterreg.eu/index.php/2021/11/05/adrion-thematic-sub-cluster-on-innovation-and-adrion-branding/

³ <https://thematic.adrioninterreg.eu/>

cluster (SUSTOURISMO ⁴, WONDER ⁵, PRONACUL ⁶, ADRILINK⁷, TRANSFER ⁸, ADRINETBOOK ⁹, THEMATIC¹⁰, SMART Heritage¹¹) in order to identify common challenges threatening the sustainability of ADRION's tourism sector.

Evidence-based policy responses, new methodological approaches and innovative cooperation schemes and models are examined and recommendations for boosting sustainable tourism are to be provided.

This paper is the main deliverable of the selected activity No6 of the TC:

- Act. 6: Elaboration of specific analysis in the fields/sectors/themes covered by the specific Thematic Cluster and/or position paper/policy paper/recommendations for influencing the policy debate in the theme of the Thematic Cluster; led by THEMATIC project, contribution: all projects.

The paper contains three chapters:

1- The European Framework in the programming period 2021-2027

Chapter 1 presents key concepts related to cultural and sustainable tourism as well as the relevant European Framework including key EU programmes and the territorial cooperation in the new programming period 2021-2027 in the Adriatic Ionian Region.

2- Strategic territorial analysis of the ADRION macro region

A strategic territorial analysis has been conducted based on the inputs from the partners of the thematic sub-cluster to identify and assess the main constraints,

⁴ <https://sustourismo.adrioninterreg.eu/>

⁵ <https://wonder.adrioninterreg.eu/>

⁶ <https://pronacul.adrioninterreg.eu/>

⁷ <https://adrilink.adrioninterreg.eu/>

⁸ <https://transfer.adrioninterreg.eu/>

⁹ <https://adrinetbook.adrioninterreg.eu/>

¹⁰ <https://thematic.adrioninterreg.eu/>

¹¹ <https://smartheritage.adrioninterreg.eu/>

needs, challenges and opportunities for the sustainable development of tourism in the post-COVID-19 scenario, which can be addressed by joint actions and strategies in the programming period 2021-2027.

3- Joint strategic actions for a sustainable tourism sector in the ADRION region after the COVID-19 pandemic

Joint strategic actions that can be implemented in the framework of territorial cooperation have been identified, with active participation of the partners of the thematic sub-cluster. Special attention has been paid to the post-COVID-19 scenario, sustainability and to the opportunities for joint actions at macro-regional level.

1. The European Framework in the programming period 2021-2027

Chapter 1 presents an overview of the key concepts of sustainable and cultural tourism, the impact of the COVID-19 pandemic and the relevant European Framework including key EU programmes with special focus on territorial cooperation and priorities for investments in sustainable tourism and cultural resources.

1.1 Sustainable and cultural tourism

Tourism is one of the economic industries with a significant potential to generate future growth and employment in Europe. However, its growth and competitiveness need to be closely linked to sustainability which requires a balance between economic, cultural, social and environmental sustainability.

Sustainable tourism can be defined as "tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities" (UNWTO, 2005).

The "Agenda for a sustainable and competitive European tourism" presented in the Commission Communication of 19 October 2007 [COM (2007) 621] sets specific objectives that aim to guide tourism actions by considering the welfare of visitors and carrying capacity of individual sites and wider areas, respecting the natural and cultural environment and ensuring the socio-economic development and competitiveness of destinations and businesses through an integrated and holistic policy approach.

One of the major assets for tourism development is culture, which on the other hand is also one of the major beneficiaries of it. Culture creates distinctiveness of the tourism product in the global marketplace and promotes regions, even those that have traditionally relied on natural assets for their attractiveness,

such as sun and beach or mountains (OECD, 2009).

The United Nations World Trade Organisation (UNWTO) defines ***cultural tourism*** as:

A type of tourism activity in which the visitor's essential motivation is to learn, discover, experience and consume the tangible and intangible cultural attractions/products in a tourism destination. These attractions/products relate to a set of distinctive material, intellectual, spiritual and emotional features of a society that encompasses arts and architecture, historical and cultural heritage, culinary heritage, literature, music, creative industries and the living cultures with their lifestyles, value systems, beliefs and traditions (UNWTO, 2019).

According to the European Commission¹², cultural tourism accounts for 40% of all European tourism; 4 out of 10 tourists choose their destination based on its cultural offering. 68% of Europeans agree that the presence of cultural heritage can influence their holiday destination (Eurobarometer 466, 2017). Alternatively, even if culture itself may not be the primary reason to travel, tourists commonly use cultural services and facilities during their stay.

Tourism and culture have become more strongly linked in the last decades, partly due to the increased interest in culture (especially as a source of local identity in a globalising world), the growth of tourism and easier accessibility of cultural assets and experiences. In addition, cultural tourism is seen as a desirable, 'good' form of tourism for regions to develop because it generates benefits (UNWTO, 2018).

The direct and indirect benefits of this symbiotic relationship between culture and tourism can be cultural, economic and social. For example, cultural heritage generates substantial earnings for the tourism industry, while tourism can be

¹² https://ec.europa.eu/growth/sectors/tourism/offer/cultural_en

good for culture, encouraging the display and conservation of cultural assets and generating revenue needed for their preservation (European Parliament, 2015).

Additionally, arts and crafts, dances, rituals and legends that are at risk of being forgotten by the younger generation may be revitalised when tourists show interest in them (UNWTO, 2018). On the supply side, the tourism supply chain actors play an important role in promoting and preserving the local identity. Moreover, monuments and cultural relics can be preserved by using funds generated by tourism.

Nowadays, this relationship is, however, being rapidly transformed due to changing lifestyles, new forms of culture and creativity and new technologies. The culture related to tourism has become less tangible, more accessible and more bottom-up driven than before. All these have created challenges and opportunities in developing and utilizing the synergies between tourism and culture (UNWTO, 2018).

Emphasis is also being placed on the “place-based cultural tourism” approach. Different from attractions-based cultural tourism (that is supplier-driven and commonly relies on cultural icons such as museums, galleries, festivals and heritage sites), place-based cultural tourism is customer-oriented. It aims to capitalise on a destination’s unique identity, cultural character and sense of place by also understanding travel motivations and behaviours of cultural tourists. By doing so, it maximizes the destination’s appeal to tourists and the benefits from cultural tourism (Thorne, 2008).

Another increasingly important concept for cultural tourism is sustainable cultural tourism, which combines two elements ‘sustainable culture’ and ‘sustainable tourism’. The European Commission defines **sustainable cultural tourism** as:

“...the integrated management of cultural heritage and tourism activities in conjunction with the local community, creating social, environmental and economic benefits for all stakeholders in order to achieve tangible and intangible cultural heritage conservation and sustainable tourism development” (European Commission, Sustainable Cultural Tourism report 2019).

This concept is also linked to the so-called endogenous development of a destination. This approach takes into account the local people's material, social and spiritual well-being aiming at creating three main benefits: sociocultural enriching, environmentally sustainable and economically viable (Hoffmann 1995; Lagos & Curtis, 2004).

Furthermore, the three objectives of the UN 2030 Agenda for Sustainable Development – promoting social cohesion, encouraging economic growth and strengthening international relations – are also relevant to the concept of sustainable cultural tourism (European Commission 2018: The [New European Agenda for Culture](#)).

In this context, culture serves as both a driver and an enabler of sustainable development (UNESCO, 2012). This means that the benefits of cultural tourism to local communities in attracting visitors can be retained, while disadvantages such as those related to potential degradation of cultural sites and practices through overuse (e.g. overtourism) and commodification should be mitigated (European Commission, 2019).

The [European Parliament Resolution](#) of 25 March 2021 on establishing an EU strategy for sustainable tourism particularly calls on the Member States to allocate funding to culture and cultural heritage sites without forgetting their intrinsic value as a part of our cultural heritage that needs to be protected, not least from climate change, overtourism and recently from the COVID-19 crisis.

1.2 Impact of the COVID-19 pandemic

As the current pandemic is showing, tourism can be easily vulnerable to various challenges which hamper its development such as geopolitical crises and

natural factors. Among natural factors, climate change and global health emergencies are considered the most relevant in the new century (Jamal & Budke, 2020).

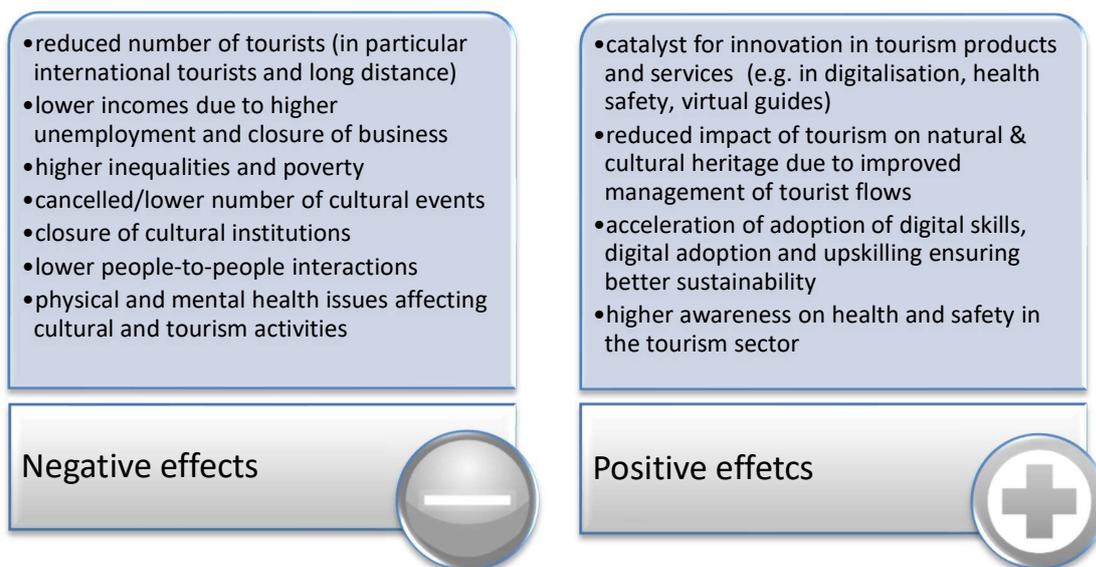
While the COVID-19 is not the first health crisis affecting tourism, its rapid spread and its impacts, both economic and social, are unprecedented (Gössling, Scott & Hall 2020). Within few months, the framing of the global tourism system moved from overtourism to non-tourism affecting both the supply and demand side.

Regarding cultural tourism, the impact of the crisis has been very diverse. Some of the main risks are related to an increase in inequalities and differences in sectorial income, employment and investment due to varying impact of the crisis and capacity to recover (Jamal & Budke, 2020; Perretti, Pinto & Marani, 2021). At the same time, the extent of the crisis and the enormous public and private investment, including in research and development, has generated structural adjustments and innovations that could be considered as “positive outcomes” of the pandemic.

The differences on the impact of these effects depend however on the characteristics of each area such as the weight of tourism in the local economies, the share of small and micro businesses and the share of tourist infrastructures offering free public services (not revenue generating bodies), among others (Perretti, Pinto & Marani, 2021).

Some main effects caused or triggered by the pandemic are:

Figure 1: Main effects caused or triggered by the COVID-19 pandemic



Source: own elaboration based on other sources (e.g. UNESCO, 2021)¹³

In this context, the area-based development approach may be particularly relevant to target specific geographical areas characterised by a complex development problem through an integrated, inclusive, participatory and flexible approach (Harfst, 2006).

The ADRION programme area is an example where many local economies are largely dependent on tourism and where cultural tourism is very heterogeneous including on the one hand destinations that are severely affected by overtourism (e.g. Venice, Athens) and on the other, destinations which, despite their rich cultural heritage, are trapped in undertourism (Fusco Girard & Nijkamp, 2009).

The economic and financial structures are also heterogeneous with cultural institutions entirely dependent on public finances and others generating strong

¹³ <https://en.unesco.org/news/culture-covid-19-impact-and-response-tracker>

revenues. As a result, the impact of the pandemic is also very diverse and the differences may widen the longer the crisis continues (Perretti, Pinto & Marani, 2021).

While the road ahead may appear uncertain, recent experiences (e.g. TraCEs project¹⁴) are demonstrating that even challenges such as the COVID-19 pandemic can be converted into opportunities for tourism and culture sectors to cooperate in order to develop new tourism experiences and redesign the future of tourism in Europe.

The pandemic has led to a shift in travellers' demands towards safe, clean and more sustainable tourism (European Parliament, 2021). This shift requires, however, the contribution of all key stakeholders, from governments and businesses to employees and destinations including tourism organisations, local communities and even visitors that proactively come together and support cultural tourism and the sustainable development of the tourism sector.

Cultural tourism can also act as a catalyst for strengthening the mutual understanding of people by allowing them to discover European cultural heritage. The European Parliament in its resolution (Art. 42) encourages the promotion of excellence in sustainable cultural tourism and stresses the need to foster collaboration between experts in cultural tourism and to promote cooperation and exchange of best practices in the sector.

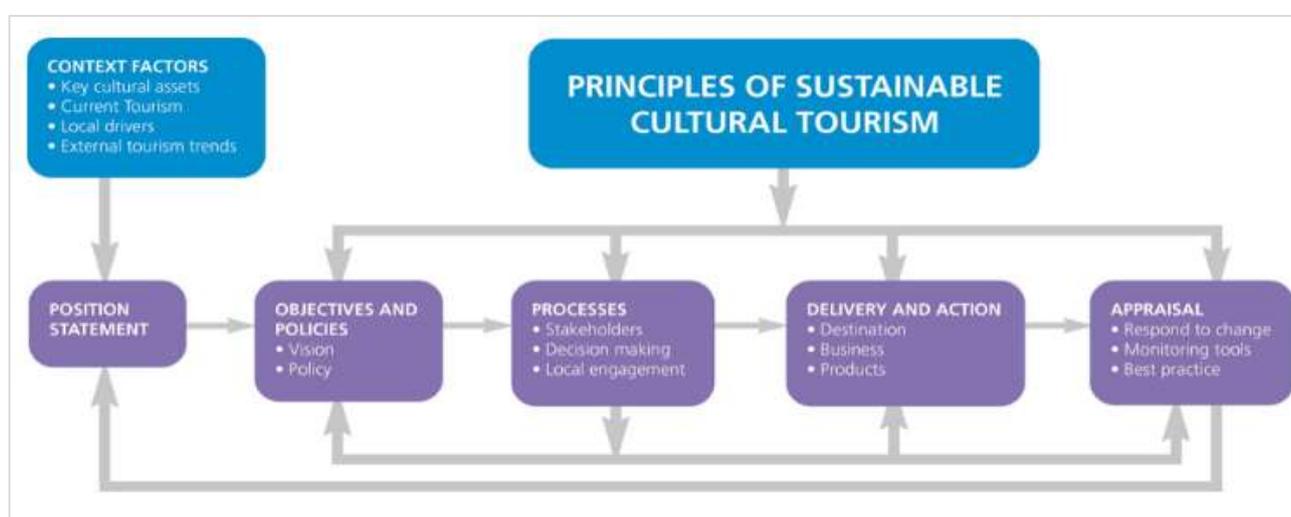
Existing or new collaborative platforms and initiatives could serve as important drivers for bringing stakeholders and communities together. For example, the [Barcelona Declaration](#) (launched in the European Year of Cultural Heritage 2018) aims to be an open initiative of relevant stakeholders to address sustainable cultural tourism and encourages greater synergy between cultural heritage and tourism stakeholders.

