



Annex document: Assessment of Policy Initiatives and Case Studies

Study on Regional impacts of the COVID-19 crisis
on the tourist sector

(CCI 2020CE16BAT074)

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August 2021



The study

This is a working document related to the study on Regional impacts of the COVID-19 crisis on the tourist sector (CCI 2020CE16BAT074).

The study assesses how different tourist regions are affected by COVID-19 and potential future developments. The study combines analysis of territorial diversity and the economic importance of tourism (and its prospects) with the territorially diverse impacts of the COVID-19 pandemic as well as policy responses and recovery measures. There is also a time dimension, as the impacts differ territoriality between what we have seen so far (holiday seasons with travel restrictions) and what expect to see in the short- and medium-term. The findings on impacts of the pandemic and lessons learned from policy responses will be developed into policy recommendations to help tourism regions adapt for the future.

The study runs from November 2020 until August 2021.

The study is led by Spatial Foresight in cooperation with t33, AnySolution and NECSTour as sub-contractors.

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Regional impacts of the COVID-19 crisis on the tourist
sector

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1 Introduction and task description

The Study on Regional impacts of the COVID-19 crisis on the tourist sector presents an analysis of data sources and studies quantifying the tourism sector, including data sources and studies showing the impact of COVID-19 on tourism. It analyses different characteristics, for example, the size and economic importance of the tourist sector in the different European regions. The interim report proposed a typology of tourist regions in Europe according to different regional dynamics. Medium- and long-term trends in the tourism sector have been analysed, as well as regional and national measures and strategies to support tourism in recent years. Moreover, the interim report has analysed the impact of the COVID-19 crisis on European regions, in particular the exposure and sensitivity to the short- and medium-term effects of travel restrictions, lockdowns etc. The report also analysed the response of the tourism sector to the COVID-19 pandemic, so far.

Task 3 of the study refers to the 'assessment of policy initiatives'. This annex document presents the analysis of 89 policy initiatives addressing key issues and challenges in tourism (e.g. digitalisation, sustainability, resilience, quality, circular and low-carbon approaches, safe and seamless travel, specific needs of micro and small tourism companies, uptake of activity within the COVID-19 context and after). From those, a selection of 16 cases of representative policy initiatives were analysed, 10 of them in-depth. The case study reports are included in the final part of this document.

The aim of this document is twofold. First, to present the results of the assessment of policy initiatives and, in particular, selected case studies. Second, to draw conclusions on the analysis of policy initiatives in the context of the upcoming Multiannual Framework for EU Cohesion Policy.

2 Database on policy initiatives to respond to key tourism issues and challenges

Many EU Member States and regions in recent years defined specific strategies and action plans to support the tourism ecosystem and to address specific challenges and factors of competitiveness such as digitisation, less carbon, safe and seamless, circular tourism, depopulation, seasonality, environmental effects, quality.

89 policy initiatives to promote sustainable and resilient tourism have been identified in the course of this study. There is a mix of national, regional, and local initiatives. Initiatives under Draft Recovery and Resilience Plans are also considered as well as transnational and cross-border measures.

The initiatives cover different areas of intervention. Most of them are dedicated to 'Destination Management and Governance', 'Business/SME Support' and to more and better 'Partnerships'.

Table 2.1 Overview of policy initiatives in database

| Area of Intervention | National | Regional | Local/ Destination | From RRP Drafts* | Trans- national or cross- border | Other |
|--|-----------|-----------|-----------------------|---------------------|---|----------|
| Destination Management and Governance | 9 | 14 | 5 | - | 5 | - |
| Business Support, SMEs and Entrepreneurship | 7 | 4 | 2 | - | 1 | - |
| Partnerships | 5 | 2 | 2 | - | 3 | 1 |
| Research, Innovation and Technology | - | 5 | - | - | 3 | 1 |
| Infrastructure | - | 1 | 4 | - | - | - |
| Regulation, taxes or other legal instruments | 2 | 2 | - | - | - | - |
| Skills and Talent | - | 3 | - | - | 1 | - |
| Combined actions | 1 | - | - | 5 | - | - |
| Other | - | - | 1 | - | - | - |
| TOTAL | 24 | 31 | 14 | 5 | 13 | 2 |

*RRP = Recovery and Resilience Plans

24 initiatives are directly related to the COVID-19 pandemic and have been defined in 2020 or later – these initiatives focus on short-term response to direct COVID-effects. 65 policy initiatives are not or only partially related to COVID-19. They have a medium or long term focus on relevant future trends or challenges in tourism.

Most policy initiatives are horizontal and address aspects that could be relevant for any type of tourism region. Some policy initiatives, however, can be linked to the different types of tourism regions that have been defined in earlier phases of the study. Some of the initiatives are targeting a specific type of tourism region, for example, initiatives to make tourism more sustainable for destinations that suffer from over-tourism usually target regions 'Sea Breeze' or 'Beach Beauty'. Measures that want to promote eco-

destinations or a sustainable and responsible rural tourism seem to be more suited for 'Jagertee' or 'Spritz' tourism destinations.

Table 2.2 Policy initiatives according to tourism region types

| Type of Tourism Region | COVID-related | No link/indirect link to COVID |
|------------------------|---------------|--------------------------------|
| Relevant for all types | 16 | 22 |
| Beach Beauty | 2 | 13 |
| Sea Breeze | 4 | 19 |
| Jagertee | 2 | 7 |
| Spritz | 4 | 22 |
| Sea meets Sky | 3 | 3 |
| Cosmopolitan | 1 | 16 |

NOTE: Initiatives can address various region types.

Overall, it can be observed that the policy initiatives target different tourism-related challenges and long-term trends. This is particularly true for the initiatives that are not linked to direct measures in response to the COVID-19 crisis. Digitisation, the reduction of negative environmental effects and to improve the quality and effectiveness of tourism destinations are key challenges addressed.

Table 2.3 Policy initiatives according to long-term trends and challenges

| Long-term trend or challenge in tourism | COVID-related | No link/indirect link to COVID |
|---|---------------|--------------------------------|
| Digitisation | 2 | 13 |
| Less Carbon | - | 5 |
| Safe and seamless | 4 | 2 |
| Circular Economy | - | 2 |
| COVID-Health | 8 | - |
| Environmental Effects | - | 19 |
| Quality and Effectiveness | 2 | 16 |
| Accessibility | - | 3 |
| Various | 8 | 5 |

NOTE: Initiatives can contribute to various challenges.

Below we include an excerpt of the database to give an example of the preliminary results.

Regional impacts of the COVID-19 crisis on the tourist sector

| # | Member State or country | Name of Initiative in EN | General Information | | | | Implemented/foreseen Activities | COVID |
|----|-------------------------|--|---------------------|-----------------------|---|-------------------------------|--|----------------------------------|
| | | | Level | Location, region | Area of Intervention | Relation to larger challenges | | Initiative COVID related or not? |
| 1 | Spain | Methodology and Certificate 'Smart Tourism Destination' | National | Destinations in Spain | Destination Management and Governance | Quality and Effectiveness | The Smart Tourist Destination methodology is based on the analysis of the destinations around five axes and 400 | No |
| 2 | Global | SUNx - Strong Universal Network | Destination | not place-based | Other | Less Carbon | SUNx - Strong Universal Network - is a new system for Tourism destinations and stakeholders to build Climate | No |
| 3 | Spain | Sustainable Tourism Tax | Regional | Balearic Islands | Regulation, Tax etc. | Environmental Effects | Since 2016, Balearic Islands have a sustainable tourism tax paid by residents and tourists for each stay in tourist | Partially |
| 4 | United Kingdom | Rural Tourism Infrastructure Fund | Regional | Scotland | Infrastructure | Less Carbon | Financial support as leverage for investment and stimulus for collaboration. Projects that receive support shall reduce | No |
| 5 | Belgium | GeoChallenge | Regional | Wallonie | Skills and Talent | Digitisation | Competition to develop applications and digital services that use geospatial data; four themes (mobility, | No |
| 6 | Finland | Regional COVID19 Tourism Risk Assessment Model based on Customer Journey | Regional | Lapland | Destination Management and Governance | COVID-Health | Along the entire tourism value chain, a risk assessment model was set up, so to ensure safe travel to / in Lapland. | Yes |
| 7 | EU-wide | Tourism of Tomorrow Lab | Trans-National | Andalucía etc. | Research, Innovation and Technology | Digitisation | Part of the "The Digitalisation and Safety for Tourism Partnership" S3 Thematic platform Partnership project. Aim is | No |
| 8 | Germany | Study on Smart Destinations in National and Nature Parks of Northrhine-Westfalia | Regional | Nordrhein-Westfalen | Research, Innovation and Technology | Digitisation | The Study will be carried out by Institut für Tourismus- und Bäderforschung in Nordeuropa (NIT) in Kiel until May 2021. | Partially |
| 9 | Spain | Professionals from the tourism sector for the regeneration of the tourism sector | National | Spain | Partnerships | Quality and Effectiveness | TurismoRESET offers a space for collaboration and reflection to share experiences and opinions, contribute with | Yes |
| 10 | Trans-National | INCIRCLE Interreg Med Project | Trans-National | | Research, Innovation and Technology | Circular Economy | The main objective of the project is to improve the attractiveness of island and low-density areas by means of | No |
| 11 | France | Roadmap for greener tourism | Regional | Corsica | Destination Management and Governance | Environmental Effects | The recovery strategy includes short and long-term measures. In the short-term, measures include the | Partially |
| 12 | Denmark | Tourism Restart Team Forum | National | Denmark | Partnerships | Safe and seamless | The Tourism Restart Team is one of eight teams tasked with bringing forward proposals and recommendations for | Yes |
| 13 | Slovakia | Sustainable Tourism Development Strategy to 2030 | National | Slovakia | Destination Management and Governance | Various | Stimulate tourism innovation, support data-driven destination development, promote sustainable mobility. | Yes |
| 14 | Lithuania | E-business model' tool | National | Lithuania | Business Support, SMEs and Entrepreneurship | Digitisation | The 'E-business model' tool will be used to finance new business models created via introducing e-business | Not clear |
| 15 | Slovenia | Green Scheme of Slovenian Tourism (GSST) | National | Slovenia | Business Support, SMEs and Entrepreneurship | Environmental Effects | The GSST is a tool and certification program for sustainable tourism in Slovenia, it offers evaluation and improvement | Partially |
| 16 | Denmark | Visit Denmark | National | Denmark | Destination Management and Governance | Digitisation | Create a more holistic tourism product mainly building on online and digital services to increase the branding of | No |
| 17 | Finland | Roadmap for growth and renewal in Finnish tourism | National | Finland | Destination Management and Governance | Digitisation | Applying digitalisation in building a nation-wide digital ecosystem for sustainable growth in travel. Examples are: 1) | No |
| 18 | Austria | Next Level Tourism Austria | National | Austria | Partnerships | Digitisation | As a central innovation hub for the tourism sector, it will focus on complex technological applications and processes | No |
| 19 | Iceland | Travel vouchers for domestic travel | National | Iceland | Regulation, Tax etc. | COVID-Health | Digital voucher to citizens to be used to buy services from domestic tourism companies (as a response to the tourism | Yes |
| 20 | Portugal | Tourism Innovation Centre | National | Portugal | Business Support, SMEs and Entrepreneurship | Digitisation | Created in 2019, NEST is the anchor project for the Tourism 4.0 initiative and will operate from Covilhã in the north of | No |