Luger and Ripp in the “Guidelines for sustainable cultural tourism-a unique

¹⁴ <https://www.interreguurope.eu/ecoc-sme/news/news-article/11350/pandemic-proof-the-cultural-and-tourism-sectors/>

opportunity for change post Covid-19” present a scoping tool as the first key step to help ensure that the tourism offer developed is both sustainable and resilient and meets local and visitor needs. Based on their paper, an effective framework requires an integrated approach to: developing a position statement; objectives and policies; processes; delivery and action; as well as a basis for appraisal (see Figure 2).

Figure 2: Sustainable cultural tourism – a dynamic process



Source: Luger, K. and Ripp, M (2020)

The guidelines embody the fact that places and cultural tourism are not static but exist in relationships that affect each other.

1.3 The EU Cohesion Policy

The Cohesion Policy is the EU’s main investment policy which contributes to strengthening economic, social and territorial cohesion in the European Union. It aims to correct imbalances between countries and regions and delivers on the Union's political priorities, especially the green and digital transition. Hence, it also serves as a main instrument that supports the recovery¹⁵ and promotes the sustainable development of tourism and cultural tourism.

¹⁵ This paper lists only some relevant instruments that are financed under the Cohesion Policy 2021–2027. Other recovery funds such as the EU Recovery and Resilience Facility are not included.

The Cohesion Policy 2021–2027 is delivered through specific funds, whose allocations fall under the following “goals” and “headings”:

Figure 3: EU Cohesion Policy overview



Source: European Commission, 2021¹⁶

The European Regional Development Fund (ERDF) aims to strengthen economic, social and territorial cohesion in the EU by correcting imbalances between its regions. For the programming period 2021-2027 the ERDF focuses on **5 policy objectives (PO)**¹⁷:

- PO1: *A more competitive and smarter Europe*, through innovation and support to small and medium-sized businesses, as well as digitisation and digital connectivity;
- PO2: *A greener, low-carbon and resilient Europe*;
- PO3: *A more connected Europe* by enhancing mobility;
- PO4: *A more social and inclusive Europe*, supporting effective and inclusive employment, education, skills, social inclusion and equal access

¹⁶ cohesiondata.ec.europa.eu/stories/s/2021-2027-EU-allocations-available-for-programming/2w8s-ci3y/

¹⁷ Regulation (EU) 2021/1058 of 24 June 2021 on the European Regional Development Fund and on the Cohesion Fund

to healthcare, as well as enhancing the role of culture and sustainable tourism;

- PO5: *A Europe closer to citizens*, supporting locally-led development and sustainable urban development across the EU.

The ERDF explicitly addresses the topics of sustainable tourism and culture under two of its policy objectives and related specific objectives (SO):

- PO4: *A more social and inclusive Europe* by:
 - SOiv: enhancing the role of **culture and sustainable tourism** in economic development, social inclusion and social innovation
- PO5: *A Europe closer to citizens* by:
 - SOi: fostering the integrated and inclusive social, economic and environmental development, **culture, natural heritage, sustainable tourism** and security in urban areas;
 - SOii: fostering the integrated and inclusive social, economic and environmental local development, **culture, natural heritage, sustainable tourism** and security in areas other than urban areas.

The ERDF Regulation suggests that a dedicated specific objective should be provided to support the regional economies which are strongly dependent on the tourism and cultural sectors in order to exploit the full potential of sustainable tourism and culture for an economic recovery, social inclusion and social innovation.

In addition, measures supporting the creative and cultural industries, cultural services and cultural heritage sites could be financed under any policy objective provided that they contribute to the specific objectives, and they fall within the scope of ERDF. For example, sustainable tourism and culture can be indirectly addressed under the following objectives:

- PO1: *A more competitive and smarter Europe*, by promoting innovation and digitisation in tourism and culture;

- PO2: *A greener, low-carbon and resilient Europe*, by enhancing protection and preservation of natural and cultural heritage and reducing all forms of pollution, as well as promoting climate change adaptation and disaster risk prevention and resilience;
- PO3: *A more connected Europe*, by enhancing sustainable mobility that support tourism at regional, local level and across the border;
- PO4: *A more social and inclusive Europe*, by addressing issues related to health care, labour market as well as education and training that are relevant for ensuring a competitive and sustainable tourism industry especially in marginal areas.

The territorial cooperation instrument (**Interreg**) is another key EU instrument which supports cooperation across borders through project funding (supported by the ERDF and external financing instruments of the Union) [Interreg Regulation (EU) 2021/1059].

In the 2021-2027 period, the Interreg programmes will continue to support interregional cooperation among regions from all across Europe to jointly tackle common challenges and find shared solutions.

In line with the overall EU's aim of promoting a balanced approach between the needs to boost growth on one side and preserving tangible and intangible cultural assets on the other, Interreg can serve as an important instrument to support the recovery from the crisis and promote sustainable development of the tourism industry in Europe.

Based on the objectives set out in Article 14 of the Interreg Regulation, joint actions can be implemented under the Interreg programmes which can directly or indirectly promote sustainable tourism and cultural tourism across borders.

1.4 ADRION Programme 2021-2027

In Europe, the Adriatic and Ionian macro region is one of the regions which has been mostly affected by the economic impact of the pandemic. In the entire Mediterranean region, the impact of the crisis, started in spring 2020, has been

amplified by the strong seasonality of tourism services and by its dependency on a large share of international demand (Suštar & Laškarić Ažić, 2020).

Cultural tourism has suffered the worst impact, including among others the cancellation and/or postponement of cultural events and study tours planned in 2020 as well as of the MICE business (meeting, incentives, conferences, exhibitions) which play an important role in the region.

Private and public organisations and institutions were also heavily affected by the pandemic, including especially revenue generating bodies owning and/or operating cultural sites, museums, historical locations, natural parks, and other actors providing secondary services, such as transport, accommodation, restaurants and food, health care etc. (Perretti, Pinto & Marani, 2021).

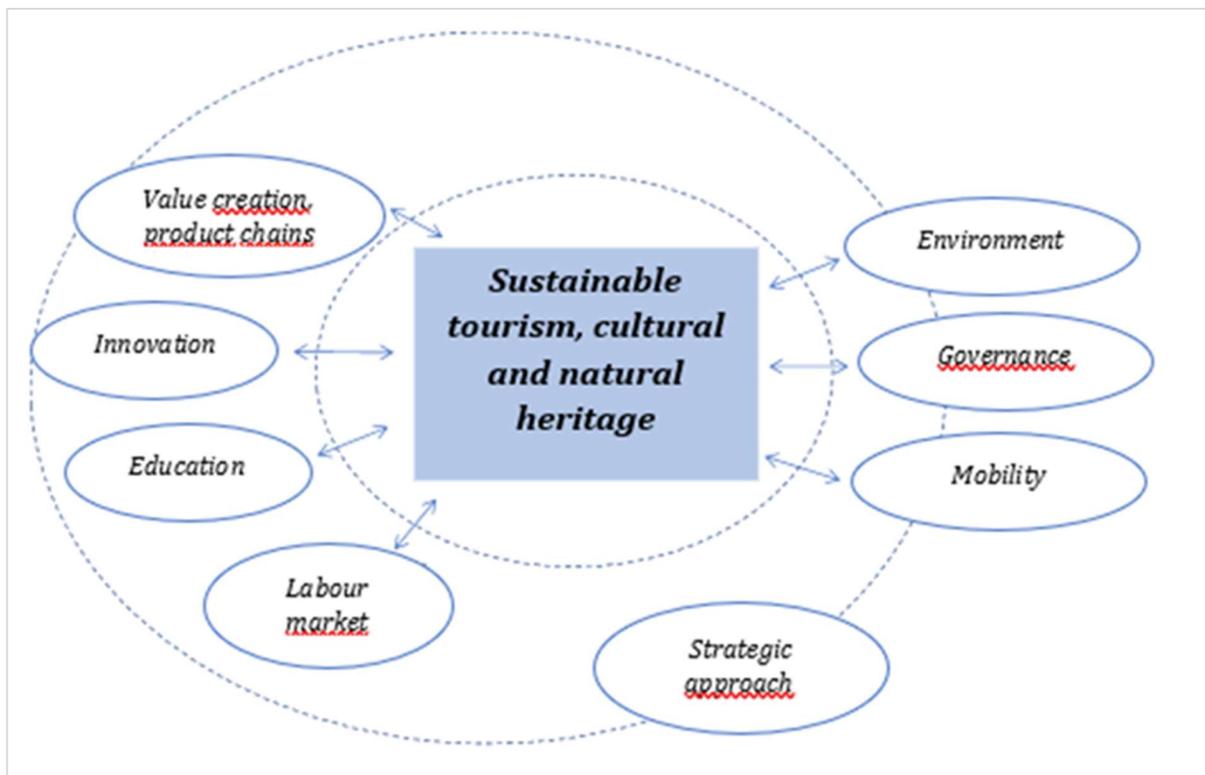
In this context, the Interreg ADRION Programme 2021–2027 has the potential to not only support the recovery process but to also develop joint effective measures that promote sustainable development in the future, especially in tourism (including cultural tourism) as a key sector of the Adriatic and Ionian region.

Shifting from quantity towards quality, diversifying and customizing cultural tourism products, engaging local communities, enabling entrepreneurship and innovation, and making cultural tourism accessible to all by also ensuring that the post-COVID-19 recovery leaves no one behind can be important building blocks for the recovery and long-term resilience of cultural tourism (UNWTO, 2021).

These and other related topics could be tackled either directly under the specific objectives addressing directly sustainable tourism and culture (e.g. PO4/SOvi), or horizontally under objectives that may in an indirect way support sustainable tourism and culture in the region. However, it is important to ensure an integrated implementation of joint measures and the involvement of the respective partners (and no longer only on a project-by-project basis).

This approach is also underlined in other Interreg programmes which have been drafted for the programming period 2021–2027 such as the Saxony-Czech Republic CBC programme. The draft document of this programme underlines that focusing on tourism, cultural and natural heritage should not represent a sectoral narrowing of a policy objective but a starting point for the integrative development of the border region (see Figure 4).

Figure 4: Tourism, cultural and natural heritage as integrative development themes



Source: draft Interreg Programme Saxony-Czech Republic 2021–2027

Future projects on cultural tourism in the ADRION region can be linked for example to various sectorial and horizontal aspects such as cultural heritage (contemporary art), inter-cultural exchange (language, history), ecology (sustainable products), environmental protection (sustainable mobility), climate change adaption (adaption policy to protect cultural heritage), regional

agricultural product chains (local culinary), education (digital skills) and innovation (new mediation concepts).

This should contribute to the enhancement of common tourism and the promotion of integrated local development in the region. Inspirational actions developed in larger cities can also be “scaled down” in other small and medium-sized cities and rural areas (Montalto, Sacco, Alberti, Panella & Saisana, 2020).

Moreover, strengthening the commitment of the population (including young people) to the preservation and development of cultural tourism can also be achieved through people-to-people projects (under the Interreg objective ISO1 “*a better cooperation governance*”). The respect for and understanding of cultural diversity between nations and people is a key principle of sustainable development (UNWTO, 2005).

2. Strategic territorial analysis of the ADRION macro region

Chapter 2 presents the main constraints, challenges, needs and opportunities for the sustainable development of tourism in the post-COVID-19 scenario in the ADRION macro region as revealed through a wide survey in the framework of ADRION Thematic Sub-cluster No3 on Innovation and ADRION Branding.

2.1 Key findings from the survey

The analysis is based on the results of the online stakeholder questionnaire conducted in November–December 2021 (ADRION Thematic Sub-cluster on Innovation and ADRION Branding).

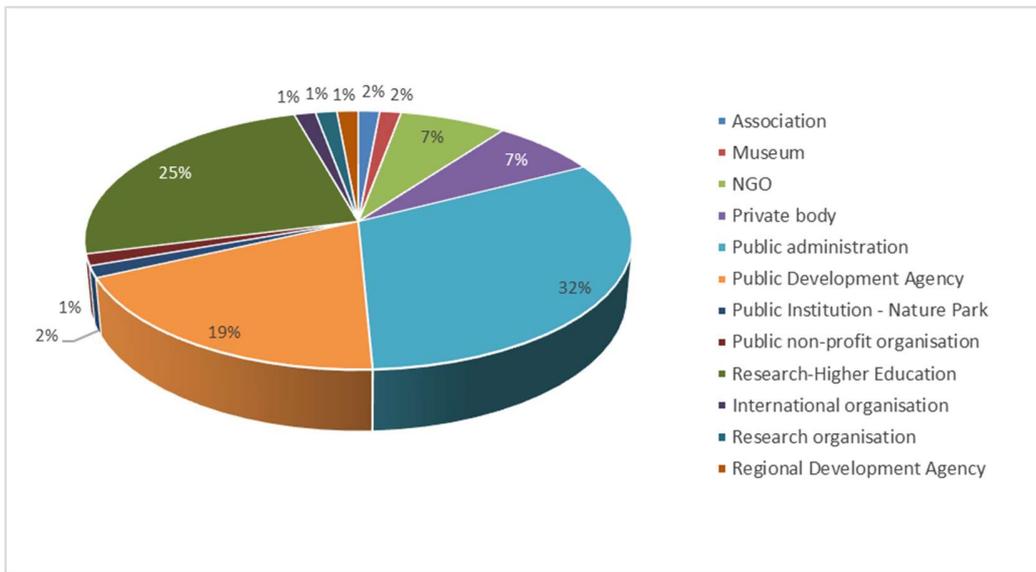
The questionnaire included three main sections:

- Section 1: General characteristics of the respondent
- Section 2: The impact of the COVID-19 pandemic and the measures taken to address its impacts
- Section 3: Future actions supported by public policies to restart tourism after the COVID-19 pandemic and promote sustainable development.

Overall, 69¹⁸ organisations from the ADRION region (8 sub-cluster project partners and relevant stakeholders) responded to the questionnaire, including in particular public administration (32%), research and higher education institutions (25%) and public development agencies (19%) (see Figure 5).

¹⁸ 69 out of 71 responses received were valid.

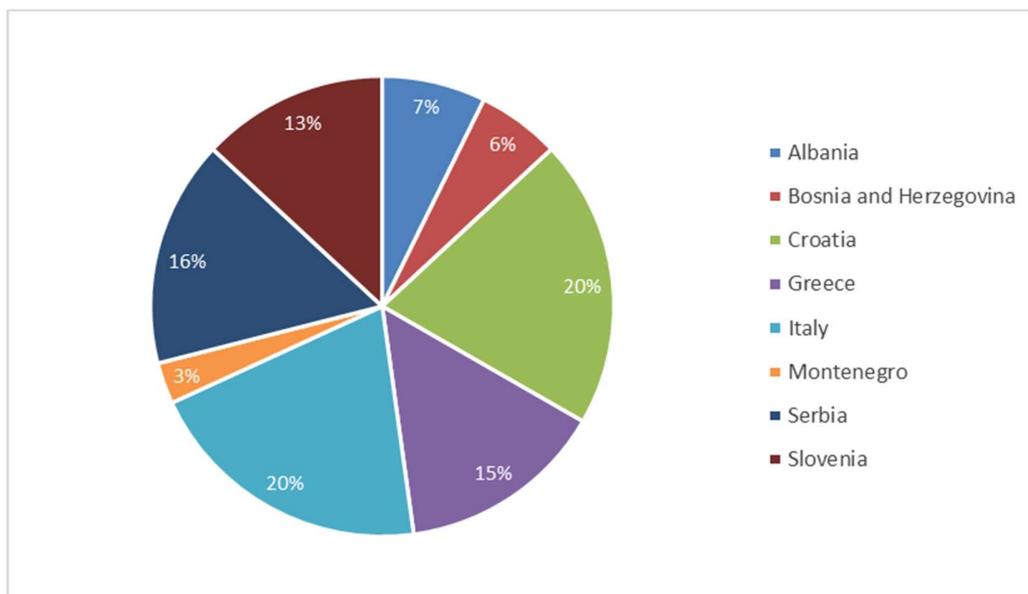
Figure 5: Type of respondents



Source: Survey 2021, ADRION Thematic Sub-cluster on Innovation and ADRION Branding

All ADRION partner countries were represented in the survey. The respondents were mainly from Croatia (20%) and Italy (20%), Serbia (16%) and Greece (around 15%) (see Figure below).

Figure 6: Share of respondents per country



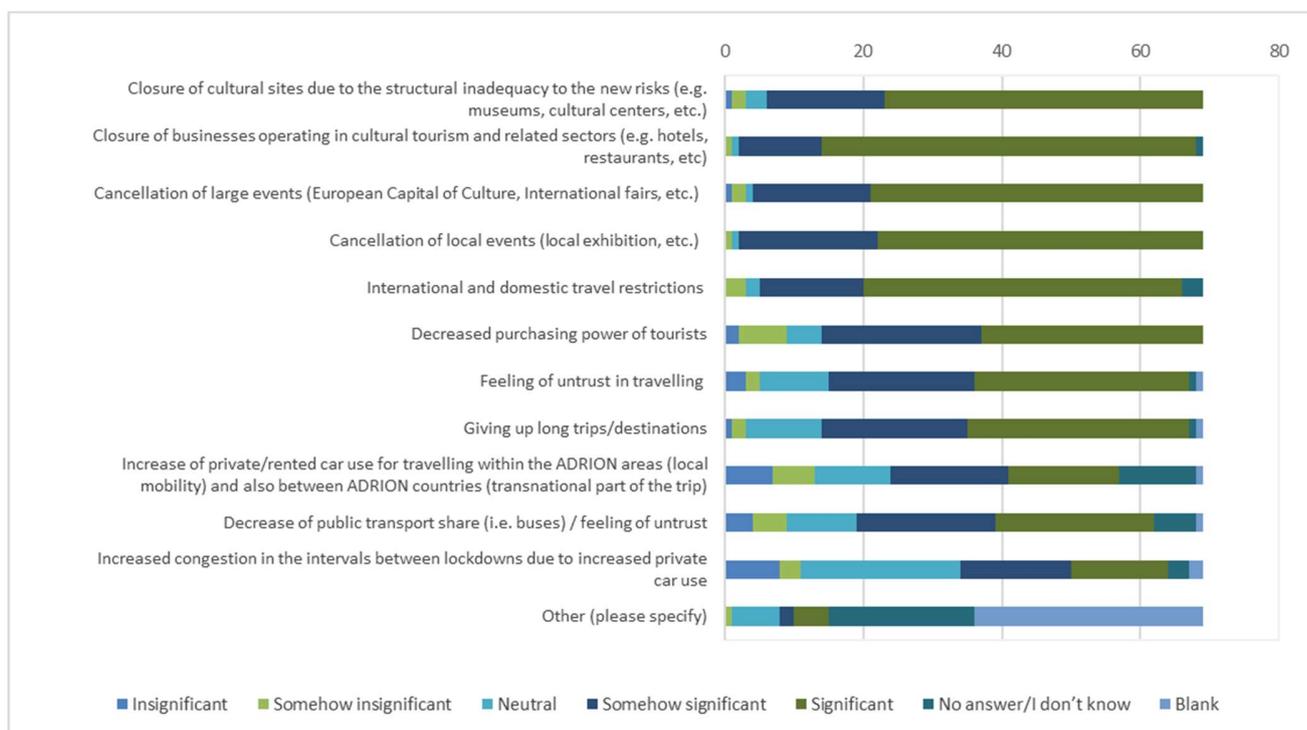
Source: Survey 2021, ADRION Thematic Sub-cluster on Innovation and ADRION Branding

i. The COVID-19 impact on cultural tourism

The most significant primary negative impacts of the pandemic on cultural tourism in the region which have been highlighted are:

- closure of businesses operating in cultural tourism and related sectors (e.g. hotels, restaurants, etc),
- closure of cultural sites due to the structural inadequacy to the new risks (e.g. museums, cultural centers, etc.),
- cancellation of large events (European Capital of Culture, International fairs, etc.),
- cancellation of local events (local exhibition, etc.), and
- international and domestic travel restrictions.

Figure 7: PRIMARY NEGATIVE impacts caused by the pandemic



Source: Survey 2021, ADRION Thematic Sub-cluster on Innovation and ADRION Branding

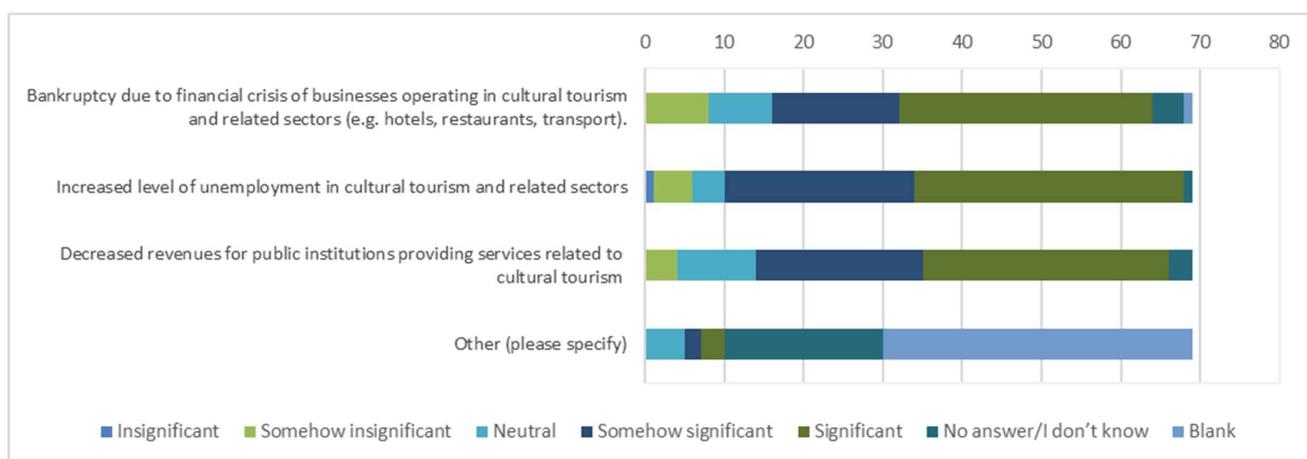
Other significant negative impacts deriving from the direct impacts of the pandemic include:

- bankruptcy due to financial crisis of businesses operating in cultural tourism and related sectors (e.g. hotels, restaurants, transport),
- the increased level of unemployment in cultural tourism and related sectors,
- decreased revenues for public institutions providing services related to cultural tourism.

Additional secondary impacts are related to the decreased (financial) support from the government and investments in tourism sector or the lack of a clear plan from public institutions on how to revive cultural tourism. One respondent

also highlighted that from the point of view of tourism workers, in many cases cultural tourism is not seen as prime tourism (tourism that has a lot of multiply effects), especially since this sector has been put in a very insecure position.

Figure 8: SECONDARY NEGATIVE impacts caused by the pandemic



Source: Survey 2021, ADRION Thematic Sub-cluster on Innovation and ADRION Branding

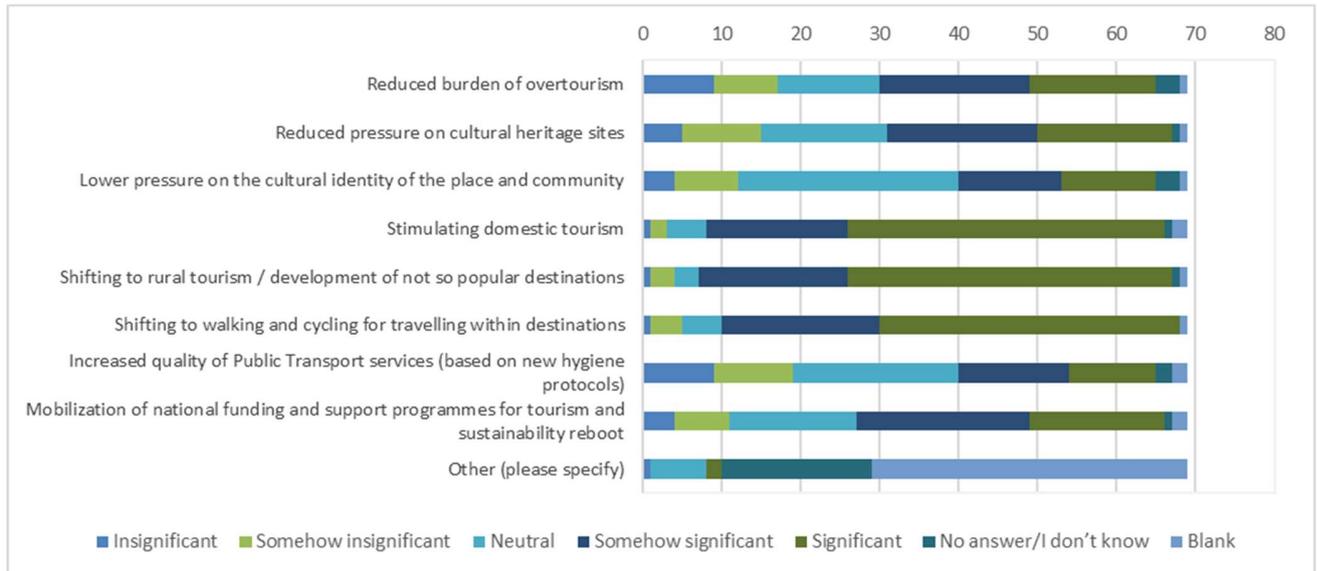
On the other hand, as mentioned in chapter 1, the pandemic has also triggered some effects that could be considered “positive” for their environmental, cultural and economic impact on the regions which are lagging behind and for minor tourist destinations (see Figure below).

Among them, key positive impacts can be considered:

- shifting to rural tourism/development of lesser-known destinations,
- stimulating domestic tourism, and
- shifting to walking and cycling for travelling within destinations.

Reduced burden of overtourism and reduced pressure on cultural heritage sites are considered as somehow significant and to some extent significant, while in some cases even insignificant.

Figure 9: PRIMARY “POSITIVE” impacts caused by the pandemic



Source: Survey 2021, ADRION Thematic Sub-cluster on Innovation and ADRION Branding

Other positive “side” effects mentioned by the partners are: better acknowledgement and understanding of the importance of cultural heritage, immaterial and material heritage as innovative tourist attractions, quicker shift of understanding of the necessity of modern interpretation with innovative tools (e.g. ICT), more domestic visitors in cultural sites and less congestion and air pollution.