Annex Final Report

| # | Member State or country | Name of Initiative in EN | General Information | | | | Implemented/foreseen Activities | COVID |
|----|-------------------------|---|---------------------|--|---|-------------------------------|---|----------------------------------|
| | | | Level | Location, region | Area of Intervention | Relation to larger challenges | | Initiative COVID related or not? |
| 21 | France | Welcome City Lab Paris | Local | France | Business Support, SMEs and Entrepreneurship | Digitisation | Welcome City Lab is a programme to stimulate innovation in the tourist sector including the world's first incubator that | No |
| 22 | Greece | Improvement of the tourism value chain's cohesion and integration through the Crete's | Regional | Crete | Research, Innovation and Technology | Various | The Smart Specialisation Strategy (S3) 2014-2020 of the Region of Crete embraced the vision of Crete's | No |
| 23 | Spain | A collaborate platform for sharing information on accessibility in tourist | Destination | National, example Valencia | Partnerships | Accesibility | Setting up the platform; platform available in 10 languages; extension of the platform by involving users/tourists plan to | No |
| 24 | Italy | The Digital Tourism Ecosystem | Regional | Lombardia Region | Research, Innovation and Technology | Digitisation | This ecosystem (platform) collects, harmonises and distributes tourism content related to accommodation, | No |
| 25 | Italy | Strategic Plan for Tourism | National | Different Regions and Destinations in | Other | Various | The Strategic Plan for Tourism (PST) offers the opportunity to implement in full the strategy of providing Italy with a | No |
| 26 | Italy | Covid19-Recovery Actions for Tourism | Regional | Liguria region | Business Support, SMEs and Entrepreneurship | COVID-Health | Thanks to the agreement between the Liguria Region and the banking system, an EUR 5.5 million regional guarantee | Yes |
| 27 | Croatia | Istrian Commision for tourism | Regional | Istria | Destination Management and Governance | COVID-Health | The Commission coordinates its activities with the Regional Task force for civil protection, the Regional Institute of Public | Yes |
| 28 | Italy | Tourism Promotional and Communication Plan | Regional | Tuscany | Business Support, SMEs and Entrepreneurship | Various | The communication campaign is activated in the national media and several other platforms to attract the tourism | Yes |
| 29 | Slovenia | "Now is the time. My Slovenia" | National | Slovenia | Business Support, SMEs and Entrepreneurship | COVID-Health | Short-term measure to counteract the negative effects of travel restrictions during COVID-19. A promotional video has | Yes |
| 30 | Slovenia | Touristic voucher | National | Slovenia | Business Support, SMEs and Entrepreneurship | COVID-Health | Slovenia has approved a tourism voucher scheme by which every adult will receive a EUR 200 voucher while children | Yes |
| 31 | Italy | Destination Management Organisations | Regional | Veneto | Destination Management and Governance | Quality and Effectiveness | The plan establishing Destination Management plans in the Veneto Region is enshrined in the Regional Law 11/2013 | No |
| 32 | Trans-National | S3 Thematic Platform Project: The Digitalisation and Safety for Tourism Partnership | Trans-National | Lead Regions: Andalucia (Spain), Leiland (Finland) | Partnerships | Various | Project with 3 thematic areas (1) access to data, 2) green mobility, accessibility and connectivity, 3) resilience, climate | No |
| 33 | Italy | Sardinian sustainable development and climate change adaptation regional strategy | Regional | Sardinia region | Destination Management and Governance | Environmental Effects | Sustainable Development Regional Strategy (SDRS) is made of 5 pillars (working groups) on the following topics: | Partially |
| 34 | Croatia | Tourism Development Strategy of the Republic of Croatia until 2020 | National | Croatia | Destination Management and Governance | Various | 1.Harmonization and improvement of the legal framework with the aim of strengthening entrepreneurship and | No |
| 35 | Greece | Strategic directions of the National Recovery and Resilience Plan | RRP | Greece | Various | Various | Promotion of eco-tourism. Digitalisation of key sectors such as tourism: Greece has a pre-existing strategic choice in | Yes |
| 36 | Italy | Strategic directions of the National Recovery and Resilience Plan | RRP | Italy | Various | Various | Increase the level of attractiveness of the country by improving the touristic and cultural system through the | Yes |
| 37 | Romania | National Recovery and Resilience Plan | RRP | Romania | Various | Various | Regional Operational Programmes will finance cultural heritage and culture and tourism under priority 6 (An | Yes |
| 38 | Spain | National Recovery and Resilience Plan | RRP | Spain | Various | Various | Tourism is a sector that plays a crucial role in the economy. [...] Sustainable tourism must also support efforts towards | Yes |
| 39 | France | Strategic directions of the National Recovery and Resilience Plan | RRP | France | Various | Various | Examples of projects: • Deployment of bio-waste sorting in the catering sector; • Support for professionals to contribute | Yes |
| 40 | Denmark | Digital corona passport | National | Denmark | Regulation, Tax etc. | Safe and seamless | Denmark's government has said it is joining forces with businesses to develop a digital passport that would show | Yes |

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|----|-------------------------|---|---------------------|-------------------------------------|---|-------------------------------|--|----------------------------------|
| | | | Level | Location, region | Area of Intervention | Relation to larger challenges | | Initiative COVID related or not? |
| 41 | Denmark | Digitalisation of tourism marketing and management in Denmark | National | Denmark | Destination Management and Governance | Digitisation | As an initiative under the national strategy for Danish tourism, VisitDenmark launched its Smart Tourism Strategy | No |
| 42 | Spain | "Accesible Tenerife" App | Destination | Canary Islands | Destination Management and Governance | Accesibility | App developed where the traveller and find updated information on the conditions of accesibility of touristic | No |
| 43 | Spain | Knowledge Portal on Tourism "DATAESTUR" | National | Spain | Destination Management and Governance | Quality and Effectiveness | Integrated Information platform on all available data on tourism activity in Spain which has links to relevant data | No |
| 44 | Spain | MOVITUR Balears | Regional | Balearic Islands | Partnerships | Less Carbon | The project foresaw a network of fast-charging electric stations installed by ENDESA. At least 8 rent-a-car | No |
| 45 | Spain | Walking on Words Project with "WoW! Literary Majorca" App | Regional | Balearic Islands | Destination Management and Governance | Quality and Effectiveness | Walking on words has developed a book and the WOW app, a resource based on augmented reality and geolocation | No |
| 46 | Romania | National Plan for Investments and Economic Recovery | National | Romania | Business Support, SMEs and Entrepreneurship | Various | Tourism sector: Working capital for small and medium enterprises ("SMEs"): Grants of up to € 125,000 for | yes |
| 47 | Cross-border | ALBINA - Avalanche bulletin | Cross-border | Italy-Austria | Destination Management and Governance | Safe and seamless | Development of a multilingual website for the reporting of avalanche risks on a daily basis; dissemination activities | no |
| 48 | Greece | Destination Greece. Health First | National | Greece | Destination Management and Governance | COVID-Health | Serves as an information platform on the safety measures, trip requirements and risk management due to COVID-19 | Yes |
| 49 | Greece | Use of compastible recycle bin | Local | Mykonos island | Infrastructure | Environmental Effects | Easier and more effective waste collection (especially during crowded summer months) | No |
| 50 | Trans-National | Ecotourism Footprint calculator | Trans-National | Mediterranean | Destination Management and Governance | Environmental Effects | DestiMED is a project funded by the Interreg MED Programme and aims at building the pre-conditions for a | No |
| 51 | Trans-National | Bluemed Knowledge Awareness Center | Trans-National | Mediterranean | Research, Innovation and Technology | Environmental Effects | Combining technology and sustainable tourism, underwater museums have been created. The main objective is the | No |
| 52 | Italy | Smart Visualization System Venice | Local | Veneto | Destination Management and Governance | Quality and Effectiveness | For a tourist destination like Venice that is affected by overtourism it is increasingly crucial to be equipped with the | No |
| 53 | Trans-National | MITOMED+ | Trans-National | Mediterranean | Destination Management and Governance | Environmental Effects | With MITOMED+, a Green Beach standard for an eco-beach has been created (a sustainably managed recreational | No |
| 54 | Ireland | Ireland's Ancient East Storytelling Interpretation Investment Scheme | Destination | Waterford, South East Ireland, | Business Support, SMEs and Entrepreneurship | Quality and Effectiveness | Ireland's Ancient East Storytelling Interpretation Investment Scheme in 2017 to transform the quality of interpretation, | No |
| 55 | Germany | Carbon Footprint Calculator for holidays in the Eifel | Destination | Eifel (RLP and NRW) | Destination Management and Governance | Less Carbon | Development of climate-friendly tourism offer for the Eifel destination. A network has been created. A CO2-calculator | No |
| 56 | Spain | Circular Hotels Project | Destination | Mallorca | Partnerships | Circular Economy | Circular Hotels initiative with the purpose of reducing waste and promoting local products, in collaboration with hotel | No |
| 57 | Austria | Tourism Academy | Destination | Salzkammergut, Oberösterreich | Skills and Talent | Various | Usually, tourism-relevant topics are offered in classroom training, far away from the tourism region. Acquiring | Partially |
| 58 | Spain | Digital travel assistant Feasy - Corona Info website Amadeus | Other | not place based | Research, Innovation and Technology | Digitisation | Feasy is a digital travel assistant developed by AMADEUS for real-time information before and during travelling. Feasy | Yes |
| 59 | Italy | Development and sustainability of tourism in Veneto. (new standards 2020) | Regional | Veneto | Destination Management and Governance | Safe and seamless | Update of the regional regulations and new standards for tourist information and reception activities. | Yes |
| 60 | Sweden | ASSL Upgrade Programme 2020 | Regional | Swedish Lapland (Region Norrbotten) | Skills and Talent | Quality and Effectiveness | ASSL Upgrade is a special adaptation of 'Arctic Spirit in Swedish Lapland' (ASSL) which is the destination's own | Partially |

Annex Final Report

| # | Member State or country | Name of Initiative in EN | General Information | | | | Implemented/foreseen Activities | COVID |
|----|-------------------------|--|---------------------|--------------------------------------|---|-------------------------------|--|----------------------------------|
| | | | Level | Location, region | Area of Intervention | Relation to larger challenges | | Initiative COVID related or not? |
| 61 | Estonia | Micro-tunnel for the disposal of wastewater of passenger ships in Tallinn | Local | Tallinn | Infrastructure | Environmental Effects | Until recently, ships were allowed to only discharge a certain amount of wastewater. This limited quantity had | No |
| 62 | Trans-National | EcoDots | Trans-National | Europe | Partnerships | Environmental Effects | EcoDots aimed to connect travellers, small and micro enterprises in the hospitality sector, local communities and | No |
| 63 | Italy | Accesible Beaches in Bari | Local | Bari | Infrastructure | Accesibility | Fully accessible beaches offer adapted paths and beach mats, which allow wheelchair-users and slow waters direct | No |
| 64 | The Netherlands | Smart City Lighting | Local | Breda | Infrastructure | Environmental Effects | Breda is the first city in Europe to use remote control, colour-changing LED technology in its street lighting. This was first | No |
| 65 | Cross-border | Cycling in Alsace (FR-DE) EuroVelo Routes | Cross-border | Alsace | Partnerships | Safe and seamless | 3 EuroVelo Routes cross Alsace (5, 6, 15). Several cross-border cycling routes have been developed and ensure a | No |
| 66 | Croatia | Smart Tourism Initiative | National | Croatia | Partnerships | Digitisation | Digitisation is a term that will mark the tourism sector in the coming years under the imperative of smart tourism or | No |
| 67 | Bulgaria | Smart Tourism Destination Varna | Destination | Varna, Bulgaria | Research, Innovation and Technology | Digitisation | Varna – development of a smart tourism destination: Varna is the third largest city in Bulgaria and the biggest seaside | No |
| 68 | Poland | Polish Ecotourism label and the Ecotourist network between Bug and Narew | Destination | Northern Mazovia region | Destination Management and Governance | Environmental Effects | The label was created by a group of entrepreneurs and tourism business owners that cooperate closely together for | No |
| 69 | Trans-National | CEETO - Sustainable Tourism Governance for Protected Areas | Trans-National | Central Europe | Destination Management and Governance | Environmental Effects | 1. Inventory of Planning/ Management/ Monitoring Tools and success stories for Sustainable Tourism in Protected | No |
| 70 | Romania | Establishment of eco-destinations in Romania | National | Romania | Destination Management and Governance | Environmental Effects | Following the National Ecotourism Strategy, Romania became the first country in Europe to elaborate a system for | No |
| 71 | Global | Hydrothermal Initiative Collaboration Sauna Science Lab | Other | Private, global | Partnerships | Quality and Effectiveness | In this Hydrothermal Initiative Collaboration, leading medical researchers, scientists and sauna experts debated the role | Partially |
| 72 | Finland | Health Travel Finland post 2020 | National | Finland | Partnerships | Safe and seamless | Medical and health tourism is one booming tourism sector for the future. Apart from boasting the cleanest air you can | Yes |
| 73 | Trans-National | Hackathon Miro in Cube | Trans-National | Barcelona, Palma Mallorca, Perpignan | Business Support, SMEs and Entrepreneurship | Quality and Effectiveness | A three day Hackathon will be organised in three locations simultaneously: Barcelona (Hotel), Mallorca (ParcBIT) and | No |
| 74 | Trans-National | Interreg MED Sustainable Tourism Community | Trans-National | Mediterranean | Partnerships | Environmental Effects | The MED Sustainable Tourism Community is featured by BleuTourMed_C3 Project, a three-year Horizontal Project | No |
| 75 | Italy | Association of Sustainable Tourism Operators of the Lagoon of Venice (OTS) | Local | Venezia | Partnerships | Environmental Effects | The Association of Operators of Sustainable Tourism of the Lagoon of Venice (OTS) was born on 12 April 2018 inspired | No |
| 76 | Greece | Crete – first steps towards a sustainable food destination | Regional | Crete | Business Support, SMEs and Entrepreneurship | Quality and Effectiveness | TUI Care Foundation and Futouris successfully complete project on sustainable food production and consumption for | No |
| 77 | Spain | Mar das Illas' FLAG cooperation project | Local | Pontevedra (Galicia) | Business Support, SMEs and Entrepreneurship | Quality and Effectiveness | The Marine and Land National Park of the Atlantic Islands (PNMTIAG), the only national park in Galicia, is one of the | No |
| 78 | Denmark | Tourism for Good - Sustainable Tourism Strategy for Copenhagen | Local | Copenhagen | Destination Management and Governance | Quality and Effectiveness | Work on four focus areas: 1) Broadening tourism: avoid a future where too many visitors overcrowd only a few central | No |
| 79 | Spain | Strategy for the Transformation of the Tourism Model in the Canary Islands | Regional | Canary Islands | Destination Management and Governance | Quality and Effectiveness | The Canarias Destino strategy aims to achieve three objectives for the transformation of the Canary Islands | Yes |
| 80 | Spain | Global Tourism Safety Laboratory | Regional | Canary Islands | Research, Innovation and Technology | COVID-Health | Health safety has become an indispensable image attribute for any tourist destination in the world. The Canary | Yes |