In addition, some positive effects of the pandemic which have had a significant or somehow significant indirect impact on cultural tourism are the acceleration of the digital agenda (e.g. promoting digital skills, digital adoption and upskilling), higher awareness on health and safety in the tourism sector, promoting innovation and new technologies (e.g. in digitalisation, health, etc.) or increasing awareness of lesser-known cultural attractions, and ideas for upgrading the attractions in a sustainable way.

ii. Measures taken in the ADRION region affecting cultural tourism

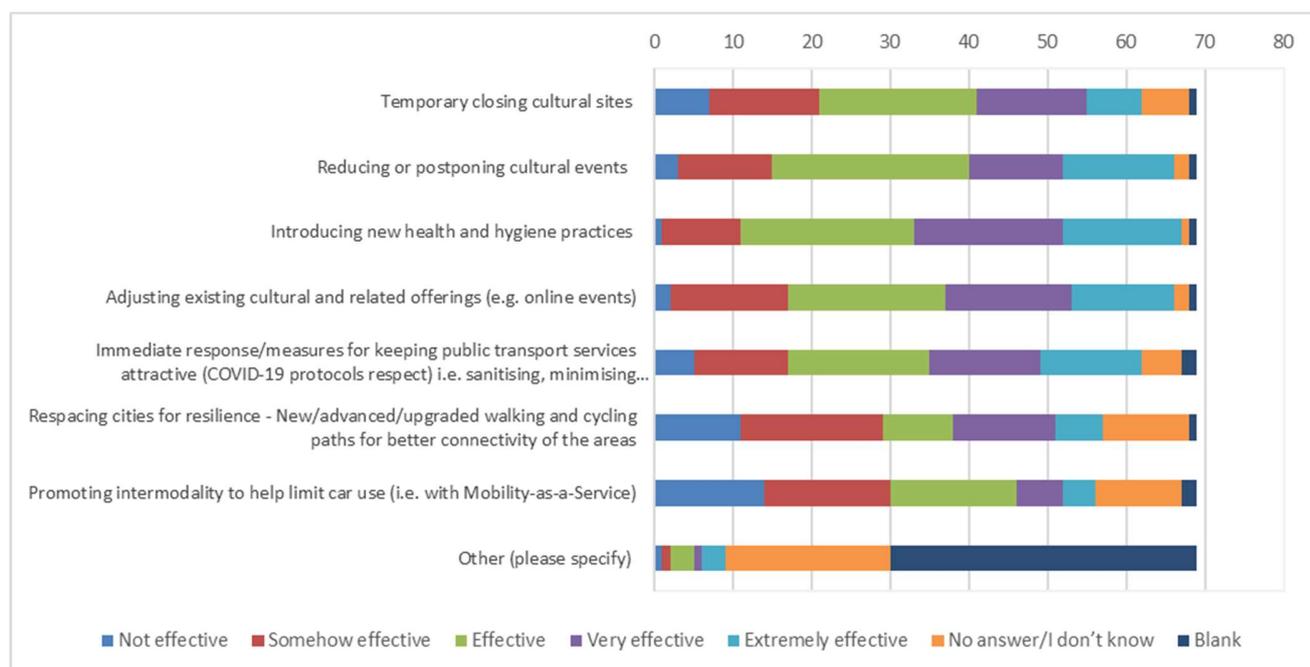
As in other macro regions, countries and regions in the ADRION area carried out various measures to mitigate the pandemic risks and to support the survival and recovery.

Figure 10 shows some immediate measures taken to mitigate the pandemic risks which were effective, very effective or extremely effective in almost all the ADRION partner countries.

They were mainly focused on:

- new health and hygiene practices,
- reduction or postponement of cultural events,
- adjusting existing cultural and related offerings (e.g. online events),
- temporary closure of cultural sites, and
- immediate measures for keeping public transport services attractive (COVID-19 protocols respect) i.e. sanitising, minimising interactions, and clearly communicating rules to follow for passengers.

Figure 10: *Immediate measures affecting cultural tourism taken to mitigate the pandemic risks in 2020, and their effectiveness*



Source: *Survey 2021, ADRIAN Thematic Sub-cluster on Innovation and ADRIAN Branding*

Other measures which were considered as very or extremely effective are the promotion of cultural attractions to domestic guests, tourist vouchers for visiting cultural attractions such as state vouchers offered to citizens in Slovenia to use for accommodation (in 2020) or for accommodation, restaurants, events etc. (in 2021).

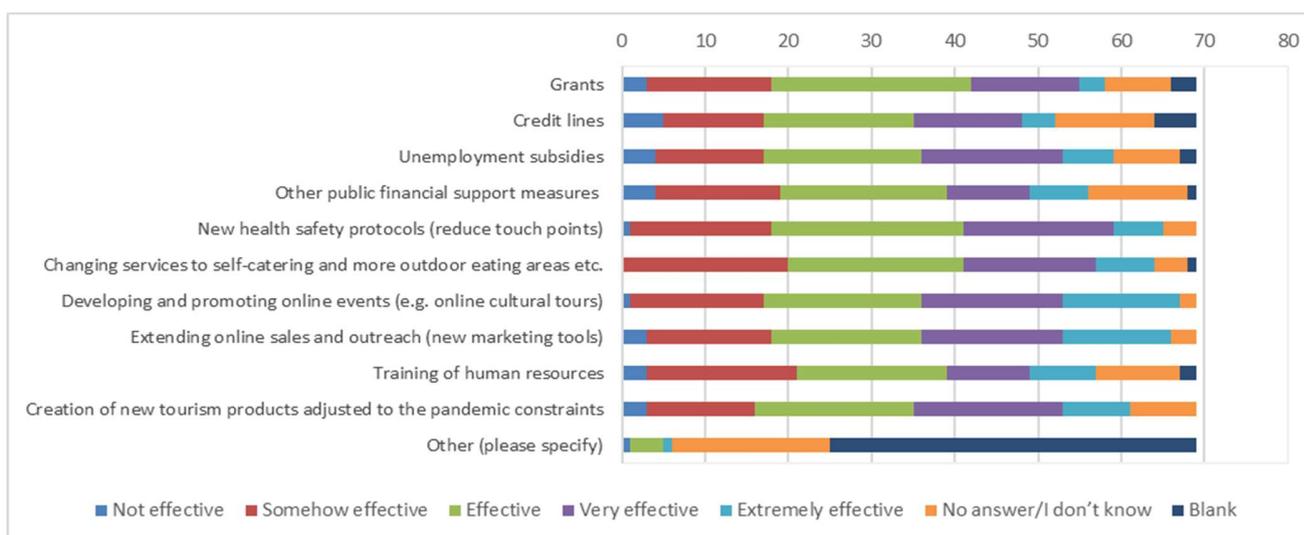
On the other hand, the promotion of alternative ways to help limit the use of private cars (i.e. Mobility-as-a-Service) and respacing cities for resilience (new/advanced/upgraded walking and cycling paths for better connectivity) were considered as somehow effective or to some extent ineffective.

On short-term measures affecting cultural tourism which have been taken by regions/countries and their stakeholders to support the survival and recovery

during the 2020-2021 period, the most effective ones are:

- developing and promoting online events (e.g. online cultural tours),
- extending online sales and outreach (new marketing tools),
- creating new tourism products adjusted to the pandemic constraints,
- new health safety protocols (reduce touch points),

Figure 11: Short-term measures affecting cultural tourism taken to support the survival and recovery during 2020-2021, and their effectiveness



Source: Survey 2021, ADRION Thematic Sub-cluster on Innovation and ADRION Branding

Unemployment subsidies, changing services to self-catering and more outdoor eating areas, paying part of the employees’ salaries with public support (in case of income reduction), tourist vouchers for domestic guests to visit cultural attraction and attend cultural events, home office or free access to famous cultural plays online were some other measures mentioned by the partners. Support from national funds and tools mobilized by the EU for supporting the recovery were also both necessary and effective.

The main reasons for considering the measures adopted by the national and regional governments and/or other stakeholders as effective were:

- stopping the mass spread of the pandemic,
- keeping the workforce active in short time,
- managing the touristic peaks in the main cultural sites,
- supporting private sector to overcome difficulties and bankruptcy through financial assistance,
- supporting the tourism sector through vouchers,
- supporting the adjustment of businesses and their products/services,
- engaging a new perspective of personal and communal hygiene and tourism activity,
- encouraging the acceptance and implementation of measures by all involved actors,
- accelerating the process of digitalisation and smart working which were not very existent before the pandemic,
- encouraging online training courses and initiatives,
- allowing access to cultural sites, museum, cinemas without limitations in capacity.

The focus on digital issues helped maintain alive the interest towards cultural assets. Moreover, new safety and hygiene standards were proved both necessary and effective and showed a new dimension that should also be followed after the COVID-19 pandemic. The pandemic also triggered not only a change in the way stakeholders in the tourism sector operate, but most importantly, a shift in the mindset of carrying out tourism-related activities, which could enable stakeholders to explore innovative ways for achieving their objectives.

However, it was highlighted that while these measures helped cultural institutions and sites to operate, they were not really effective in terms of developing new approaches in cultural tourism or new innovative tourism offer. The support measures also did not cover many tourism-related subjects or in some cases they did not put enough emphasis on smaller providers of tourism services (e.g. tour guides) taking as a point of reference big museums, parks and cultural realities and lacking the perspective of the medium and small cultural

realities. Their implementation and communication with the public could have also been better.

On other specific measures at country level, Greece implemented some temporary measures for mobility including pop-up walking and cycling paths contributing to a shift to a more sustainable and active way of living. 15min cities was also a concept gaining significant attention and showing how neighborhood planning can support sustainability. Improved quality of services in public transport, respecting new safety and hygiene standards improved the trust of travelers in public transport which also contributes significantly to its sustainability.

Greece was considered to be at the forefront in the use of a risk-based border management policy that includes looking at the risk an individual poses, rather than imposing restrictive conditions of entry on all travelers. For example, in June 2020, Greece reopened its borders to leisure tourism from other EU member states, expanding its approach from 1 July to all airports in Greece and from specified non-EU/Schengen area countries with relatively low COVID-19 cases. Unlike some other governments, it decided not to require the visitors from certain countries to automatically self-isolate for up to two weeks. Instead, it was an early adopter of more accurate and widespread testing protocols.

In addition, the health and tourism ministries collaborated to launch the 'Blue Freedom' plan in May 2021. This prioritised the vaccination rollout among the residents and hospitality workers on islands that particularly rely on the travel and tourism sectors, thereby stimulating confidence in potential tourists to travel to Greece considering it as a safe destination.

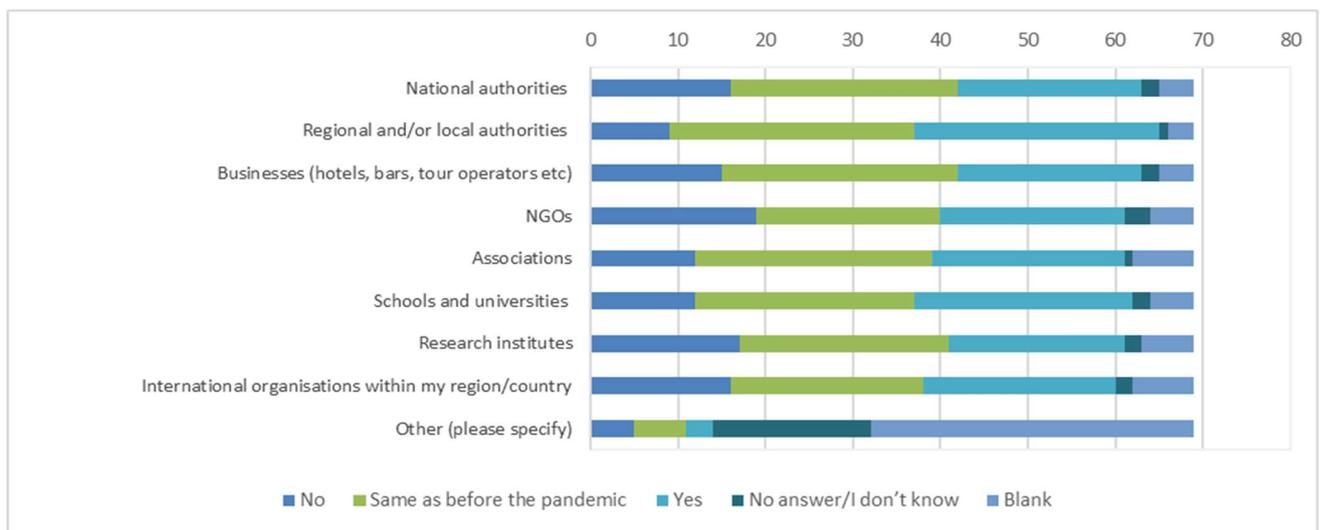
A similar strategy was adopted in Italy, especially in island destinations. For example, the Campania region promoted plans to achieve full vaccination of the population on islands (Capri, Ischia, Procida, etc) before the summer season.

iii. Cooperation between stakeholders in the ADRION region

In the context of responding to the COVID-19 pandemic, most of stakeholders related to cultural tourism have collaborated with other stakeholders within their own regions or countries (e.g. with regional or local authorities, schools and universities, etc.).

This was noted in all ADRION partner countries, in particular for public administration and public development agencies. For example, in Slovenia stakeholders organised themselves in an efficient regional group to discuss and exchange practices. Stakeholders were asked for help with ideas and recommendations much more often, which resulted in more cooperation than before. However, in other cases collaboration seems to have stayed at the same level as before the pandemic (see below).

Figure 12: In terms of responding to the COVID-19 pandemic, did you cooperate in any way with other stakeholders related to cultural tourism WITHIN YOUR REGION/COUNTRY?



Source: Survey 2021, ADRION Thematic Sub-cluster on Innovation and ADRION Branding

Changes in stakeholder cooperation were mainly related to:

- establishing common protocols on health safety. For example, in Greece closer cooperation between national authorities in the areas of transport,

tourism and health (ministries) and between research centers and ministries was mentioned; or between the Ministry of Tourism and the National and Regional Tourist Boards in Croatia.

- developing new tourism products and services such as those related to outdoor activities or adjustment through digitalisation and valorization and promotion of tangible and intangible cultural heritage for a wider audience (e.g. in Bosnia & Herzegovina, Serbia, Italy, Slovenia, etc.). Other tourism products and opportunities were introduced to promote domestic tourism (e.g. vouchers in Slovenia); visits in smaller groups; creation of itineraries in open air to valorize the cultural heritage or other products avoiding mass tourism (e.g. in Croatia); visiting more archeological parks in open air (e.g. in Greece), visiting cultural attractions in rural sites via new trails established, public transport used mainly for visitors (e.g. free shuttles in Slovenia).
- encouraging closer cooperation with businesses in the hospitality sector to promote integrated tourism and transport options and touristic packages in line with the COVID-19 protocols. Discussion with businesses to identify tourist needs during this period was also mentioned (e.g. in Greece). Cooperation with municipalities and regions was promoted to overcome barriers in mobility and use active modes of transport adapted to the restrictions (e.g. in Slovenia).
- improving the way of exchanging information and best practices through digitalisation. Virtual channels for meetings were developed, especially for scientific audiences and those focused on culture.
- trainings such as those focused on human resources, hospitality sector, or digital skills to adjust to the new reality (e.g. in Montenegro, Albania, Greece, Croatia, Italy, Slovenia, etc.)
- supporting activities for the design and management of financial support measures for businesses (e.g. in Italy).

However, the pandemic also brought about cooperation challenges such as:

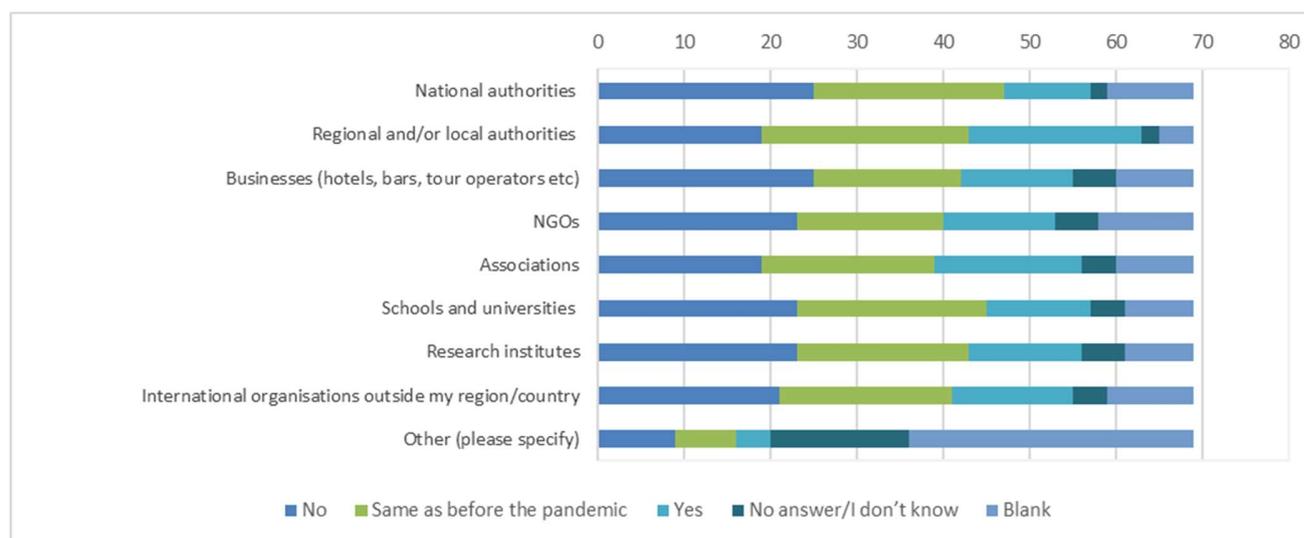
- difficulties to communicate, cooperate and coordinate due to the inability to talk in person. While online meetings were time and budget

efficient, better dialogue and connections are expected to be established during physical meetings. Respondents (e.g. in Slovenia) also mentioned the impact on the increased time needed to achieve certain goals (e.g. due to delays).

- planning due to ongoing changing measures.
- trainings and workshops were reduced and made harder (e.g. mentioned by partners in Croatia, Serbia, etc.). Furthermore, there was no possibility for internships for students in tourism-related businesses (e.g. in Serbia).
- safety protocols which were sometimes chaotic.

A slightly different picture is seen regarding stakeholder cooperation outside their regions or countries. Most stakeholders either did not collaborate with other stakeholder outside their region or country (especially mentioned by public development agencies and research and higher education institutions), or the level of collaboration remained the same as before the pandemic (e.g. for public administration).

Figure 13: In terms of responding to the COVID-19 pandemic, did you cooperate in any way with other stakeholders related to cultural tourism OUTSIDE YOUR REGION/COUNTRY?



Source: *Survey 2021, ADRION Thematic Sub-cluster on Innovation and ADRION Branding*

This was reflected in almost all ADRION partner countries, except for Albania where none of the respondents mentioned a lack of cooperation and their areas of cooperation were mainly related to sharing best practices, trainings and common protocols on health safety.

Overall, changes in cooperation between stakeholders outside their regions or countries were mainly related to:

- establishing common protocols on health safety,
- organising online meetings and trainings or enhancing digital collaboration for the implementation of project. However, as previously mentioned, despite time and budget efficiency reached through online events, better exchange and connections are expected during physical meetings. In addition, there was no possibility to conduct joint field research activities.
- creating new tourism products adjusted to the pandemic constraints, paying greater attention to the digitisation of tangible and intangible cultural heritage and developing pandemic touristic products to avoid mass tourism.
- contacting and cooperating with different EU regions and stakeholders by adding the dimensions of 'survival' and 'restart' after the COVID-19 pandemic. For example, stakeholders in Greece highlighted the indirect involvement of businesses (e.g. hotels, bars, tour operators etc) through cooperating networks (EU projects partners) as well as permanent established dialogue with universities and research institutes across EU to promote sustainability (exchange of experiences, co-identification of needs etc.).
- exchanging ideas with other colleagues in the EU (e.g. regions, tourist organisations, etc.) on how to react to the COVID-19 and identify measures from other regions in order to implement them in their regions.

- involving young people from all European countries and their recommendations on the COVID-19 situation, mental health and new habits was also given as a good cooperation example.

iv. Future steps to restart tourism after the COVID-19 pandemic and promote sustainable development

As mentioned in chapter 1, the ADRION region has been one of the most affected areas in Europe. The impact of the crisis has been amplified by the strong seasonality of tourism services and by its dependency on a large share of international demand.

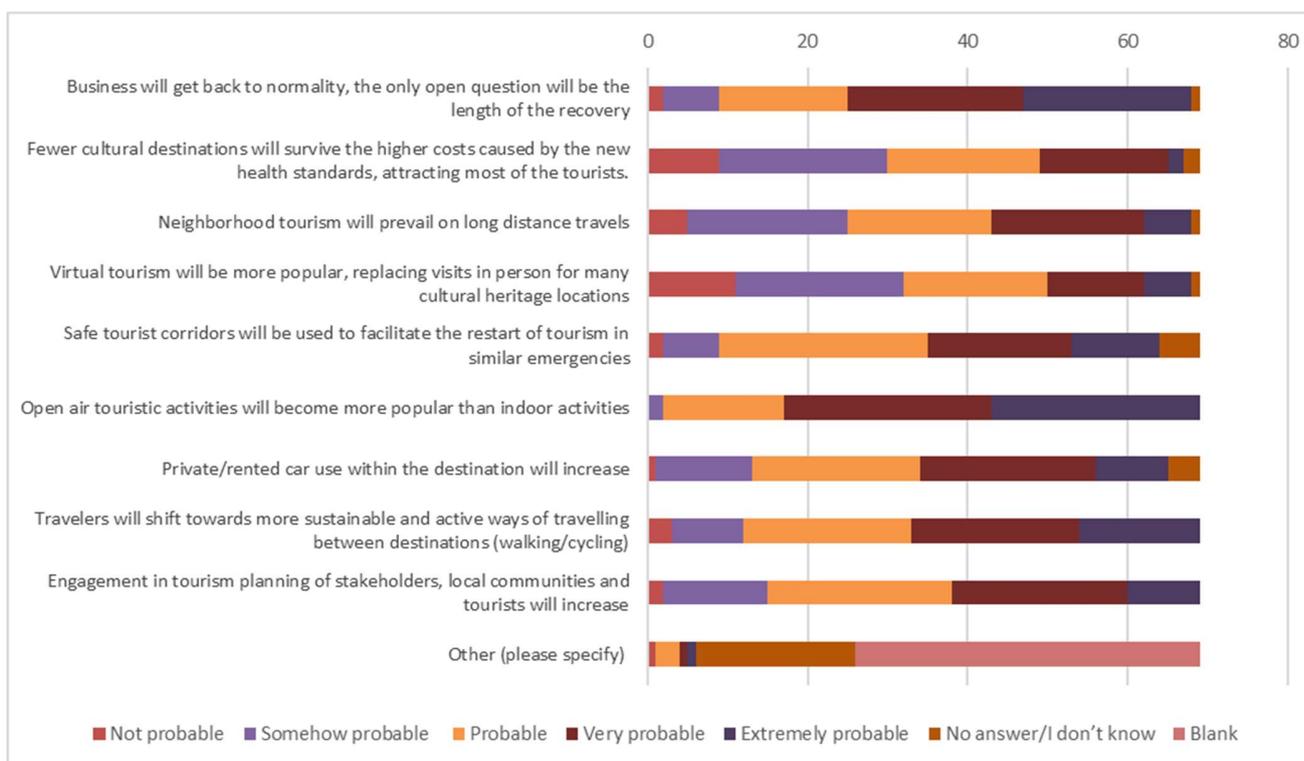
Regarding the most probable future scenarios of tourism (including cultural tourism) in the region, most of them (52 out of 69) expect the open-air touristic activities to become more popular than indoor activities. Likewise, a high number of stakeholders (43 out of 69) consider as very or extremely probable that businesses will get back to normality, the only question will be the length of the recovery.

Other changes are expected with regard to: shifting towards more sustainable and active ways of travelling among destinations (walking/cycling), tourism planning and increased engagement of stakeholders, local communities and tourists or use of safe tourist corridors¹⁹ to facilitate the restart of tourism in similar emergencies. On the other hand, an increase in the use of private/rented car use within the destination is also considered possible.

Figure 14: In your opinion, which will be the most probable future of tourism in the ADRION region?

¹⁹ In the context of the COVID-19 pandemic, safe tourist corridors are considered those that link countries and regions that apply safety protocols, which allow them to contain any outbreak of infections.

SUB-CLUSTER ON INNOVATION THROUGH NEW METHODOLOGICAL APPROACHES AND ADRION BRANDING



Source: Survey 2021, ADRION Thematic Sub-cluster on Innovation and ADRION Branding

Additional scenarios proposed by the stakeholders are:

- more precise planning and booking, more safety measures,
- reformed tourism sector as an answer to new emerged needs such as a change in the way tourism activities are carried out. In addition to more outdoor activities, tourists will pay more attention to safer public transportation means in terms of health and hygienic conditions. In the beginning they will most likely visit neighboring countries before traveling longer distances (a sense of insecurity is related to traveling long distance).
- quicker and significant shift to green sustainable practices and innovative products with small groups or/and individual programmes/visits. An increase is expected in areas focused on agro and eco-tourism, less massive tourism and more authentic experiences and personalized travel arrangements,

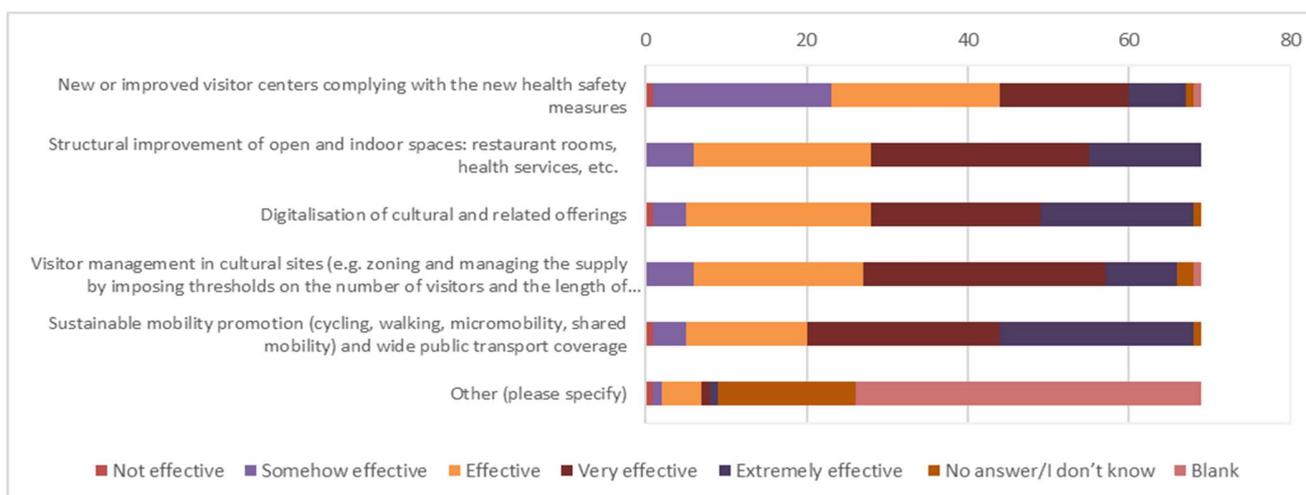
- increase of attractiveness of local tourism and second-tier or not very popular destinations,
- more digitalised tourism sector and with more safety and hygiene measures. Safe destinations, where hotels pay attention to all safety regulations are considered particularly relevant for elderly people.
- a more competitive tourism sector if lessons are learned from the prevention measures, and if the regions/countries orient tourism towards a smarter, greener and more sustainable sector.
- return to growth of the tourism sector, but with new players, and
- focus on higher quality over quantity.
- On the other hand, some stakeholders expect tourists to increasingly plan their visits but stay fewer days in the resort, or even a lower number of visitors and consumers and higher prices.

The most effective measures on the **supply side** to restore a sustainable development pattern in the tourism sector in the ADRION countries and regions in the new programming period are:

- promotion of sustainable mobility (cycling, walking, micromobility, shared mobility) and wide public transport coverage,
- digitalisation of cultural and related offerings, and
- structural improvement of open and indoor spaces (restaurant rooms, health services, etc) (see Figure 15).

These are followed by visitor management in cultural sites (e.g. zoning and managing the supply by imposing thresholds on the number of visitors and the length of visiting hours) and new or improved visitor centers complying with the new health safety measures.

*Figure 15: Which could be the most effective measures **on the supply side** to restore a sustainable development pattern in tourism in your region/country in the programming period 2021-2027?*



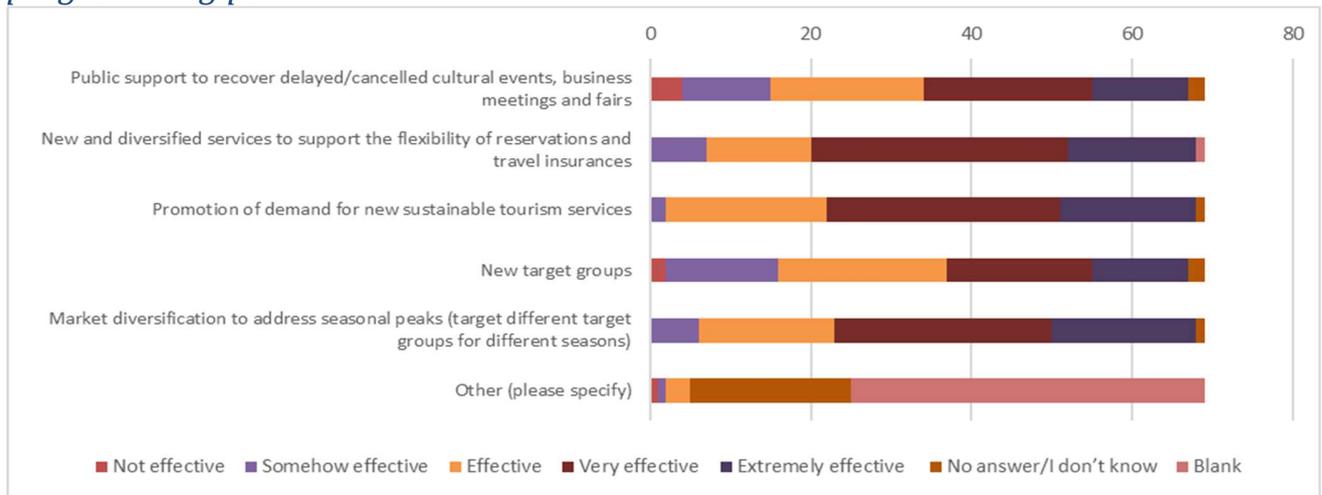
Source: Survey 2021, ADRION Thematic Sub-cluster on Innovation and ADRION Branding

Other measures proposed by stakeholders are: shifting to outdoor events, new or upgraded attractions developed and marketed, better logistics through mobile smart apps and increased pre-information in historical sites in order to reduce the visiting time.