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| # | Member State or country | Name of Initiative in EN | General Information | | | | Implemented/foreseen Activities | COVID |
|----|-------------------------|--|---------------------|------------------|---|-------------------------------|---|----------------------------------|
| | | | Level | Location, region | Area of Intervention | Relation to larger challenges | | Initiative COVID related or not? |
| 81 | Portugal | Miosotis Azores Awards for environmental excellence in tourist accommodation | Regional | Azores | Business Support, SMEs and Entrepreneurship | Environmental Effects | This is an award to recognize environmental excellence in tourist accommodation. It was created in 2012, to | No |
| 82 | Portugal | Sustainability Action Plan for the Azores 2019-2027 | Regional | Azores | Destination Management and Governance | Environmental Effects | The Action Plan is a set of 11 sustainable commitments and 51 actions in different fields (energy efficiency, | No |
| 83 | Spain | Support to tourism SMEs digitalisation | Regional | Andalucia | Destination Management and Governance | Digitisation | Since the outbreak of the pandemic, the technology centre AndaluciaLab has been boosting digital and technological | Yes |
| 84 | Spain | "Grand Tour of Catalonia" as alternative to overtourism | Regional | Catalonia | Destination Management and Governance | Quality and Effectiveness | Grand Tour of Catalonia" is one of the new tourism products the Catalan Tourist Board and the Directorate General for | No |
| 85 | Italy | Plastic Free Toscana | Regional | Toscana | Regulation, Tax etc. | Environmental Effects | In 2019, Regional Parliament of Tuscany adopted a dedicated legislation on Plastic reduction. Since then, the | No |
| 86 | The Netherlands | GREEN tourism development strategy South Limburg | Regional | South Limburg | Destination Management and Governance | Quality and Effectiveness | In 2020, South Limburg developed a Vision for South Limburg Destination 2030 which includes ambitious | No |
| 87 | United Kingdom | Responsible Tourism Plan for Scotland | Regional | Scotland | Destination Management and Governance | Less Carbon | 1. Take action to reduce carbon emissions as an organisation and encourage Scotland tourism industry to | No |
| 88 | Belgium | "Travel to Tomorrow" experience-destination-marketing strategy | Regional | Flanders | Destination Management and Governance | Quality and Effectiveness | New vision that aims for an increase in the net value for everyone involved in tourism. | No |
| 89 | Trans-National | Next Tourism Generation (ERAMUS+) | Trans-National | Across EU | Skills and Talent | Quality and Effectiveness | To create transformative cooperation in five key tourism sub-sectors: hospitality, food and beverage operations, travel | No |

3 In-depth analysis of selected policy initiatives

Based on the identified policy initiatives, 16 cases were identified to analyse details of relevant and representative policy initiatives that cover different EU countries, different types of tourism regions and different areas of intervention. A mix of public and private, national, regional and transnational initiatives will reflect different types of projects and programmes to promote sustainable tourism.

3.1 Overview on selected policy initiatives

From the overall list of 89 policy initiatives, a list of 16 interesting cases was pre-selected based on the following criteria:

- As many European countries as possible are covered in the selection.
- Different tourism region types are covered (e.g. coastal, rural-inland, for further detail, check the tourism types in the interim report)
- The initiatives address at least one key challenge for tourism of the future (e.g. digitisation, less carbon, safe and seamless, circular tourism, depopulation, seasonality, environmental effects, quality) or the COVID-health challenge from a strategic and medium/long-term perspective.
- The initiatives adopt innovative approaches and have a possible positive impact on the overall tourism ecosystem (e.g. in the sense that they involve new types of partnerships, are based on technology or digital solutions, change the organisation of service delivery, foresee more strategic governance etc.) – taking into account that for most policy initiatives there is no information available on achieved results and long-term impact.
- The initiatives are as far as possible representative and can possibly be transferred to other regions/countries.

The final selection covered different areas of interventions and most relevant challenges and trends for future tourism development. Different countries and types of regions were represented. The selected cases addressed diverse governance levels and specific tourism sectors; some were also targeting the complete tourism value chain.

10 of the 16 cases were analysed more in-depth, the detailed case study reports are included in the final part of this document.

The selected policy initiatives are presented below.

Table 3.1 Overview on analysed policy initiatives

| Policy Initiatives | Challenges | Are of Intervention |
|--|--|---|
| Circular Hotels Project, Spain | Environmental Effects Circular Economy | Partnerships |
| EcoBnB Platform | Environmental Effects Less Carbon Circular Economy | Partnerships |
| Tourism Innovation Centre NEST, Portugal | Quality and Effectiveness Digitisation | Business Support, SMEs and Entrepreneurship |

| Policy Initiatives | Challenges | Are of Intervention |
|--|---|---|
| Smart Tourism Destination Varna, Bulgaria | Digitisation Quality and Effectiveness Safe and seamless Environmental Effects | Research, Innovation and Technology |
| Climate-friendly holidays in the Eifel, Germany | Environmental Effects Less Carbon Safe and seamless | Destination Management and Governance |
| Cycling tourism on EuroVelo Routes | Environmental Effects Less Carbon Safe and seamless | Partnerships |
| Grant Scheme for Storytelling, Ireland | Quality and Effectiveness Digitisation | Business Support, SMEs and Entrepreneurship |
| Online Academy Dachstein, Austria | Quality and Effectiveness Digitisation | Skills and Talent |
| Sustainable Cruise Infrastructure, Estonia | Environmental Effects Circular Economy Safe and seamless | Infrastructure |
| Tourism in RIS3, Crete | Environmental Effects Less Carbon Digitisation Quality and Effectiveness Safe and seamless Circular Economy Seasonality | Research, Innovation and Technology |
| Smart Tourism Network, Croatia | Digitisation Quality and Effectiveness | Partnerships |
| Eco-destinations, Romania | Environmental Effects Less Carbon Digitisation Safe and seamless | Destination Management and Governance |
| MOVITUR e-mobility in Mallorca, Spain | Less Carbon Digitisation Safe and seamless | Partnerships |
| Tourism in sustainable regional planning, Sardinia | Environmental Effects Less Carbon | Destination Management and Governance |
| Health and medical Tourism, Finland | Quality and Effectiveness Safe and seamless | Partnerships |
| ASSL training schemes, Sweden | Quality and Effectiveness Digitisation | Skills and Talent |

The map below shows the spatial distribution of cases in Europe.

Map 3-1 Case Studies of Policy Initiatives



Source: Own elaboration

Below there are short summaries of each analysed policy initiative.

The first 10 cases are presented with more detail in individual **case study reports in Annex A** at the end of this document.

| Project Circular Hotels | |
|-----------------------------------|---|
| Country | Spain |
| Region/Destination | Balearic Islands |
| Area of intervention | Partnerships |
| Challenges addressed | Environmental Effects, Circular Economy |
| Relevant for tourism region types | Beach Beauty, Sea Breeze, Jagertee, Spritz, Cosmopolitan |
| Description | <p>The Circular Hotels project is a response to waste issues related to mass tourism on the island of Mallorca. The main goal of the project is to allow tourism to produce concrete positive impacts on local population and on the environment. This project uses waste produced by hotels to transform them, with the support of TIRME, in compost for local farmers who will produce vegetables for those hotels. By adopting this logic, mutual benefits between sectors (tourism, waste management, agriculture) can be produced.</p> <p>An innovative partnership was created between private service provider Wireless DNA, TIRME (regional waste and recycling public service provider) in collaboration with different hotel chains and the island and regional government. The project combines a circular approach with new technology and digitisation of waste collection processes (e.g. measurement sensors and real-time IoT monitoring system). The pilot project was part of a proof of a circular economy concept.</p> <p>The key success factor of the project is the strong willingness, demonstrated by the actors involved, to collaborate, trust each other, and implement this project together. This was essential to reach the desired objectives since the implementation of the circular model required considerable efforts in both economic and organisational terms, impacting their logistics chains. The success of the initiative depended also on the strong commitment to sustainability which allowed to create value for the local products making them greener, and the presence of already suitable and ready-to-use infrastructure (owned by TIRME) such as waste disposal plants, industrial composting facilities and a recycling plant. Finally, the support of the local government was also crucial.</p> <p>The Circular Hotel project activities are in line with the two important objectives of Spanish Tourism transformation. The first objective is to boost a green transition in Spain (including a better waste management), while the second objective aims to boost digital transformation in the country.</p> |
| Expected long-term impact | <p>Promoting Mallorca as Sustainable destination.</p> <p>Implementing circular approaches that reduce waste in touristic hotels and improve the connection between local producers of food and tourists.</p> |
| Lessons | <p>This case shows how regions and their tourism sector can prepare for future trends (circularity) and can recover in the medium and long run from the crisis through investing in more sustainable and resource-efficient tourism models.</p> |
| Relevance for Policy Objectives | <p>1 Smart Europe</p> <p>2 Green Europe</p> |
| Further Information | <p>https://www.tirme.com/es/tirme_melia_iberostar_riu_garden_agromallorca_y_son_march_impulsan_un_proyecto_pionero_de_hoteles_circulares_04f517.html</p> |

| EcoBnB Platform for sustainable tourism | |
|---|---|
| Country | Based in Italy but active in 55 countries (in particular southern Europe) |
| Region/Destination | -- |
| Area of intervention | Partnerships |
| Challenges addressed | Environmental Effects, Less Carbon, Circular Economy |
| Relevant for tourism region types | Beach Beauty, Sea Breeze, Jagertee, Spritz, Cosmopolitan |
| Description | <p>The EcoBnb green accommodation website is a spin-off of an EU project (EcoDots). EcoDots and the EcoBnB Platform aim to connect travellers, small and micro enterprises in the hospitality sector, local communities and itineraries sharing a close link to the concept of sustainable and quality tourism. The project brought together a European network of eco-friendly independent accommodations and itineraries situated in Italy, Austria, Switzerland, Germany, Slovenia and Serbia. Thanks to web and mobile applications, travellers can discover and book eco-sustainable accommodations all around Europe. At the same time, local sub-networks of entities already practicing responsible ecotourism are able to deploy their potential by leveraging interconnections, ideas and the visibility afforded by the EcoBnB website www.ecobnb.com.</p> <p>The success factor of the project was bringing together three important initiatives and elements for EcoBnB: market recognition (with the Viaggi Verdi embryo), standards, community and itineraries for the sustainable accommodation owners to get recognition and certification (TourCert initiative) and the web architecture (former e-Turist initiative).</p> <p>The durability of EcoBnB is also the result of the effort by its partners to find new sources of funding after the end of the EcoDots EU project and to make the platform increasingly self-sustained (through the fees paid by its members).</p> <p>Another success factor is the creation of a EcoBnB community of green suppliers, facilitating the hosts the "greening" of their accommodation and services, as well as bringing more green companies on board along the tourism value chain.</p> <p>In the same context EcoBnB has managed to become a platform of platforms and establishing linked with other sustainable initiatives (sector and national ones), such as Green Sail, Green Key, Slovenia Green, Dalmatia Green, Bla Bla Cars, HowManyTrees. This has helped to build critical mass and to expand the number of cross-references in Internet and social media.</p> |
| Expected long-term impact | More eco-friendly and responsible tourism, better integration of eco-friendly tourist services. New tourism business models. Safe and seamless travel for responsible tourists. |
| Lessons | <p>This case shows how successful initiatives for sustainable tourism can be created and supported by the public sector, supporting the main elements of such an initiative, in this case: market recognition, standards, community and itineraries as well as web architecture and digital tools.</p> <p>Five years after the end of the EcoDots project, the EcoBnB platform has shown a strong capacity to sustain itself over time, having continued the project activities and found new source of financing, i.e. through the regional Rural Development Plan (EAFRD) and the ERDF operational programme (PO-FESR Provincia Autonoma di Trento) as well as subscription quota. The web platform has shown a capacity to reach international targets considering that 13% of its visitors comes from the USA, and that the initiative has been awarded at international level.</p> |
| Relevance for Policy Objectives | <p>1 Smart Europe</p> <p>2 Green Europe</p> <p>5 A Europe closer to the citizens</p> |
| Further information | www.ecobnb.com |