On the **demand side**, the most effective measures to restore a sustainable development pattern in tourism in the ADRION countries and regions during the new programming period 2021-2027 are considered:

- market diversification to address seasonal peaks (target different groups for different seasons),
- promotion of demand for new sustainable tourism services,
- new and diversified services to support the flexibility of reservations and travel insurances (see Figure 16).

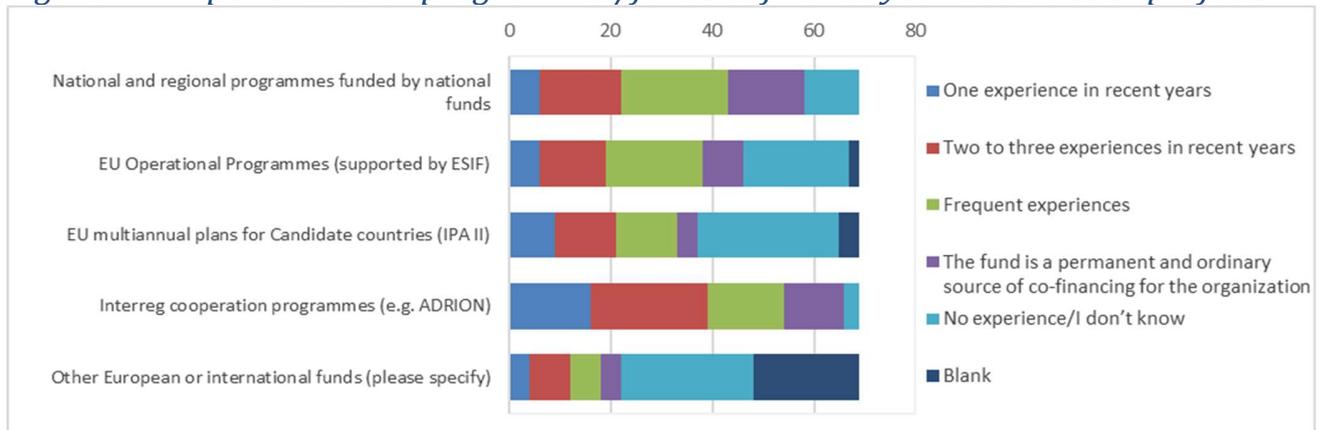
Figure 16: Which could be the most effective measures *on the demand side* to restore a sustainable development pattern in tourism in your region/country during the new programming period 2021-2027?



Source: Survey 2021, ADRION Thematic Sub-cluster on Innovation and ADRION Branding

National and regional programmes funded by national funds and Interreg programmes (e.g. ADRION) are considered as the main sources to finance stakeholders' activities in cultural tourism, followed by other EU Operational Programmes (supported by ESIF), EU multiannual plans for Candidate countries (IPA II), Erasmus and Horizon programmes, the EAFRD Rural Development Programmes, Council of Europe projects, etc. Other donors include embassies, Norway grants and international organisations (e.g. USAID), among others.

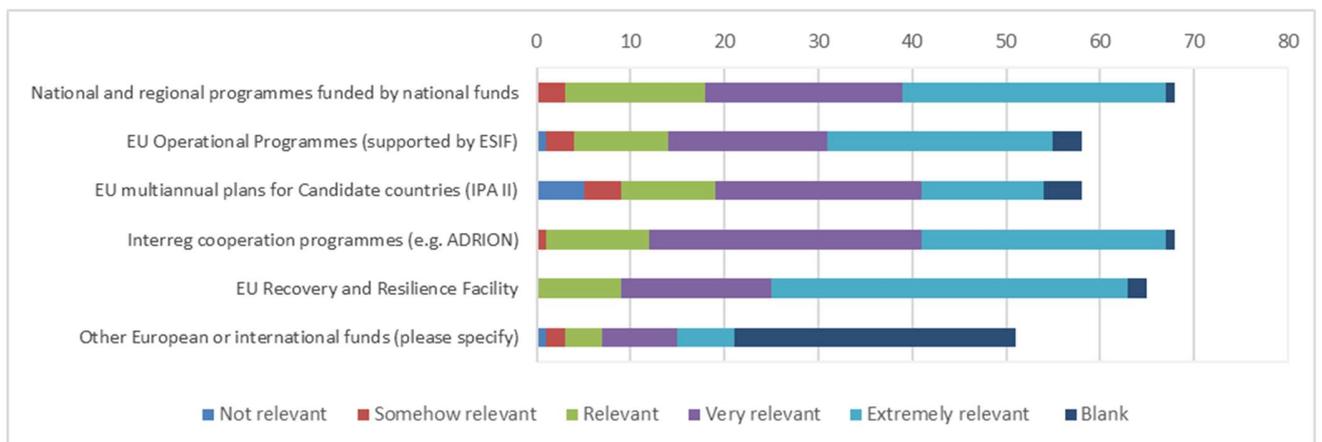
Figure 17: Experience with programmes/funds to finance your activities or projects



Source: Survey 2021, ADRIAN Thematic Sub-cluster on Innovation and ADRIAN Branding

These programmes will continue to play an important role in the development of a recovery strategy in the coming years, including the EU Recovery and Resilience Facility (see Figure 18).

Figure 18: Which programmes/funds in your region/country could be relevant in the next years for the development of a recovery strategy?



Source: Survey 2021, ADRIAN Thematic Sub-cluster on Innovation and ADRIAN Branding

These programmes and funds are expected to contribute to:

- exchanging information, good practices, common innovative models between stakeholders in the ADRION region.
- creating and applying new and innovative models of developing tourism and cultural tourism products. This was highlighted by different stakeholders such as public administration (e.g. in Albania, Greece, Slovenia, Greece, Italy etc.), public development agencies (e.g. in Albania, Serbia, Croatia, etc.), NGOs (e.g. in Bosnia and Herzegovina, Croatia), international organisation, private body, research-higher institutions (e.g. in Italy, Greece, Serbia, etc.).
- designing new and innovative management models and strategies including risk and capacity assessments,
- developing strategies and master plans,
- designing and supporting new safety standards in the public and private sector,
- trainings for public and private stakeholders on sustainable tourism, and new competences for the tourism destinations management,
- designing programme/actions to develop digital skills,
- diversifying the tourism offer, developing and promoting outdoor content, targeting new visitors,
- supporting intersectoral cooperation in promoting and developing innovation for digital and green transition,
- launching common innovative models and applying pilot actions with an interregional approach to enhance mobility,
- promoting public/private cooperation schemes,
- investing in multimedia and in the digitisation of tangible and intangible cultural heritage; organisation of events,
- supporting start-ups in tourism and green economy,
- financing structural investments,
- supporting ICT and connectivity,
- improving accessibility and infrastructure,
- creating travel corridors in the region,
- helping stakeholders to better adapt to similar situations in the future,

- and restructuring activities in the event of such situations,
- developing recommendations for policy change,
 - government extended aids for tourism,
 - supporting private sector to promote the sustainable development of tourism. In this context, raising awareness and information about EU funding and its whole process are considered relevant.

In some countries stakeholders identify specific contributions per each type of programme. For example, in Slovenia national and regional programmes funded by national funds should help the government to extend temporary emergency aid for tourism and hospitality industry. EU Operational Programmes are suggested to be more flexible in moving resources within an OP across different investment priorities to ensure better allocations of funds during the time of its implementation. Interreg programmes should allow peer regions that either face the same challenges or have already found successful solutions for overcoming them to cooperate closely and transfer good practices. The EU Recovery and Resilience Facility should help finance key investment and reform measures outlined in the country's recovery and resilience plan, especially in tourism and sustainable mobility.

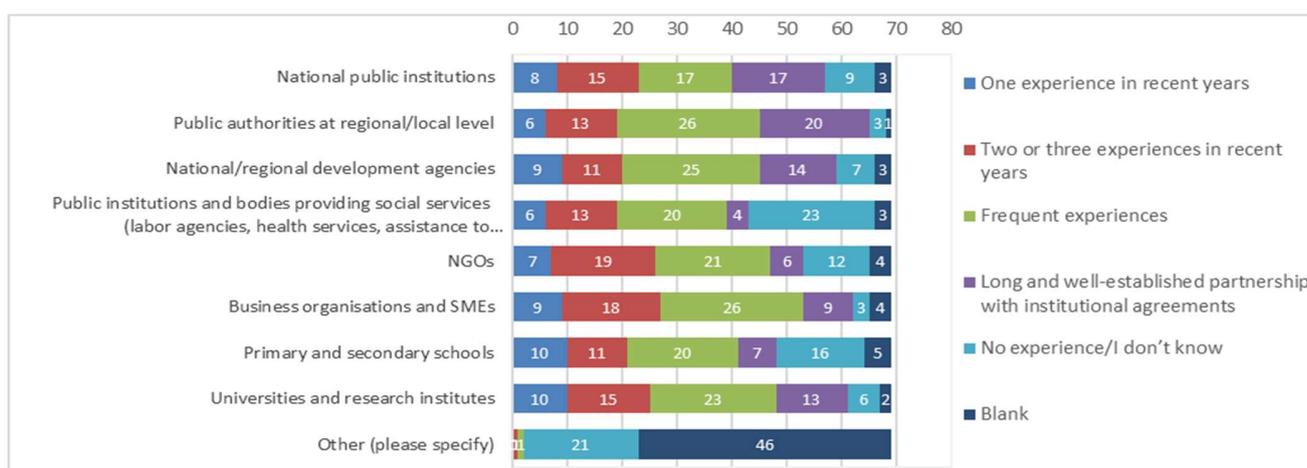
In Greece, national and regional programmes funded by national funds are considered important for the smart specialisation in the tourism sector, sustainable development actions planning and policy co-creation; EU Operational Programmes supported by ESIF for the development of new forms of tourism (gastronomic, agro-tourism, health, cruise/yachting, winter, experience, etc.), expanding the tourism season and connecting tourism with local agriculture, food, science, culture and craft sectors; Interreg cooperation programmes (e.g. ADRION) for the exchange of good practices and pilot actions; and the EU Recovery and Resilience Facility for investments in green and smart recovery.

Regarding their experience in cooperation programmes/projects, most of the respondents from the ADRION countries (over 80%) have at least one

experience with various types of organisations such as with public authorities at regional/local level (96% of respondents²⁰), with national public institutions (86%), national/regional development agencies (89%), business organisations and SMSs (95%), universities and research institutes (91%) and NGOs (82%).

A slightly lower level of cooperation is reported with public institutions and bodies providing social services (labor agencies, health services, assistance to elders, etc) (65%) and to some extent with primary and secondary schools (75%) (see Figure 19).

Figure 19: Have you had experiences in terms of project and/or programmes partnerships with any of the following organisations?



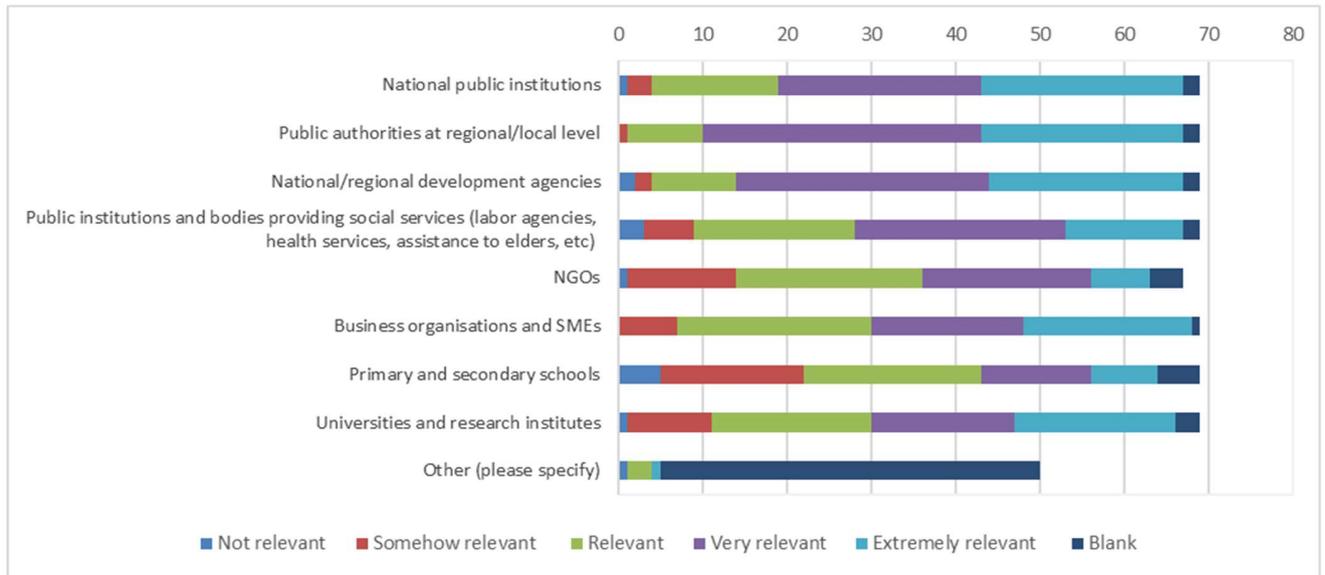
Source: Survey, 2021, ADRIAN Thematic Sub-cluster on Innovation and ADRIAN Branding

In the context of Interreg transnational cooperation and the efforts to improve the resilience and sustainability of tourism in the post-COVID-19 scenario, the most relevant types of organisations are considered:

- Public authorities at regional/local level,
- National/regional development agencies,
- National public institutions.

²⁰ The calculations exclude “blank” answers

Figure 20: In the context of Interreg transnational cooperation programmes (i.e. ADRIAN), which type of organisations are mostly needed to improve resilience and sustainability of the tourism sector in the post COVID scenario?