| Tourism Innovation Centre NEST | |
|-----------------------------------|---|
| Country | Portugal |
| Region/Destination | -- |
| Area of intervention | Business Support, SMEs and Entrepreneurship |
| Challenges addressed | Quality and Effectiveness, Digitisation |
| Relevant for tourism region types | Beach Beauty, Sea Breeze, Spritz, Cosmopolitan |
| Description | <p>Created in 2019, NEST is the anchor project for the Tourism 4.0 initiative and will operate from Covilhã in the north of Portugal. The aim is to promote the transition of the Portuguese tourism sector to the digital economy and to foster innovation and entrepreneurship. The Centre's main objectives are to promote entrepreneurship, innovation and research in tourism; support companies that develop a creative and innovative approach; create innovation laboratories in partnership with universities, tourism schools, incubators and knowledge centres; and produce and transfer knowledge to companies. Its main areas of activity are: Digital academy for tourism start-ups. Incubation and acceleration services. Advising micro, small and medium sized tourism enterprises. Development of new products and technologies (Demo) and experimentation, creation and validation of prototypes (Living Lab).</p> <p>The NEST initiative is an innovative solution, developed at national level and aiming to provide new approaches in Portuguese tourism. To do so, the NEST initiative aims to develop tourism through a threefold logic (Seamless experiences, Sustainability and Big Data) to improve tourists experiences and develop positive impacts on territories. To reach its goal Turismo de Portugal constituted a partnership bringing together various actors at national (Turismo de Portugal, NOS, Brisa Via Verde), and international (Google, Microsoft) level, from the private and the public sector.</p> <p>NEST is seeking to become a Digital Innovation Hub and support the digital and innovation ecosystem of the tourism sector in Portugal.</p> |
| Expected long-term impact | <p>Better access to specialised training and thus better digital skills for all partners in the tourism value chain.</p> <p>New entrepreneurial ideas and companies that work with digital tourism products and services.</p> <p>Establishing a culture of innovation in the tourism sector.</p> |
| Lessons | <p>This case shows how regions can establish hubs for innovation in the tourism sector to be better prepared for future trends (digitisation, high quality). The physical location is not that important anymore as many services can be offered today online. So, beneficiaries of the support services can also come from all over the world, multiplying the target groups of such an innovation centre.</p> <p>Intermediate entities such as Tourism Innovation Centres can become important actors in implementing other public policy tools to support innovation in the tourism value chain. They offer a huge opportunity to bring important players together (from within a region and outside the region).</p> <p>With the COVID-19 crisis, many companies have expressed an urgent need for technological upgrades to improve their communication with their customers and their efficiency in order to lower operating costs. The current biggest challenge for NEST is to match the beneficiaries' expectations and keep growing at this fast pace. Even if companies, especially SMEs in the tourism sector, are still suffering from the current situation, it is crucial not to stop trying to seek innovation in the field.</p> <p>The NEST concept is transferable to other Member States. In this sense, Turismo de Portugal would like to strengthen its collaborations on a European scale and present the initiative to a wider audience.</p> |
| Relevance for Policy Objectives | <p>1 Smart Europe</p> <p>3 A more connected Europe</p> |
| Further Information | https://www.nestportugal.pt/ |

| Smart Tourism Destination | |
|-----------------------------------|--|
| Country | Bulgaria |
| Region/Destination | Varna |
| Area of intervention | Research, Innovation and Technology |
| Challenges addressed | Digitisation, Quality and Effectiveness, Safe and seamless, Environmental Effects |
| Relevant for tourism region types | Cosmopolitan, Beach Beauty, Sea Breeze, Spritz, Jagertee |
| Description | <p>This case presents the Smart Tourism Destination (STD) methodology. It can be seen as a comprehensive tool set to introduce innovative, efficient and sustainable tools, techniques and processes at the level of local tourism destinations in order to make the overall tourism sector more resilient and responsible. The concept follows the "Smart Tourist Destination (STD) Methodology", developed by SEGITTUR in Spain and based on the analysis of the destinations around five axes and 400 indicators on governance, innovation, technology, sustainability and accessibility, promoting an integrated vision of the territory being a tourist destination. The STD methodology has already proven to be transferable, considering its international implementation (Spain, Mexico, Colombia, EU Capital for Smart Tourism), and the relevance of this concept at a global scale, given the dissemination e.g. through the 8th Global Summit of the UNWTO dedicated to the theme.</p> <p>This concept has inspired, to a certain extent, the shift towards the STD approach in other tourist destinations in Europe. For instance, a similar project was developed for the destination Varna in Bulgaria which developed a series of projects with activities and objectives pointing to the development of a smart tourism destination. Researchers from the University of Varna elaborated an in-depth assessment of the city's potential for further development and transformation in this direction. This exercise can be an interesting inspiration for other cities and tourism destinations in Europe.</p> |
| Expected long-term impact | An increase in competitiveness, thanks to the better use of its tourism resources and the identification and creation of others. An improvement in the efficiency of production and marketing processes. A boost to the sustainable development of the destination in its three aspects: environmental, economic and socio-cultural. An improvement in the quality of stay of visitors and the quality of life of residents. To make the tourism strategy the basis for the economic dynamization of the territory, guaranteeing its positive effects in the long term |
| Lessons | The experience of the application of the STD methodology in Spain as well as other projects to promote the concept of smart tourism destination have identified the need of a joint and coordinated action of the private and public sector as a key aspect for the development of smart tourism destinations. The involvement and active participation of actors from the public sector, and in particular local institutions with local competencies in tourism, combined with tourism companies from the private sector is considered crucial. |
| Relevance for Policy Objectives | 1 Smart Europe 3 A more connected Europe |
| Further Information | https://www.segittur.es/destinos-turisticos-inteligentes/ https://hrcak.srce.hr/241355 |

| Climate-friendly holidays in the Eifel | |
|--|--|
| Country | Germany |
| Region/Destination | Eifel |
| Area of intervention | Destination Management and Governance |
| Challenges addressed | Environmental Effects, Less Carbon, Safe and seamless |
| Relevant for tourism region types | Spritz, Sea Breeze, Jagertee, Cosmopolitan |
| Description | <p>The project allowed for the first time for a nature park tourist region in Germany to calculate the so-called "CO2 footprint" and make it available as a data basis. In the medium term it is expected to avoid 10% of tourism CO2 emissions by means of the information and measures that have been made available. There had been a desire for a free and integrated public transport card in the region for years. For the concrete implementation, the project was just right to convince the transport associations and the transport companies in particular. Another important result was the awarding of climate-friendly hosts. In addition, the project raised awareness on a large scale. All in all, the impact of the project can be summarised as very stimulating.</p> <p>According to the regional stakeholders, the project has given the topic of sustainable tourism a decisive boost, in particular to the relevance of free and integrated public transport for visitors in combination with suitable and tailored local public transport offers for tourists.</p> <p>This experience can be transferred to other destinations, in particular, to other natural and rural tourism destinations with similar characteristics like the Eifel. As the case of Eifel shows, there are many ways to scale the commitment of a destination to become sustainable and climate-friendly, when sustainability becomes the key development principle of a tourism destination (instead of quantitative growth).</p> |
| Expected long-term impact | The KlimaTour Eifel initiative aimed to reduce the climate-damaging emissions for a stay in the North Eifel and to convince different players in the tourism ecosystem to commit to become a climate-friendly and sustainable destination, reducing the CO2 emissions of travel to/from and stays/activities in region. |
| Lessons | <p>It was relevant to have a good cooperation between the different partners (tourism agencies, public transport agencies, accommodation providers, local governments) and an effective network in the region. Sustainability can only be achieved when engaging and addressing the complete tourism ecosystem, from transport to accommodation, restaurants, activities and destination management. Working with the complete tourism ecosystem and other players (mobility, agri-food producers, energy generation) in the territory is key to become more climate-friendly as a destination and as a region.</p> <p>One of the success factors was the interest and positive response from regional businesses and transport associations. Other tourism stakeholders such as excursion destinations also participate in the card with discounts. The VRS (Rhein-Sieg) and AVV (Aachen city region) local transport associations are important project participants without whose cooperation the Card would not have come into being. The transport associations are also involved today as important contractual partners.</p> <p>To achieve sustainability, it was necessary to start with pilot actions, but develop sustainable long-term solutions, for example through engaging external partners and ensure long-term funding of actions. To include the activities in strategies and tourism marketing concepts was also very useful. It is necessary to build up critical mass of public and private partners. This might take several years. Visibility and support through national and regional initiatives and networks can help destinations and partners to learn and show their results.</p> |
| Relevance for Policy Objectives | 2 Green Europe |
| Further information | http://www.klimatour-eifel.de/ |

| Alsace: Promoting as cycling tourism destination with EuroVelo Routes | |
|---|--|
| Country | FR-DE (and EuroVelo Routes in most European countries) |
| Region/Destination | Alsace-Upper Rhine |
| Area of intervention | Partnerships |
| Challenges addressed | Environmental Effects, Less Carbon, Safe and seamless |
| Relevant for tourism region types | Spritz, Sea Breeze, Jagertee |
| Description | <p>Alsace is a destination full of attractions for fans of cultural sightseeing and authentic charm. The region is a typical representation of the tourism type "Spritz" in our study. Even if the number of tourists is high, the regional and local tourism destination management organisations work hard to increase the benefit from tourists and to increase the attractiveness of the region for longer stays or repetition of visits. In this context, the Alsace tourism destination management organisation (ADT) actively promotes cycling tourism in its region. In 2019, about 2 million cyclists used the region's 2,500 km of cycling routes.</p> <p>Three EuroVelo Routes cross Alsace (5, 6, 15). Several cross-border cycling routes have been developed and ensure a seamless travel experience. The northernmost route links Alsace to the Palatinate via the Lauter cycle trail. Further south, several trails criss-cross the Rhine via the many cross-over points (ferry, bridge and dam). The EuroVelo routes emerged as part of an EU project to develop the European cycle route network. The promote integrated and sustainable travelling and tourism across borders in Europe. Cross-border integration of tourism products and natural areas is a specific challenge in many border regions of Europe, specifically the rural and mountainous areas.</p> <p>This case study shows how the development of a specific tourism product is possible with the participation of many different players within a region and beyond. Partnership, governance and cross-border/transnational cooperation in four key areas (infrastructure, services, communication and promotion, and monitoring and evaluation) is key to develop sustainable tourism in many European regions and increase its benefit for the region.</p> |
| Expected long-term impact | <p>A fully developed and high-quality cycling tourism network, which is well-connected to national, regional and local cycle route networks.</p> <p>Promotion of safe and sustainable tourism, increasing the attractiveness for visitors and the number of days and EUR spent in the region.</p> |
| Lessons | <p>The ongoing dialogue among partners of Alsace à vélo is one of the key success factors. The dialogues facilitate coordinated activities in the four axes and thus developing a comprehensive offer for cycling tourists that invited them to stay longer in the region. The focus on long-distance cycling and developing cycling routes from the EuroVelo routes helps to mobilise, engage and keep different partners involved, since these types of tourists are most important for the entire tourism sector.</p> <p>The COVID-19 crisis has been an important push factor for cycling tourism. An increase of cycling put the development of cycling infrastructure and routes higher on the agendas of local and regional authorities. In France, EuroVelo routes were used by 20% more cyclists in 2020 compared to 2019.</p> <p>Lessons from Alsace à vélo can be applied in other regions in Europe as well. The EuroVelo network crosses regions in all EU Member States and some neighbouring countries. As such other regions can also use the development of this network to capitalise on the increased attention to cycling due to the pandemic.</p> |
| Relevance for Policy Objectives | <p>2 Green Europe</p> <p>3 A more connected Europe</p> |
| Further information | <p>https://www.cyclinginalsace.com/en</p> <p>https://pro.eurovelo.com/download/document/EV-Strategy2030-web.pdf</p> |

| Storytelling Interpretation Grant Scheme in Ireland | |
|---|--|
| Country | Ireland |
| Region/Destination | Eastern Ireland |
| Area of intervention | Business Support, SMEs and Entrepreneurship |
| Challenges addressed | Quality and Effectiveness, Digitisation |
| Relevant for tourism region types | Sea Breeze, Spritz |
| Description | <p>Ireland's Ancient East Storytelling Interpretation Investment Scheme in 2017 to transform the quality of interpretation, animation and storytelling at existing heritage and visitor attractions throughout Ireland's Ancient East. One project was the new 'Masterpieces in Glass' visitor experience, located in the 18th century Bishop's Palace, was co-funded by Fáilte Ireland (€200,000), and Waterford City & County Council working with a local creative agency. The outcome was a new 4D experience which brings to life the history of glassmaking in Waterford. Using augmented reality, visitors can explore rare objects used in glassmaking in the county. This new 4D experience will be made available in French and Mandarin.</p> <p>The example of the Ancient East storytelling and interpretation grant scheme shows how a grant scheme can be used to promote storytelling in local attractions, to stimulate the use of digital tools for innovative tourism product development and to strengthen a tourism destination brand.</p> <p>Strategic guidance and operational support to beneficiaries are important to connect the grants to overall tourism objectives for a given destination. Grant schemes are delivery mechanisms for wider strategic goals. The Ancient East grant scheme deliberately contribute to the wider objectives of strengthening the brand and attracting more tourists, notably from abroad. Following the lessons from Fáilte Ireland, the grant scheme should thus be seen as a means and not an end in itself.</p> |
| Expected long-term impact | The grant scheme was implemented in the context of the national tourism investment strategy that supports tourism industry growth in Ireland. Through this strategy, Ireland aims to deliver genuinely innovative projects that will transform visitor experiences for Ireland's target markets while supporting jobs in the industry and protecting the natural environment. |
| Lessons | <p>Embedding the Grant Scheme into wider objectives for destination development and promotion was key for the success and its impact on the tourism product of the region.</p> <p>Two main factors have been important for the scheme's main success for destination management organisation, namely managing the expectations of beneficiaries and using the grant to achieve wider objectives. Two documents helped to achieve this: First, the Interpretation toolkit played a central role in explaining the basic requirements for designing and implementing storytelling. Second, the Guidelines for the Grant Scheme presented the main requirements and the application process. Fáilte Ireland developed both documents and use it a key tool for the development and implementation of the 2017 grant scheme. The toolkit translates the region's brand and strategic objectives into practical tools and techniques for storytelling and interpretation. It does so inter alia by focusing on the target group and encouraging place-based stories, based on local and the attraction's history. The toolkit functioned as red thread.</p> |
| Relevance for Policy Objectives | 1 Smart Europe 5 Europe closer to the citizens |
| Further information | https://www.failteireland.ie/Utility/News-Library/Augmented-reality-and-interactive-experiences-set.aspx https://www.failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/2_Develop_Your_Business/6_Funding/FI-Tourism-Investment-Strategy-Final-07-06-16_1.pdf |

| Online Academy Dachstein, Austria | |
|-----------------------------------|---|
| Country | Austria |
| Region/Destination | Dachstein – Salzkammergut |
| Area of intervention | Skills and Talent |
| Challenges addressed | Quality and Effectiveness, Digitisation |
| Relevant for tourism region types | Jagertee, Sea Breeze, Spritz |
| Description | <p>The Dachstein Salzkammergut Academy bundles knowledge on tourism-related topics in this specially designed e-learning portal. All tourism partners of the Dachstein Salzkammergut Region are thus able to access an extensive pool of knowledge. The courses consolidate the basics and provide input in a wide range of areas: online marketing, social media, digital communication, website, internet, booking systems. Detailed explanatory videos convey complex tourism content in a simple and understandable way. These can be called up at any time, which means knowledge transfer independent of time. The courses are provided free of charge in individual modules and can be accessed 24 hours a day in the online portal. This is organised by a specific e-learning team under the umbrella of the local tourism association. This case shows how holiday regions and, in particular destination management organisations and tourism association, can prepare the tourism businesses in their region for future trends (digitisation, high quality) to recover quicker from the crisis through investing in high-quality and inclusive tourism models. Through a “train-the trainer” approach, the regional tourism association helped the smaller local association to develop own, in-house skills for digitisation in tourism. This was then translated into a tailored and targeted support for the local tourism businesses which are mostly small and micro companies. Support, advice and training in digital skills for them is free-of-charge and close to their home (or online), so that they avoid costly or time-intensive trips to larger cities.</p> |
| Expected long-term impact | Better access to specialised training and thus better digital skills for all micro and small regional tourism partners in the value chain, specifically in rural and peripheral areas. |
| Lessons | <p>This bottom-up initiative shows how micro and small tourism companies can benefit from the digitisation through smart and place-based support schemes, and how even local tourism agencies can build up a support service for local SMEs.</p> <p>The example shows that this service can be offered in-house by a local tourism association; no need for large investments are high maintenance costs are necessary. The service is scalable and can be expanded with the support of experts and remote training. This initiative can be transferred to many other regions and tourism destinations.</p> <p>It has to be noted that this initiative benefitted from a regional initiative to ‘train digital trainers’ at all local tourism agencies in the region and establish a regional network of digital ‘eCoaches’ in tourism, leading to this positive uptake for the Dachstein Salzkammergut area.</p> |
| Relevance for Policy Objectives | <p>1 Smart Europe</p> <p>3 A more connected Europe</p> <p>4 A more social Europe</p> |
| Further information | <p>https://dachstein-akademie.at/</p> <p>https://dachstein.salzkammergut.at/magazin/</p> |

| Sustainable Cruise Infrastructure, Estonia | |
|--|--|
| Country | Estonia |
| Region/Destination | -- |
| Area of intervention | Infrastructure |
| Challenges addressed | Environmental Effects, Circular Economy, Safe and seamless |
| Relevant for tourism region types | Beach Beauty, Sea Breeze, Cosmopolitan |
| Description | <p>Cruise tourism has severe negative effects on the environment and the climate. Improving sustainability in the cruise sector is important in the light of increased customer environmental awareness and environmental regulations. The Port of Tallin – in the context of its Sustainability Strategy – decided to establish a technical solution for the problem of wastewater disposal of ships in Tallin. The project featured the installation of wastewater pipeline connections in the cruise terminal pier, directly connected to the municipal sewerage systems. The micro-tunnel allows ships stopping at the Old City Harbour to dispose now unlimited quantities of wastewater. The wastewater is then treated at Tallinn's treatment plants.</p> <p>In 2017, the Port of Tallinn won the first prize at the Seatrade Cruise Awards ceremony in the environmental initiative category for its micro-tunnel.</p> |
| Expected long-term impact | <p>Better water quality in the Baltic Sea</p> <p>Reduce the negative environmental effects of cruise ships</p> <p>Improve the efficiency and sustainability of the port activity</p> |
| Lessons | <p>Cruise tourism is one of the most polluting tourism models. To make tourism more sustainable will require to make cruise tourism more sustainable. This covers a bunch of environmental measures, not only on board, but in particular in the port areas and on the pier. However, to implement actions is not always easy, given the complex network of actors, environmental regulations and economic interests. The example of the micro-tunnel and the sustainability measures of the Port of Tallinn show that many negative environmental effects can be reduced when the relevant stakeholders work together: Port authorities, Terminal operators, relevant public authorities at local, regional and national level, cruise lines, research institutes, international organisations.</p> <p>Sustainability and social responsibility become more and more an asset for the attraction of employees and investors. They also help to meet ever more strictly international conventions and regulations. But they also help to increase the productivity and efficiency of the port and cruise activity.</p> <p>To become more sustainable, strategic action based on knowledge and evidence is needed.</p> <p>The Tallinn case is an example of a good practice where infrastructure has supported the reduction of environmental effects through reducing the cruise ship passenger wastewater and at the same time improving the touristic profile and product of the region. Other port cities in the Baltic Sea, the North Sea, at the Atlantic Coast, in the Mediterranean as well as the Outermost Regions can learn from this example and develop similar approaches to become more sustainable and develop a more sustainable cruise tourism model together with the cruise lines and travel operators.</p> |
| Relevance for Policy Objectives | <p>2 Green Europe</p> <p>3 A more connected Europe</p> |
| Further information | <p>http://www.portoftallinn.com/news?art=735</p> <p>https://www.cruiseeurope.com/news/news-tallinn-1563454943/</p> |

| Innovation in Tourism in Crete's Smart Specialisation Strategy (S3) | |
|---|--|
| Country | Greece |
| Region/Destination | Crete |
| Area of intervention | Research, Innovation and Technology |
| Challenges addressed | Environmental Effects, Less Carbon, Digitisation, Quality and Effectiveness, Safe and seamless, Circular Economy, Seasonality |
| Relevant for tourism region types | Beach Beauty, Sea Breeze, Jagertee, Spritz |
| Description | <p>The Smart Specialisation Strategy (S3) 2014-2020 of the Region of Crete embraced the vision of Crete's developmental plan. The S3 was an integrated proposal for the regional economic development aiming at enhancing the potential of innovation and scientific knowledge, in an attempt to boost the competitiveness of the well-established branches and to expand the productive base of Crete towards new emerging high added value sectors. In particular, Crete's S3 aimed at using the potential of innovation and scientific knowledge in order to, among others, achieve the consolidation in the international market of a competitive cultural-tourism complex, with unique and original features. Several measures in the S3 and funded by ERDF in 2014-2020 were linked to the cultural-tourism value chain, in particular to use scientific knowledge, innovation and ICT's to promote the enhancement of tourism services, the differentiation of tourism product to sectors where Crete could develop comparative advantages, the enhancement of entry points and the promotion of Crete's rich cultural heritage and interconnection with the society and the local economy.</p> <p>The process towards the Regional Innovation Strategy was initiated back in 2013 to be then approved and in place in 2016. The strategic framework has been important to make the efforts for innovating products, processes, marketing and organisational structures in the tourism ecosystem of Crete. However, the first years have been important to building up the S3 governance and to bring stakeholders together in a regional platform and in local networks. Given that Crete is home to a number of universities and research centres and taking into account the steps taken through the RIS3 to bridge the quadruple helix, there can be a starting point for more regional innovation.</p> |
| Expected long-term impact | Upgrading and expanding the tourism value chain in the region. support the transformation of tourism into a high added value and knowledge-intensive activity. Facilitate the digital transformation of tourism. Increase quality of the employment generated by tourism in the region. Make tourism more sustainable with less negative social and environmental effects. |
| Lessons | <p>The S3 strategy in Crete has shown that innovation in tourism needs a different approach to innovation. The complexity of the tourism ecosystem and the important role of players outside the region (tour operators, flight companies, travel sellers) make it difficult to promote radical innovation or new models like, for example, sustainable tourism.</p> <p>A key success factor of the RIS is that it managed to bridge the different players in the region, particularly the research and university sector with the business sector. This is a first steps towards more solid basis in the future and for developing innovation for the tourism and other sectors on Crete and not being dependent on using already tested and implemented methods from abroad.</p> |
| Relevance for Policy Objectives | 1 Smart Europe |
| Further information | http://www.pepkritis.gr/wp-content/uploads/2016/02/RIS-Crete-Translation-ENG.pdf |

| Smart Tourism Network | |
|-----------------------------------|--|
| Country | Croatia |
| Region/Destination | -- |
| Area of intervention | Partnerships |
| Challenges addressed | Digitisation |
| Relevant for tourism region types | Beach Beauty, Sea Breeze, Spritz, Cosmopolitan |
| Description | <p>The Smart Tourism Network initiative (Pametani Turizam) is a Croatian initiative from the private sector aiming to catch digital opportunities to support tourism development (https://pametniturizam.hr/ and https://youtu.be/GCDWne7Lk7A consulted on 03.06.2021).</p> <p>Particularly since the pandemic, many tourism entities had to revise their strategies and see how to better invest in future activities and infrastructure. In order to contribute to this need, the initiative has set four goals: achieve visitor growth, extend the season, provide a unique experience and greater value to tourists, and enable an easier promotion of local experiences.</p> <p>To reach these goals, Pametan Turizam created a network of seven Croatian companies specialised in the digital field. The activities implemented by these companies are complementary and together form a complete solution that can help destinations to become more sustainable, to communicate their destination brand more clearly and to digitise and distribute the offer to reach guests more easily.</p> <p>The following companies are involved in the initiative:</p> <p>Infosit: Web solutions (IT company)</p> <p>Orioly: Travel tech company specialized in digital solutions.</p> <p>PHOBS: Cloud platform for the online sales of hotels and camping sites</p> <p>EquinoxVision: Attractive promotion of tourism destination thanks to augmented reality and interactive virtual content</p> <p>Magic4Club: PR agency</p> <p>DeltaReality: Specialist in the design of AR/VR tours</p> <p>HrTurizam: Leading B2B web portal for tourism professionals</p> <p>The network is providing several services contributing to the transition towards a more digital tourism. In this sense, Pametan Turizam develops IT solutions for digital transformation of the local tourist offer supply, the digital platform for online sales of tourist products, online reservation systems for all business branches in tourism, the development of functional destination websites and mobile applications, connectivity platforms for hospitality, destination management framework solutions, AR and VR technologies, branding and strategic development of smart destinations.</p> <p>The initiative has already been launched in 20 Croatians destinations, and several of them have already started launching content digitalisation projects, implementing smart marketing campaigns.</p> |
| Expected long-term impact | <p>To implement long-term plans for the development of destinations, aiming to ensure a mutual sharing of know-how and providing support in developing business plans and activities, as well as joint monitoring of world trends.</p> <p>To encourage destinations to accept digital trends and to be ready to implement them in long-term strategies.</p> |
| Lessons | <p>This case shows how private supply-oriented initiatives can stimulate innovation and digitalisation in tourism. Public authorities can support these initiatives and strengthen the visibility of technological and digital providers to make it easier for tourism companies to turn towards digitalisation.</p> |
| Relevance for Policy Objectives | 1 Smart Europe |
| Further information | https://pametniturizam.hr/ |