Source: Survey 2021, ADRIAN Thematic Sub-cluster on Innovation and ADRIAN Branding

Public authorities are considered relevant as they make final decisions regarding tourism development and provide financial and technical support. A direct and constant relationship between the central government and the regions is underlined to invest in a common vision and share projects over the medium and long term. National and regional development agencies are also needed during the implementation of projects and involve stakeholders.

In addition, NGOs and business support organisations should ensure data on real needs and situations. They also contribute together with universities and research institutions in the development of good strategies for the recovery and provide policy recommendations based on their experience and knowledge. National tourism boards, GLAMs (galleries, libraries, archives, museums) and other cultural institutions are also key stakeholders to be considered since they often suffer from the lack of skilled staff and budget for innovative services. On

the other hand, private enterprises are key to promote innovations and develop new services and products. Moreover, businesses could provide inputs for policy recommendations and opinions on how to improve the sustainability of the sector.

Overall, an integrated approach with input and support from industry and civil society is necessary to both respond to the opportunities and address the multi-faceted challenges faced by the tourism sector. Coordination in the development and delivery of a tourism policy is required not only horizontally at national level but also vertically between the central government, regions and local destinations that receive the visitors and help create the experience on the ground.

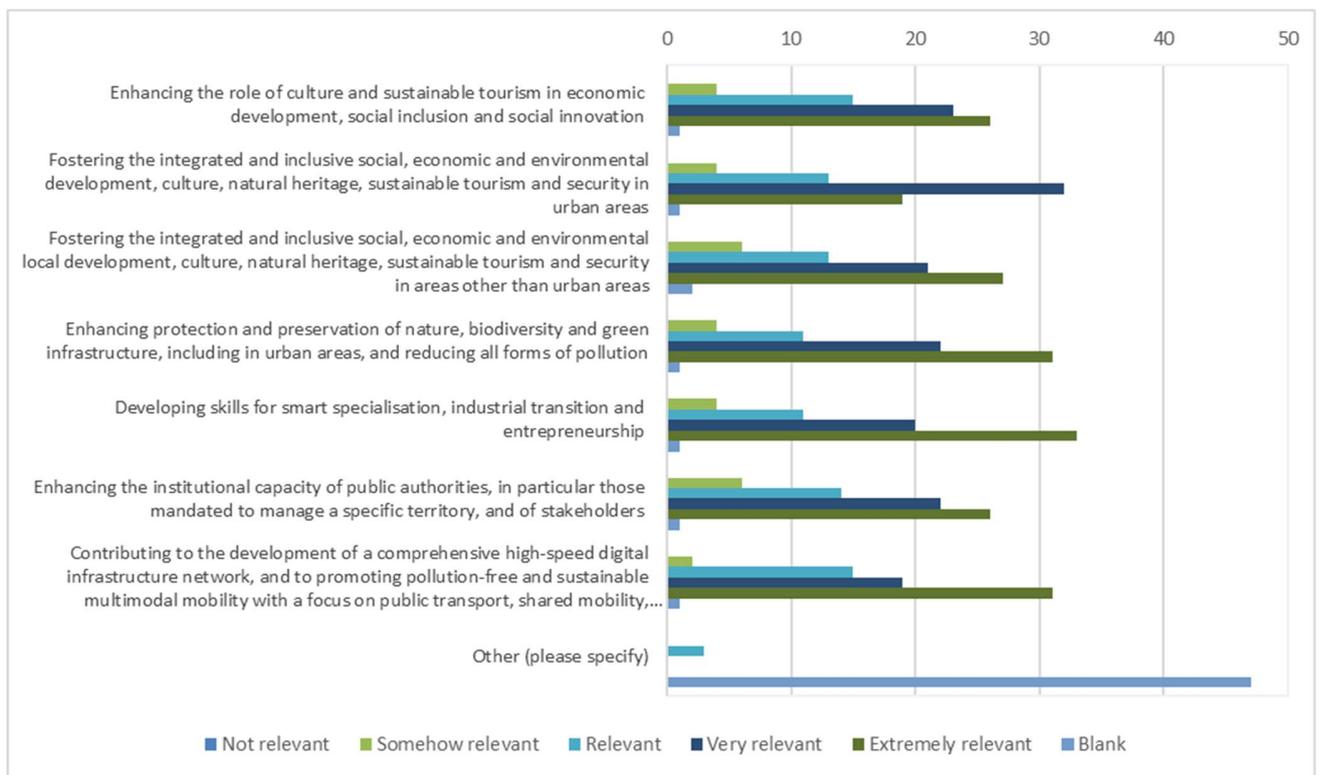
The importance of effective governance and destination management, including marketing and product development, is increasingly underlined in country strategies to promote sustainable tourism. This can be facilitated by the presence of regional and local bodies that are able to plan and take action within destinations. Yet again, there is a strong need for a partnership approach at this level bringing together local government and businesses and enabling the representation of local communities and other interests.

In the framework of the programming period 2021-2027 and the new policy and specific objectives for the Interreg programmes, the following objectives are considered as extremely relevant for the development of sustainable tourism (including cultural tourism):

- P01/SOiv: Developing skills for smart specialisation, industrial transition and entrepreneurship (highlighted as a prerequisite for any kind of development),
- P02/SOVii: Enhancing protection and preservation of nature, biodiversity and green infrastructure, including in urban areas, and reducing all forms of pollution,
- P05/SOii: Fostering the integrated and inclusive social, economic and environmental local development, culture, natural heritage, sustainable

tourism and security in areas other than urban areas.

Figure 21: Referring to the new ERDF and Interreg Regulations, in your opinion which objective (s) would be more relevant for the development of sustainable tourism?



Source: Survey 2021, ADRIATIC-IONIAN Thematic Sub-cluster on Innovation and ADRIATIC-IONIAN Branding

Significant is also considered the contribution to the development of a comprehensive high-speed digital infrastructure network, and to promoting pollution-free and sustainable multimodal mobility with a focus on public transport, shared mobility, walking and cycling, as a part of the transition to the net-zero carbon economy²¹.

Other objectives considered as very relevant focus on:

²¹ This is not a specific objective (SO) listed in the ERDF Regulation (Art.3) or in the Interreg Regulation, but it is mentioned as a key contribution of the ERDF (ERDF Regulation, Recital 12).

- P04/SO vi: Enhancing the role of culture and sustainable tourism in economic development, social inclusion and social innovation,
- P05/SOii: Fostering the integrated and inclusive social, economic and environmental development, culture, natural heritage, sustainable tourism and security in urban areas,
- ISO1/a: Enhancing the institutional capacity of public authorities, in particular those mandated to manage a specific territory, and of stakeholders.

While these objectives cover various topics (e.g skill and capacity development, protection and preservation of nature, biodiversity and green infrastructure, etc), a necessary integrated approach covering different sectors in addition to tourism and culture (i.e. environment, sustainable transport, health, innovation and digitalisation, education, social inclusion and integration, agriculture etc.) is highlighted to promote the sustainable tourism development.

In this context, a close dialogue between the public and private sector and civil society is stated as important in the development, implementation and monitoring phases. This would help to identify solutions that deliver stability and promote economic growth, quality jobs and sustainable development in the ADRION area.

2.2 Key needs and opportunities

This section identifies the key needs of the ADRION region and stakeholders as well as the opportunities in supporting the restart after the COVID-19 pandemic and the promotion of cultural and sustainable tourism. The results are based on the findings and analyses carried out in the previous sections.

Key needs:

- **Digitalisation:** Increasing the level of digitalisation in the tourism sector
- **Skill development/capacity building:** Upskilling and re-skilling the workforce in the private and public sector in the tourism sector

- **Entrepreneurship and innovation:** Enabling entrepreneurship and innovation to promote sustainable practices and innovative products and services in the tourism sector
- **Diversification and customization:** Diversifying and customizing the (cultural) tourism offer to new emerging needs
- **Safety and security:** Improving the safety and health measures in the tourism sector to address current and future needs
- **Sustainable mobility:** Making tourism (including cultural tourism) more accessible through structural investments and innovative services for sustainable mobility
- **Protection and preservation:** Enhancing protection and preservation of natural and cultural resources exploited for touristic activities
- **Accessible and inclusive tourism:** Developing and applying an integrated approach involving different sectors (e.g. health, sustainable mobility, etc.) and stakeholders to ensure accessible and inclusive tourism services and products.

Key opportunities:

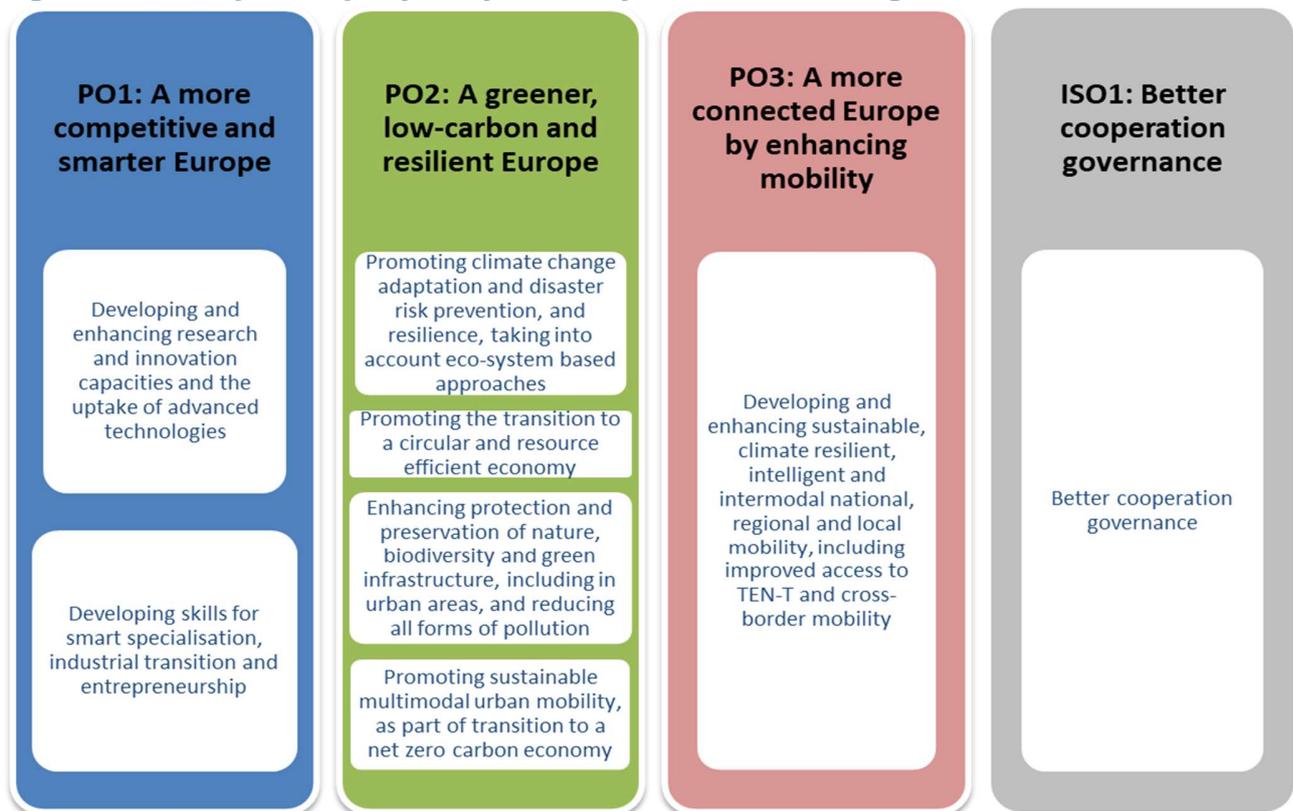
- Untapped potential especially in lesser-known local and rural destinations,
- Higher awareness on environmental protection and sustainable practices,
- Higher awareness on digitalisation and innovation,
- Higher awareness on safety and health standards,
- Increased support from National and EU programmes for cultural industries and sustainable tourism sectors.

Addressing these needs and exploring opportunities arising at global, regional and local level would help the ADRION region to not only recover and restart after the pandemic, but to also strengthen the role of sustainable tourism in promoting sustainable and inclusive economic growth, fostering innovation and providing benefits for all.

3. Joint strategic actions for a sustainable tourism sector in the ADRIAN region after the COVID-19 pandemic

Chapter 3 proposes some key actions to help address the needs and opportunities for a sustainable post-pandemic recovery (identified in chapter 2) as well as to emphasize the role of cultural tourism and promote sustainable tourism. The draft ADRIAN Programme 2021-2027 and the objectives proposed by the Joint Task Force (JTF) are considered for the recommendations in order to ensure coherence and effective implementation of the proposed strategic actions.

Figure 22: Policy and specific objectives of the ADRIAN Programme 2021-2027



Source: ADRIAN website²²

²² www.adriainterreg.eu/index.php/about-program/programme/towards-the-new-adriana-view-ahead-on-the-next-programming-period-2021-2027/

While the specific objectives selected by the JTF are not the main objectives that explicitly address cultural tourism or sustainable tourism (as those under PO5 or PO4/SOvi), they are however closely linked to the tourism sector and can support actions needed for its recovery and sustainable development.

3.1 Proposed actions

A number of actions are proposed to support and promote cultural and sustainable tourism (*see*

Figure 23 below) based on the key needs and opportunities identified in chapter 2 related to:

- Digitalisation
- Skill development/capacity building
- Entrepreneurship and innovation
- Diversification and customization
- Safety and security
- Sustainable mobility
- Protection and preservation of natural and cultural resources
- Accessible and inclusive tourism

In addition, in line with the selected policy and specific objectives of the draft ADRION Programme 2021-2027, relevant policy objectives are proposed which could take up and support the implementation of these actions.