| Eco-destination label | |
|-----------------------------------|---|
| Country | Romania |
| Region/Destination | -- |
| Area of intervention | Destination Management and Governance |
| Challenges addressed | Environmental Effects, Less Carbon, Digitisation, Safe and seamless |
| Relevant for tourism region types | Sea Breeze, Jagertee, Spritz |
| Description | <p>The ecotourism destination is an innovative concept for the development in regions in or close to protected areas like national parks, nature parks or Nature-2000 sites. In these destinations, the local communities are supported to develop family businesses in tourism, showing local traditions and promoting local products. The respect for nature for nature and community represents an essential value of this type of tourism. Often, tourists can assist or participate in daily activities such as taking care of farm animals, collecting fruits or baking bread. Hence, this type of tourism has a high cultural component and looks for social responsibility. What is a positive feature of ecotourism approaches is that the economic impact at local level is significantly higher than the average of the classic tourism. According to the Association of Ecotourism in Romania (AER), over 50% of the tourist expenditures remain in the deployment area of the tourism program, mainly in the rural areas. As such it is often used as a tool for local economic development in rural and less densely developed regions, far from the typical mass tourism destinations. In this context it is part of most Community-Led Local Development (CLLD) initiatives (area-based initiatives created in previous years as LEADER/EARDF or EMFF initiatives that created Fisheries or rural Development Local Action Groups (LAGs and FLAGS).</p> <p>Romania has engaged with a number of actions with other countries to develop sustainable tourism products and make the most of cultural assets, in line with policy priorities. It works within the Carpathian Convention to encourage co-operation for the protection and sustainable development of the Carpathians, to improve local quality of life and preserve natural and cultural values. It also works with Bulgaria, Croatia and Serbia on a programme of cultural route development in the lower Danube¹.</p> <p>Following the National Ecotourism Strategy, Romania became the first country in Europe to elaborate a system for evaluating and labelling eco-destinations. The label helps clients to better identify those products that can offer awesome nature and rural culture experiences, raises the level of trust in the Romanian ecotourism product on the international tourist market, becomes a marketing tool for tour-operators and guesthouse owners².</p> <p>In order to encourage sustainable tourism product development, usually labels are awarded to industry players. In Europe, a wide range of eco labels for tourism, accommodation and services is available³. In Romania, the Ecotourism Certification System was developed by the Association of Ecotourism in Romania (AER). The status of ecotourism destination is officially granted by the National Authority for Tourism after an evaluation according to criteria developed on the basis of international expertise. The majority of ecotourism promoters are members of the AER. AER is a partnership for nature conservation and tourism in Romania between tourism associations, non-governmental organizations for local development and nature conservation, nature preservation projects and travel agencies.</p> <p>The Ecotourism Certification System was developed by AER in the context of an EU project back in 2009 called "ECODESTINET – A network for the Development a European Quality Label for Ecotourism Destinations"⁴. The certification system is based on the Nature and Ecotourism Accreditation Programme promoted by the Australian Ecotourism Association (NEAP is the first accreditation system in ecotourism) and on Nature's Best developed by the Swedish Ecotourism Association (the first accreditation system in ecotourism in the northern hemisphere). The Ecotourism Certification System addresses two different categories of applicants: a) ecotourism programmes / tours provided by tour-operators (i.e. eco-tours of maximum 15 participants), and b) small-scale</p> |



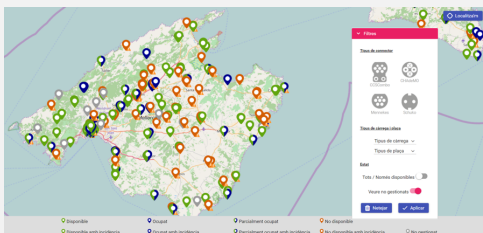
¹ EEFECT Project (2018): Study on ecotourism development. https://epale.ec.europa.eu/sites/default/files/study-on-ecotourism_final-pub.pdf

² OECD (2016), "Romania", in OECD Tourism Trends and Policies 2016, OECD Publishing, Paris.

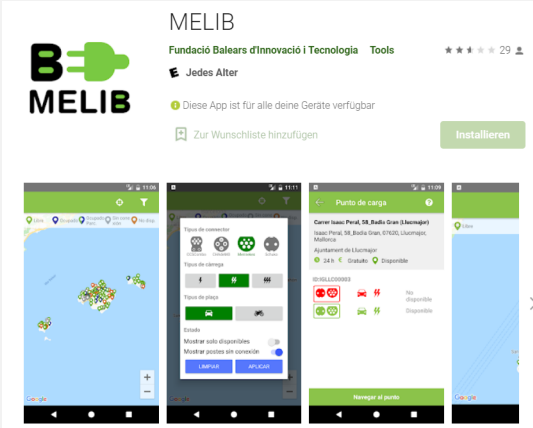
³ <http://www.greentourism.eu/en/GreenLabel/IndexPublic>

⁴ <http://ecoroute.prismanet.gr/destinet/en/project.php?id=1>

| Eco-destination label | |
|---------------------------------|---|
| | <p>accommodation structures in rural and natural areas (eco-lodges and guesthouses of maximum 25 rooms).</p> <p>AER has identified a series of benefits that can be brought by implementing the Ecotourism Certification System, such as:</p> <ul style="list-style-type: none"> • helps clients to better identify those products that can offer awesome nature and rural culture experiences, • raises the level of trust in the Romanian ecotourism product on the international tourist market, • becomes a marketing tool for tour-operators and guesthouse owners, • enhances the quality of the ecotourism services, • contributes actively to nature conservation and leads to sustainable local development, • supports local administrations of protected areas for development of low impact tourism, • offers a platform for common activities between the business sector and nature conservation entities. |
| Expected long-term impact | <p>The label helps as a guidance and marketing tool for small ecotourism initiatives (accommodation and tour operators). It helps to establish and ensure a certain quality of the ecotourism services, contributes actively to nature conservation and leads to sustainable local development. Ecotourism is a valuable tool in rural areas as it supports local administrations of protected areas for development of low impact tourism, offers a platform for common activities between the business sector and nature conservation entities.</p> |
| Lessons | <p>Ecotourism can be a valuable tool for all rural regions and even in suburban areas (as sub-destinations of urban and cosmopolitan tourists). However, it is important to integrate ecotourism approaches into the wider territorial development. Carrying capacities are more important for ecotourism than for any other tourism segment. Limits for growth need to be established by entities who are in charge of the territorial ecotourism approach. Establishing labels and ecotourism networks requires usually public support to be able to involve many small tourism companies and develop the required capacities for destination management and run certification and control procedures.</p> |
| Relevance for Policy Objectives | <p>2 Green Europe 4 A more social Europe</p> |
| Further information | <p>https://www.eco-romania.ro/en/certification-system/ https://asociatiaaer.ro/en/</p> |

| MOVITUR e-Mobility | |
|-----------------------------------|---|
| Country | Spain |
| Region/Destination | Mallorca |
| Area of intervention | Partnerships |
| Challenges addressed | Less Carbon, Digitisation, Safe and seamless |
| Relevant for tourism region types | Beach Beauty, Sea Breeze, Jagertee, Spritz, Cosmopolitan |
| Description | <p>MOVITUR⁵ was a pioneering project funded in 2015 by the Spanish Ministry of Industry, Tourism and Trade with the aim to design a comprehensive plan for the deployment of electric mobility on the island of Mallorca. The project foresaw a network of fast-charging electric stations installed by ENDESA, a Spanish electricity company. At least 8 rent-a-car companies in Mallorca were involved and acquired electric vehicles to offer them in the 2015-2016 seasons. This was an opportunity for the transition in local/regional transport through innovation in tourism, allowing a WIN-WIN scenario for all participants: visitors, residents, producers, rent-a-cars and destination.</p> <p>As a result of the project, various rent-a-car companies now have a varied fleet of electric vehicles to offer, a clear commitment to electric mobility that has a zero carbon footprint and represents an advance in the criteria of territorial sustainability.</p> <p>Example of Record Go company website and e-vehicle infrastructure in Mallorca (www.recordrentacar.com/es/alquiler-coches-electricos-mallorca):</p>   <p>In addition, within the context of an ERDF funded follow-up project, the Government of the Balearic Islands together with numerous municipalities set up a management system for electric vehicle charging that includes a map of all the charging points integrated in the MELIB system (Electric Mobility in the Balearic Islands) and a mobile application. From this app the user can enable recharging for your electric rental car in Palma de Mallorca. The service was developed not only for Mallorca, but also for Menorca and Ibiza.</p> <p>MELIB service map (www.tib.org/ximelib/public/map.xhtml):</p>  |

⁵ <https://www.balearsesturisme.org/movitur/endesa-ecar.html>

| MOVITUR e-Mobility | |
|--|---|
| | <p>MELIB in Google Play App Store:</p>  <p>Other players, such as the Local Government of Palma are supporting with additional charging stations and advantages for e-vehicles, such as exemption of parking fees or tax reliefs⁶. Mallorca plans to transform its rental car fleet complete to e-vehicles by 2030.</p> |
| <p>Expected long-term impact</p> | <p>Transition to e-mobility in local/regional transport services in the tourism sector. More responsible tourism with less carbon emissions. Benefitting from digital tools and solutions to promote low-carbon solutions for transport in tourism destinations.</p> |
| <p>Lessons</p> | <p>This case shows how first steps and pioneering projects are needed to gain momentum for major transformations. The case also shows how infrastructure measures need to be combined with new digital tools (app and online map with real-time information on free charging stations), the stimulation of the supply side and other complementary measures (incentives for e-vehicles, free parking). Many private and public players need to work together to achieve an impact on the tourism destination.</p> |
| <p>Relevance for Policy Objectives</p> | <p>2 Green Europe 3 A more connected Europe</p> |
| <p>Further information</p> | <p>www.tib.org/ximelib/public/map.xhtml https://www.balearsesturisme.org/movitur/endsa-ecar.html</p> |

⁶ <http://www.mobipalma.mobi/es/mobilitat/circulacio/vehicle-electric/>

| Tourism as part of sustainable territorial planning | |
|---|--|
| Country | Italy |
| Region/Destination | Sardinia |
| Area of intervention | Partnerships |
| Challenges addressed | Environmental Effects, Less Carbon |
| Relevant for tourism region types | Beach Beauty, Sea Breeze, Jagertee, Spritz, Cosmopolitan |
| Description | <p>Since 2018, the Region of Sardinia is engaged in the elaboration of its new Regional Sustainable Development Strategy "Sardegna 2030", through a path of involvement of regional and local institutions and civil society. The strategy shall be in line with the 2030 Agenda and the 17 Sustainable Development Goals aiming to change the current development model, which has clearly proved to be unsustainable, stressing the need for an integrated vision of the dimensions of development - economic, environmental protection and human and social rights. Talking about global development without translating it into individual realities is not enough: local authorities and communities are responsible for achieving the Sustainable Development Goals at the local level, recognising in particular the interdependent relationships between urban, peri-urban and rural areas, through an approach capable of creating direct contact with communities and their economic, cultural and social realities.</p> <p>The Regional Forum for Sustainable Development was established as the place where different stakeholders can participate: institutions, enterprises, civil society can contribute to the elaboration of strategic documents for Sardinia in 2030. The process started from the analysis of emergencies, checking and integrating the Strategic Objectives and the related macro-actions to enable their achievement, up to the identification of the most appropriate tools for their implementation. The process brings together the elaboration of the Regional Strategy for Sustainable Development, and the new programming of European funds for the period 2021-2027.</p> <p>The Regional Sustainable Development Strategy is built around 5 pillars (working groups) on the following topics: Smarter Sardinia, Greener Sardinia, Connected Sardinia, Social Sardinia and Closer to Citizens Sardinia, in line with the EU Policy Objectives for 2021-2027. Tourism is considered an important driver for change. It was analysed, like other economic activities and strategic fields of the region, from the overall territorial perspective with all relevant effects and opportunities from the point of view of people and local communities.</p> <p>In March 2021 the elaboration of the Regional Sustainable Development Strategy entered a new phase: the sharing and integration with local institutions and civil society. The involvement process was initially planned to take place in person. However, because of the pandemic, the actions were mostly carried out online with new tools that allow transparency and effectiveness and with the advantage of expanding the possibility of participation to a larger number of people. Four labs were organised in presence; more than 30 virtual labs during the Covid-19 period took place in order to accomplish participatory process for building the SDRS. Overall, this participatory process involved more than 2300 stakeholders until June 2021.</p> <p>Through this process, tourism was identified as one of the key topics in the near future in contributing or not to sustainable development. It intercepts many SDGs of the 2030 Agenda. Tourism emerged as one emergency goal (Strong seasonality and territorial concentration of tourism) and one strategic regional goal (Sustainable tourism for socio-economic development and the protection of culture and biodiversity). 12 actions related to it were identified.</p> <p>The specificity of the Regional Sustainable Development Strategy is its horizontal and overarching perspective. It should develop general guidelines for territorial development and will feed into 29 sector plans in the region, the tourism development plan, to be renewed in 2021, is one of them. This integrated character of the Strategy ensures that important cross-fertilization can take place between different plans and actions, for example in tourism, circular economy, energy, transport planning, climate change adaptation, natural protection and the ERDF Regional Operational Programme.</p> <p>Sardinia is also part of the Interreg MED project DESTIMED PLUS and uses the project tools to measure their performance in policymaking.</p> <p>Sardinia participates also actively in the Sustainable Tourism Community (STC) of the INTERREG MED 2014-2020 programme. This community was created to better promote common integrated actions that could boost the sustainable and responsible development of coastal and maritime tourism in the Mediterranean</p> |

Tourism as part of sustainable territorial planning

region. The Regional Sustainable Development Strategy "Sardegna 2030" is considered a good practice within this community, a summary of the case is presented below (Source: NECSTouR (2021): Report on a workshop on June 3rd during the last EU Green Week in the framework of the Interreg MED Sustainable Tourism horizontal project)




| | |
|--|--|
| <p>Expected long-term impact</p> | <p>Integrate sustainability as an overarching approach in regional and territorial planning, including sectorial plans (tourism). Integrating tourism into Sustainable Smart Specialization Strategies (S4). Integrate tourism stakeholders in the Entrepreneurial Discovery Processes. Develop skills for S4. Overcome strong seasonality and territorial concentration of tourism. Sustainable and responsible tourism contributing to socio-economic development and to the protection of culture and biodiversity.</p> |
| <p>Lessons</p> | <p>This case shows how regions are better prepared for future trends (sustainability, circular economy, more quality in employment) and can recover in the medium and long run from the crisis through investing in more sustainable and responsible tourism models and creating stable partnerships with civil society, administration, business sector and research institutions in regions.</p> |
| <p>Relevance for Policy Objectives</p> | <p>1 Smart Europe 2 Green Europe</p> |
| <p>Further information</p> | <p>https://www.regione.sardegna.it/argomenti/strategie regionali e sviluppo sostenibile/</p> |

| Health and medical Tourism | |
|-----------------------------------|---|
| Country | Finland |
| Region/Destination | -- |
| Area of intervention | Partnerships |
| Challenges addressed | Quality and Effectiveness, Safe and seamless |
| Relevant for tourism region types | Sea Breeze, Spritz, Cosmopolitan |
| Description | <p>Medical and health tourism is a booming tourism segment. Many regions in Europe have a well-developed offer of medical and well-being services which is increasingly becoming relevant for a specific type of tourism, mostly from non-EU countries. Interestingly, not only countries such as Finland or Germany received medical tourists. Hungary saw a doubling in the number of people travelling there for medical reasons. Dentistry, fertility services and cosmetic surgery are popular there and much cheaper than in many other EU countries. Similarly, a seven-fold rise was seen in medical journeys to Greece—a country which specialises in IVF treatments, among other things.</p> <p>The example of Finland shows how this is actively promoted and used for the innovative development of tourism products and services.</p> <p>Apart from clean air, Finland promises not only to their own residents but also to tourists that the Finnish healthcare system provides comprehensive and high-quality health care from primary health care services to specialized medical care. Finland has a longer life expectancy than the EU average and is ranked as one of the leading countries in terms of quality of life. The results achieved by Finnish healthcare are world class in e.g. effectiveness of specialised medical care and decreasing cancer mortality. Finland is especially strong in cancer treatment, demanding surgeries and orthopaedics/ sports medicine. Another asset is the fresh and clean air, especially in the Finnish countryside and in Lapland. "The cleanest air in the world is in the Finnish Lapland. It is proven that the world's cleanest respiratory air is in the Muonio municipality of Western Lapland. In Muonio, there are only 4 microgrammes of particles of under 10 micrometres in a cubic metre."⁷</p> <p>Finland has a long tradition of receiving patients, especially from Russia, but there is potential to receive a much bigger number of patients (also from Middle East, China etc.). Already in 2017, UAE travellers from the UAE spent about 9,900 overnights in Finland, which is 31 per cent more than in 2016. There is an important potential for growth. The Ministry of Employment and Economy in Finland created and supported a growth programme called FinlandCare in 2012 to 2017, and increasing medical tourism was one of the goals.</p> <p>Now the government has recently granted financing for continuing the work under Visit Finland (which is part of Business Finland, formerly Finpro). Recently a health travel manual for Finnish hospitals, private clinics, medical tourism facilitators and the hospitality sector was developed.</p> <p>FinlandCare offer a Hospital and Professional catalogue https://www.visitfinland.com/finlandcare/companies/.</p> <p>Some clinics that receive international patients in Finland include Helsinki University Hospital/Hyksin Oy; Kuopio University Hospital/FinnHealth; Helsinki Hospital (for spinal surgeries); Docrates Cancer Center; and Hospital NEO (for orthopaedics and sports medicine), made famous by their surgeon Sakari Orava, who treats soccer stars. Several medical tourism facilitators based in Finland provide full service packages to their customers. These include Xclusive Finland; EMA Finland (also provides private patient transportations); and Pathsurgery.</p> <p>An important aspect are not only the patients but also families and friends accompanying the patients. Usually, the clinics can recommend accommodation options in the vicinity of their premises - these partner hotels can be found in Finland's newly launched medical tourism brochure.</p> <p>The Medical Tourism Association Finland is promoting Finland as medical tourism destination. Their vision is to become the leading medical tourism destination in the Nordics and to be one of the most popular health destinations in Europe⁸. The map on their website shows the main target markets.</p> |

⁷ <https://www.visitfinland.com/finlandcare/clean-safe-country/>

⁸ <https://www.medicaltourismfinland.com/about-us>

| Health and medical Tourism | |
|---|--|
| <p>FINNISH HEALTHCARE SERVICES</p> | |
| <p>The promotion of medical tourism goes hand in hand with the promotion of Finnish health technology. Finland excels in a wide range of health technologies who are indirectly supporting the promotion of their technologies abroad via medical tourism.</p> <p>Medical tourism can be seen as a complex network of niche markets. The link between medical services, tourism and technology is becoming ever more important and can be further analysed in different European regions, not necessarily regarding high quality treatments, but also local spa and well-being services. Clinics and medical services need to be put in contact with tourism services, accommodation and other activities. Medical tourists expect complete packages and seamless travel. A new player, the Medical Tourism Facilitators emerged. Medical hotels and healthy resorts offer a new combination of services.</p> <p>Collaboration across the value chain for medical tourism:</p> | |
| <p>Source: https://www.businessfinland.fi/4af6d0/contentassets/22aab16ec8c9469992de18163b35eac2/leila-kresic-juric--kai-illing.pdf</p> | |
| Expected long-term impact | Health tourism is recognised as a potential theme bringing growth to the travel sector, contributing to year-round, sustainable tourism and digitalisation in the Visit Finland strategy. Preparation of small and micro players in the value chain for this tourism product. |
| Lessons | This case shows how regions can diversify their attractiveness and open up to new tourism segments to overcome seasonality and link tourism to other relevant sectors of the economy. Collaboration along the tourism value chain is key. New players such as medical hotels or medical tourism facilitators emerge and can be supported by public policy. |
| Relevance for Policy Objectives | 1 Smart Europe 4 A more social Europe |
| Further information | https://www.visitfinland.com/finlandcare/ https://medicaltourismfinland.com/ |

| ASSL Upgrade 2020 training schemes | |
|------------------------------------|--|
| Country | Sweden |
| Region/Destination | Swedish Lapland |
| Area of intervention | Skills and Talent |
| Challenges addressed | Quality and Effectiveness, Digitisation |
| Relevant for tourism region types | Jagertee, Spritz |
| Description | <p>The ASSL Upgrade 2020 training scheme for touristic SMEs is a COVID-19 specific measure to support small tourism companies in Swedish Lapland.</p> <p>The programme 'Arctic Spirit in Swedish Lapland' (ASSL) is part of a larger strategy for destination capacity building within the destination's own business and product development programme that started in 2016. ASSL was developed and made available through the EU Structural Funds projects 'Destination Capacity Building in Swedish Lapland' and 'Business Capacity Development in Swedish Lapland'. With ASSL Lapland supports touristic companies that want to step out, or reach further, into the international travel market.</p> <p>Swedish Lapland as tourism destination</p>  <p>The ASSL Upgrade 2020 was a special adaptation of the ASSL scheme as response to the COVID-19 crises. A call for applications was launched in April 2020. Through ASSL Upgrade, 100 hospitality companies in Swedish Lapland were offered the chance to develop their business in an eight-week development programme. The participants were compensated for direct salary costs. ASSL Upgrade was aimed at companies in the hospitality industry (e.g. accommodation facilities, activity companies, incoming, restaurants).</p> <p>Criteria for beneficiaries were:</p> <ul style="list-style-type: none"> - The company must be active and assessed as having a good level of maturity, i.e. be an export-ready company with previous experience in international markets. - The company must have been active before the crisis (March 2020) - The company has a maximum of 30 employees (in terms of annual workforce) - The company must have experience in international markets and have an international website or equivalent international communication platform - The company must be able to provide proof of employment and pay slips for participants, or an F tax certificate for sole traders - the legal form of the company must be a limited company, a partnership or a sole proprietorship <p>The company also needs to have its registered office, or a place of work, in the geographical area of Swedish Lapland, which consists of the 14 municipalities of Norrbotten and Sorsele and Skellefteå in Västerbotten.</p> |

| ASSL Upgrade 2020 training schemes | |
|------------------------------------|--|
| | <p>100 companies were given the opportunity to participate in development programme for one employee. 5 company places were guaranteed for each of 16 municipalities. The remaining places were allocated on a first-come, first-served basis, provided the companies met the given criteria.</p> <p>ASSL Upgrade was specially tailored for the Swedish Lapland tourism industry and adds knowledge based on the companies' identified demand. The programme was web-based and covered: Digitisation, Business Development, Sustainability, Host abilities, Processes, Priority markets.</p> <p>The tool for the programme was provided by the Swedish Lapland Visitors Board. The Programme started in May 2020 and lasted two months. During the mornings from Monday to Thursday, teacher-led sessions with workshops and lectures took place, the afternoons and Fridays were devoted to self-study and applying the new knowledge in business. The main part of the programme was held in English.</p> <p>Participation was reimbursed at 100% of the salary cost, up to a maximum of €25,000 per month. The maximum support that can be paid to each participating company is €50,000. 75% of the reimbursement was received at the start of the course and the remaining 25% at the end and completion of the programme. Payment was made on presentation of a pay slip/employment contract. At a later stage, proof of payment (transaction statements verifying that payment has been made) may also be requested. Attendance requirement was equivalent to 80% for the grant to be received. For sole traders/self-employed persons, a flat-rate reimbursement of 2 x EUR 25 000, totalling EUR 50 000, applied.</p> <p>Thanks to ASSL, more companies are active on the international market. Companies became more competitive and learned how to develop new products and experiences. This is reflected in product manuals and in the fact that more companies can step into the international market through collaboration in a marketing group.</p> |
| Expected long-term impact | New digital, innovation, marketing and business skills in 100 tourism companies in Swedish Lapland make them more competitive and resilient against external shocks and help them to enter to become more effective in attracting international and national tourists. |
| Lessons | This case shows how regional authorities can quickly set up a response to a crisis and support tourist companies in a region through setting up and compensating them for participation in a training scheme. This helps to turn any necessary business pause into a useful period for capacity development and reflection. |
| Relevance for Policy Objectives | 1 Smart Europe 4 A more social Europe |
| Further information | https://www.swedishlaplandvisitorsboard.com/assl-upgrade-faq/ |

3.2 Lessons from the assessment of policy initiatives

The analysis of the policy initiatives has allowed to draw the following general conclusions:

- Sustainable tourism is at the centre of many initiatives and there are many ways to promote sustainable and responsible tourism models. Most of them refer to reducing the environmental effects of tourism-related activities or increasing the positive social and economic return on local communities. This can be done in numerous ways, some initiatives promote carbon-free travel at local level, others the use of regionally produced food and beverages, some regions go for circular and resource-efficient approaches, while others promote lodgements with eco-labels and a certified reduced effect on the environment.
- Sustainable tourism and digitisation initiatives do not exclude each other. Rather, they go hand in hand, using the new technologies or digital tools as instruments to monitor, register or promote environmental or social effects.
- In general, digitisation is used to serve the destination management organisations and the public authorities to support their decision-making. In addition, digital tools improve the direct communication of destinations with the visitors.
- Innovation and knowledge are key elements of all policy initiatives. It can refer to innovation in products, technological and digital innovation, more efficient management processes, training and capacity development or new marketing approaches. What can be observed that in tourism, new knowledge generates from experts and professional service providers and tourism companies, not so much from the traditional Universities or Research Institutes.
- Partnerships and collaboration are at the core of most policy initiatives. To make tourism more resilient against external shocks and to establish sustainable tourism models requires working with players from the complete value chain and, many times from outside the system or outside the destination. For example, sometimes the local waste company or the local public transport becomes a key partner in a new initiative. In other projects, global technology companies or multinational tour operators need to be taken on board to generate a change. The connection to other services and business sectors becomes ever more important.
- After the COVID experience, the call for not only smart but even 'wiser' destinations is getting louder. This wise destination management looks not only on digital monitoring of visitor flows and efficient processes, but also on understanding and respecting of (social and environmental) limits for a sustainable tourism within a given territory. In this sense, the artificial boundaries between the main destination and the surrounding sub-destinations, the city and its hinterland become more and more blurred. This requires a more regional concept of smartness by going beyond the traditional destination and creating symbiotic relationships with nearby territories. This thinking requires a more integrated territorial approach for tourism and integrating tourism in existing territorial planning processes.