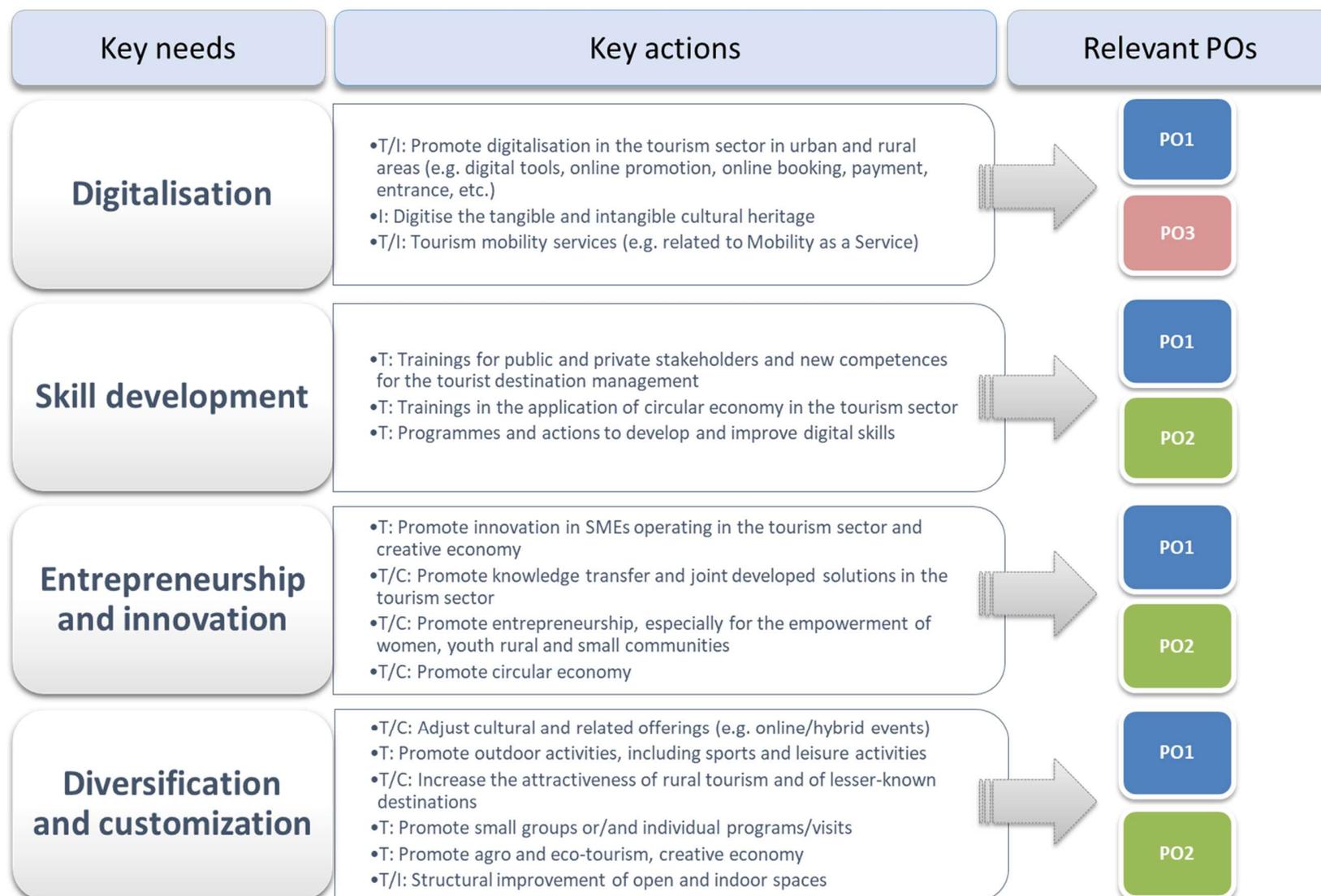
Considering that the programming process of the ADRION Programme 2021-2027 is still ongoing at this point in time (end of December 2021) and the types of actions are yet to be provided by the programming group, the actions proposed in this policy paper cover various topics related to sustainable tourism without placing special emphasis on specific topics/actions. However, it can be expected that some of these actions may be either covered by the future actions of the ADRION Programme or could be proposed to be integrated into the new programme. Other national and EU programmes listed in chapter 2 can also contribute to their implementation.

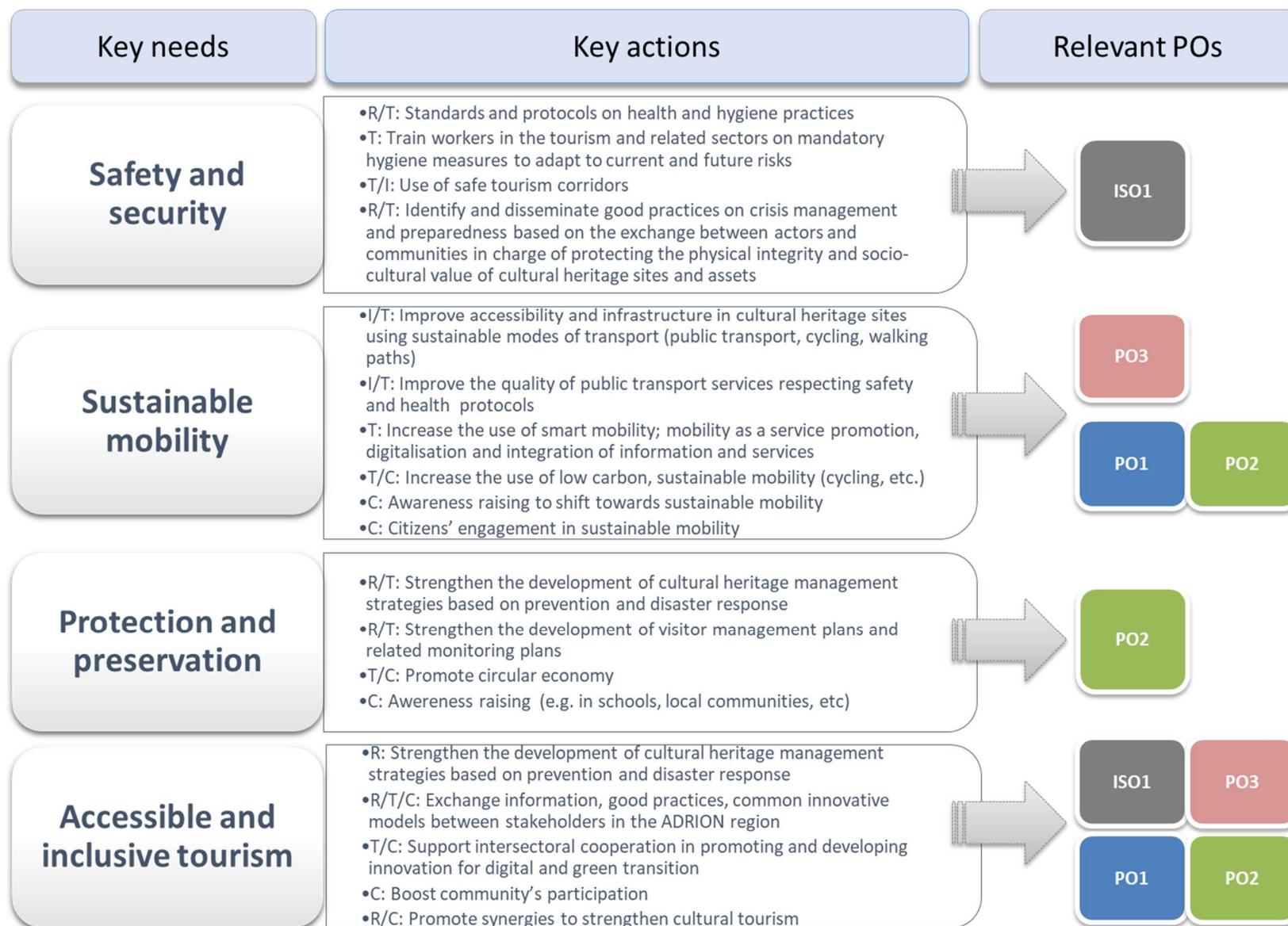
The actions proposed are classified into four main types of actions addressing:

- **R: Regulatory and policy framework** (e.g. policy or strategy development, data collection etc)
- **T: Technical aspects** (e.g. skill development, research, study visits, joint developed solutions, improvement of products and services etc.)
- **I: Investments** (e.g. investments in cultural heritage sites, etc.)
- **C: Communication and networking** (e.g. awareness raising activities, public events etc.)

Abbreviations (R, T, I, C) are used to designate the type of actions in Figure 23 and Figure 24.

Figure 23: Key needs, actions and relevant policy objectives (ERDF & Interreg Regulations)





Source: own elaboration

3.2 Key stakeholders

Referring to the needs and actions presented in section 3.1 and the survey results in chapter 2, key types of stakeholders are listed that are expected to directly contribute to the implementation of the proposed actions and address the needs, and those that will be directly or indirectly affected by them (*see below*).

Figure 24: Key stakeholders contributing or affected by the proposed actions addressing the key needs

Stakeholders directly contributing to the actions	Key needs	Key actions	Stakeholders affected by the actions
Public authorities Cultural institutions and cultural heritage sites Private bodies Public Development Agencies	Digitalisation	<ul style="list-style-type: none"> •T/I: Promote digitalisation in the tourism sector in urban and rural areas (e.g. digital tools, online promotion, online booking, payment, entrance, etc.) •I: Digitise the tangible and intangible cultural heritage •T/I: Tourism mobility services (e.g. related to Mobility as a Service) 	Cultural institutions and cultural heritage sites Private bodies Local communities Visitors
Public authorities Cultural institutions Private bodies, Public Development Agencies Research-Higher Education Business support organisations, NGOs	Skill development	<ul style="list-style-type: none"> •T: Trainings for public and private stakeholders and new competences for the tourist destination management •T: Trainings in the application of circular economy in the tourism sector •T: Programmes and actions to develop and improve digital skills 	Public authorities Private bodies, in particular SMEs
Public authorities SMEs Business support organisations, Research-Higher Education, NGOs	Entrepreneurship and innovation	<ul style="list-style-type: none"> •T: Promote innovation in SMEs operating in the tourism sector and creative economy •T/C: Promote knowledge transfer and joint developed solutions in the tourism sector •T/C: Promote entrepreneurship, especially for the empowerment of women, youth rural and small communities •T/C: Promote circular economy 	SMEs, startups Research-Higher Education Youth, women, local communities Visitors
Public authorities SMEs Business support organisations, Public Development Agencies	Diversification and customization	<ul style="list-style-type: none"> •T/C: Adjust cultural and related offerings (e.g. online/hybrid events) •T: Promote outdoor activities, including sports and leisure activities •T/C: Increase the attractiveness of rural tourism and of lesser-known destinations •T: Promote small groups or/and individual programs/visits •T: Promote agro and eco-tourism, creative economy •T/I: Structural improvement of open and indoor spaces 	Cultural institutions and cultural heritage sites Private bodies Local communities Visitors



Stakeholders directly contributing to the actions	Key needs	Key actions	Stakeholders affected by the actions
<p>Public authorities Cultural institutions and cultural heritage sites Private bodies International organisations NGOs</p>	<p>Safety and security</p>	<ul style="list-style-type: none"> •R/T: Standards and protocols on health and hygiene practices •T: Train workers in the tourism and related sectors on mandatory hygiene measures to adapt to current and future risks •T/I: Use of safe tourism corridors •R/T: Identify and disseminate good practices on crisis management and preparedness based on the exchange between actors and communities in charge of protecting the physical integrity and socio-cultural value of cultural heritage sites and assets 	<p>Cultural institutions and heritage sites Private bodies Local communities Visitors</p>
<p>Public authorities Private bodies International organisations</p>	<p>Sustainable mobility</p>	<ul style="list-style-type: none"> •I/T: Improve accessibility and infrastructure in cultural heritage sites using sustainable modes of transport (public transport, cycling, walking paths) •I/T: Improve the quality of public transport services respecting safety and health protocols •T: Increase the use of smart mobility; mobility as a service promotion, digitalisation and integration of information and services •T/C: Increase the use of low carbon, sustainable mobility (cycling, etc.) •C: Awareness raising to shift towards sustainable mobility •C: Citizens' engagement in sustainable mobility 	<p>Cultural institutions and cultural heritage sites Private bodies Local communities Visitors</p>
<p>Public authorities Public Development Agencies Private bodies Schools, Universities</p>	<p>Protection and preservation</p>	<ul style="list-style-type: none"> •R/T: Strengthen the development of cultural heritage management strategies based on prevention and disaster response •R/T: Strengthen the development of visitor management plans and related monitoring plans •T/C: Promote circular economy •C: Awareness raising (e.g. in schools, local communities, etc) 	<p>Cultural institutions and cultural heritage sites Private bodies Local communities Visitors</p>
<p>Public authorities Private bodies Business support organisations, Public Development Agencies Research-Higher Education NGOs, etc.</p>	<p>Accessible and inclusive tourism</p>	<ul style="list-style-type: none"> •R: Strengthen the development of cultural heritage management strategies based on prevention and disaster response •R/T/C: Exchange information, good practices, common innovative models between stakeholders in the ADRION region •T/C: Support intersectoral cooperation in promoting and developing innovation for digital and green transition •C: Boost community's participation •R/C: Promote synergies to strengthen cultural tourism 	<p>Public authorities Cultural institutions and cultural heritage sites Private bodies Local communities Visitors</p>

Source: own elaboration

Conclusions

The ADRION Cluster “Innovation through new methodological approaches and models and ADRION branding’ has prepared this policy paper putting together experiences, knowledge and expectations of a large number of stakeholders in the tourism sector, especially for tourism based on local resources, and aiming for sustainable development of the Adriatic and Ionian (ADRION) macro region.

The survey on which the analysis is carried out and the recommendations are provided served as a key source of information on the impact of the COVID-19 pandemic in the ADRION region and on the innovative initiatives that stakeholders identified for the future territorial cooperation in the area.

The pandemic has caused short-term damages and long-term structural impacts on the tourism sector. The recovery is expected to be long and difficult, and according to the stakeholders’ input, it cannot rely only on the reconstruction of past activities or the restart of tourism as it was before the pandemic.

Based on their feedback and the analysis conducted, the key needs which should support the sustainable development of tourism in the ADRION region for the programming period 2021-2027 are:

- Digitalisation
- Skill development/capacity building
- Entrepreneurship and innovation
- Diversification and customization
- Health Safety and Security
- Sustainable mobility
- Protection and preservation of natural and cultural resources,
- Accessible and inclusive tourism.

The EU programmes that are now being drafted, including the new Interreg ADRION Programme 2021-2027, will offer a strategic financial framework for addressing these common needs and objectives.

The new programming framework for the ERDF and Interreg Programmes and particularly for the ADRION programme focuses on fundamental policy objectives such as those of a more competitive, greener and connected Europe and better cooperation governance.

While the selected objectives for the ADRION Programme 2021-2027 (PO1, PO2, PO3, ISO1) do not explicitly address cultural and sustainable tourism, they do not exclude this sector. Instead, they push tourism as well as other sectors to identify and pursue those sector objectives that contribute and benefit from joint actions in related fields such as in research and innovation, digitalisation, sustainable mobility and environment, among others.

In this context, public and private stakeholders which are active in the tourism sector will face at the same time larger financial opportunities and higher challenges in preparing new projects that should be more interdisciplinary, more integrated as well as more innovative.

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