Table 3.2 Lessons from assessment of policy initiatives per PO (2021-2027)

| EU Policy Objective | Lesson learned from analysis of policy initiatives |
|-----------------------------------|--|
| PO1. A Smarter Europe | <p>The concept and methodology to make tourism destination smart can be seen as a comprehensive tool set to introduce innovative, efficient and digital tools, techniques and processes at the level of local tourism destinations in order to make the overall tourism sector more resilient and responsible.</p> <p>Smart Tourism destinations require a governance that connects the destination management organisations with other players of the tourism value chain. It will be crucial to involve actors from the public sector, and in particular local institutions with local competencies in tourism, but also tourism companies from the private sector and experts in big data generation, analysis and use.</p> <p>Smart Specialization Strategies can help to develop an innovation-friendly environment to tourism players and involve the complete value chain.</p> <p>Digital transformation of tourism play a relevant role in many initiatives, with specific needs in different fields of digital tools for marketing and communication, digital management support, use of Artificial Intelligence and big data for decision-making and monitoring, etc.</p> <p>Innovation centres and specific hubs (e.g. European Digital Innovation Hubs) have a huge potential to contribute to the digitalisation of tourism-related SMEs and tourism ecosystems.</p> <p>Intermediate entities such as Tourism Innovation Centres can become important actors in implementing other public policy tools to support innovation in the tourism value chain. They offer a huge opportunity to bring important players together.</p> <p>Business and innovation support schemes should be embedded in strategic frameworks and objectives to increase their effectiveness and contribution to wider objectives.</p> <p>Business and innovation support schemes require clear orientation and guidance for beneficiaries to manage their expectations and allow for capacity and skills development in line with product and process innovation.</p> <p>Business and innovation support schemes can be used to promote digitalisation in tourism SMEs and partnerships between tourism companies and digital service providers.</p> |
| PO2. A greener, low-carbon Europe | <p>There is a huge potential to promote circular approaches and reduce the generation of waste and wastewater through tourism.</p> <p>Local and regional authorities can have an important steering role and develop regulations to respect limits and carrying capacities of their own territorial resources.</p> <p>Working with the complete tourism ecosystem and other players (mobility, agri-food producers, energy generation, travel industry, cruise lines etc.) in the territory is key to become more climate-friendly as a destination and as a region.</p> <p>Support the design and implementation of sustainability strategies in tourism destinations and for the various tourism products. More sustainable tourism models can only be achieved when all relevant stakeholders work together and contribute to the objectives of reducing negative social and environmental effects.</p> |
| PO3. A more connected Europe | <p>Regions may use funding from EU recovery plans to develop cycling tourism infrastructure in their territories. After all, cycling is an environmental means of transportation and can be done while respecting social distancing rules.</p> <p>The EuroVelo routes offered an important framework and a concrete starting point to develop a comprehensive network with the support of a variety of players.</p> <p>Supporting alternative travel modes (train, bus) that are less CO2 intensive can support more sustainable tourism.</p> <p>Cruise ships and port infrastructure are still highly polluting. Projects to reduce the negative environmental effects will benefit a more sustainable tourism of many coastal regions and cities.</p> |
| PO4. A more social Europe | <p>Tourism is an instrument to promote local economic and social development. Most impact will be produced through integrated place-based approaches and the orientation towards a common mission, e.g. to become a more sustainable or climate-friendly destination.</p> |
| PO5. Europe closer to | <p>Facilitate that bottom-up initiatives can join larger projects.</p> |

| EU Policy Objective | Lesson learned from analysis of policy initiatives |
|-----------------------------------|--|
| citizens – integrated development | Create adequate spaces and opportunities for grass-roots initiatives to meet with innovators, digital experts, entrepreneurs, funders. |
| Horizontal | <p>Regional initiatives can boost developments at local level. But should leave room for bottom-up initiatives to blossom. Support can be given in form of capacity building, network moderation and on-going advice programmes.</p> <p>European territorial cooperation programmes (Interreg) may facilitate the development of this network across national borders.</p> |

Source: Own elaboration based on the database on policy initiatives

Overall, five lessons can be drawn from the analysis for the different territories:

1. Tourism is important for practically all regions. More and more policy initiatives reflect the value of tourism for local and regional economies and try to either increase the quality and effectiveness or reduce the negative environmental effects through specific policy measures. The COVID-19 crisis and the standstill of tourism in many European regions has shown how tourism affects regional economies and life in general. Both at the supply side (many people working in the sector have lost their job) and on the demand side (for many people no leisure activities were possible for many months). Most policy initiatives so far address the supply side and the overall value chain in form of destination management governance. There is still room to develop adequate measures that address the demand side and manage growth and the generation of local benefits. There is a need to straighten out and steer management of tourism flows, to set limits to uncontrolled growth of harmful activities and to empower the destinations to decide actively on which kind of tourism they want.

2. COVID-19 has shown that every place can be a tourism destination. Less-crowded rural destinations, national parks and other nature-related places, even the village just outside the big city, have been the winners of leisure and travel during the pandemic, mostly for domestic visitors. Probably they will stay very prominent in the next years and need professional visitor flow and destination management tools to continue representing sustainable and climate-friendly tourism. On this way, it is recommended to build the touristic offer on the natural and cultural identity of the region, to engage the small players distributed across the territory and articulate the governance of the tourism ecosystem to avoid harmful effects of massification. Larger cities should more actively engage with the surrounding territory to diversify attractions and create a nearby offer for residents.

3. There is a general trend to more sustainable tourism in the sense of reducing the negative effects of travel, accommodation, catering and activities on the environment. Tourism shall become also more responsible and respectful with the territory and local communities. Decarbonisation of tourism, as far as possible, is an objective of many new strategies and actions. Circular approaches should help to reduce the amount of waste generated by visitors and to increase the concepts of using resources more efficiently. Sustainability management should become a part of destination management and not be left to individual players or private initiative. This might require larger adaptations in public services and infrastructure. Some regions need to prepare their destinations already for the effects of climate change or develop adaptation measures for the next years.

4. Digital tools for tourists have come to stay and will boost digitisation also in non-health related areas. Digital travel certificates are still obligatory in many EU countries. The EU Digital COVID Certificate, national vaccination certificates and up-to-date information on safe travel conditions will probably become a usual travel accessory for the next months and years and might push even the use of smartphones for the still reluctant people. At the same time, many destination management organisations have used the mandatory business pause to further develop their market intelligence tools,

decision support systems, training schemes for digital skills, social media marketing instruments and online collaboration networks. Digitisation will be the backbone of many new policy initiatives.

5. An innovative and open mindset as well as creative ideas will be needed to adapt to change and prepare tourism regions for the future. Not only the public sector but also, the other players of the tourism ecosystem need to get engaged. Ideas and innovation as well as new partnerships should to be accelerated. Here, the public sector can play a role in the inspiration, motivation and support of ideas, innovations, pioneering networks and partnerships. Partnerships between the public administration, sectoral policies, public services, small and large private stakeholders in the regions and the big travel industry players without the region should be strengthened to prepare for the challenges to come.

These lessons can be applied to the different types of tourism regions:

- **Beach Beauty:** The sun & beach destinations are looking for more sustainable tourism, building on the positive examples that they are already developing for years. Negative effects of massification and dependence on travel industry players from outside the region can be overcome by tourism models and approaches that empower the destination. Tourism activities should generate more value and respect for the territory. Sustainability needs to be managed for the destination as a whole, solutions should not be left to individual initiatives or pilot projects. Tourism flows should be straightened out and steered by visitor management.
- **Jagertee:** Attractive mountainous regions need to prepare for the effects of climate change. Sustainability needs to be managed for the destination as a whole, solutions should not be left to individual initiatives or pilot projects. Regions should build on the natural and cultural identity of the territory to develop new visitor experiences. The distribution of many small tourism players across the territory demands a specific support to SMEs on their way to digitisation, decarbonisation, quality tourism and more sustainability.
- **Sea Breeze:** Coastal regions in Western and Northern Europe are becoming more and more attractive. They need to manage the increase in visitor numbers and expectations by companies on an ever-growing industry. At the same time, they need to avoid copying the Beach Beauty tourism model and should build on the natural and cultural identity of the territory to develop unique products and services. In many regions, an articulate destination management governance is still in its infancy and needs to be strengthened in view of the new challenges such as digitisation, decarbonisation, environmental effects. The distribution of many small tourism players across the territory demands a specific support to SMEs.
- **Spritz:** Rural regions and areas close to nature and national parks have been the winners of the pandemic, so far. In many regions, an articulate destination management governance is still in its infancy and needs to be strengthened in view of the new challenges such as digitisation, decarbonisation, negative environmental effects. The distribution of many small tourism players across the territory demands a specific support to SMEs. Regions should build on the natural and cultural identity of the territory to develop new visitor experiences. The unexpected increase of visitors in some vulnerable places with a limited carrying capacity make it necessary to monitor and steer visitors and set limited for growth of tourism in the region.
- **Sea meets Sky:** Europeans outermost regions face specific challenges when it comes to prepare for a sustainable and resilient tourism. Their dependence on air/cruise travel and on large travel industry players from outside the region as

well as the vulnerability against climate phenomena and natural disasters weakness the tourism value chain in these regions, despite their apparent attractiveness. Future policies should seek to empower the destination and develop capacities in the regions to manage resources effectively. Tourism activities should generate more value and respect for the territory. Tourism flows should be straightened out and steered by visitor management. The distribution of many small tourism players across the territory demands a specific support to SMEs on their way to digitisation, decarbonisation, quality tourism and more sustainability.

- **Cosmopolitan:** Urban tourism has largely suffered from the pandemic and not recovered yet. However, it is to expect that overtourism will repeat soon in many city destinations. Destination management organisations usually are well developed and equipped. However, they might need to develop more capacities to monitor and steer visitors and manage growth in the medium-and long-term future. City centres need to develop approaches to engage with the surrounding territory to distribute visitor flows and to create sustainable tourism experiences. Tourism should be used more often as a lever to act responsibly and to engage with residents. There should be more opportunities for visitors and residents to jointly generate benefits for the local community.
- **For all types:** It should be imperative for all types of regions to decarbonate and to reduce the negative environmental effects of tourism at all levels of the destination and the territory in which it is embedded. Digitisation and innovation will be inevitable as tools to implement the above-mentioned recommendations. Sustainable tourism follows sustainable territorial development. Tourism needs to be seen as important part of territorial planning and should be in continuous contact with sectoral policies such as transport, digital infrastructure and equipment, water and waste management, energy, public spaces and infrastructure.

4 Annex A: Individual case study reports

4.1 Circular Hotels Project in Spain

This case study report describes the approach of a busy tourism destination (Mallorca, Spain) to become more sustainable through the cooperation of different actors (hotels, local government, local farmers, waste management company) with the intention to reduce carbon emissions and increase local fruit and vegetable production and sales using a circular economy approach.

4.1.1 General information

Large numbers of tourists in a given area generate usually negative environmental effects on the territories. In this context, the production of waste from tourism is one of the issues of concern. For instance, about one third of the world 1.326 billion arrivals was generated in the countries surrounding the Mediterranean Sea in 2017. Even if this represents the main source of income for local economies, it generates a great burden on local infrastructure, for example, for the use of water, water sewage and waste management. Moreover, tourism can generate social and economic impacts on local populations, whereas the income generated by the tourism sector only partially benefits the local population. This creates challenging situations for tourism destinations, which must maintain revenues from the tourism sector, while ensuring that these also benefit the local population and contribute to the development of the whole territory.

The Circular Hotels project arose from the need to develop more sustainable tourism on the island of Mallorca, with the idea of developing a new tourism approach more respectful with the territory, both in its environmental dimension (CO₂ emission reduction, sustainable waste management) and in its social dimension (making the local population benefit from tourism). The idea of the project came from exchanges between TIRME, the main waste management company of Mallorca, and its clients, i.e. the island municipalities and hotels. The discussions led to the identification of three main needs:

1. The agricultural businesses of the islands were facing many difficulties due to the limited land availability which does not allow to produce big quantities and varieties of products. Consequently, big potential customers, such as hotels, preferred to buy imported products which are cheaper and offer more variety.
2. Some hotel chains in Mallorca wanted to build stronger relationships not only with the tourists but also with the locals.
3. Some of the hotel chains were also aiming to increase their sustainability and environmental awareness. They were already working closely with TIRME, in particular on plastic recycling.

At the time, TIRME was already cooperating with the agricultural businesses by producing compost, when they realised that they could include hotels in this process (e.g. using organic waste from hotels to produce compost), meeting the needs of different actors and developing a circular economy approach. This idea, in addition to increasing the environmental attention of hotel chains, would have created an added value for local production and a better quality of locally produced vegetables and fruit. At the same time, one of the main goals of the local government was to support local productions and the Circular Hotels Project offered the island farmers the chance to produce more and greener products with reduced CO₂ emissions.

Finally, this was a great opportunity for TIRME to gain visibility and make more people aware of the work they have been doing over the years for the environment, making the population more aware about the topic.

4.1.2 Description of the policy initiative

The project Circular Hotels (*Hoteles Circulares*) is an innovative initiative implemented in Mallorca with the aim to reduce waste and promote local products, with the main goal to develop new ways to manage tourism including a circular economy approach. Considering the urgent need to counterbalance climate change, an immediate adjustment of companies' natural resources management models is deeply required. The initiative intends creating a paradigm shift in the hotel industry supporting the transformation into a more sustainable growth and circular economy approach. This necessity is even more urgent in an insular context, represented by Balearic Islands, which have limited resources on have to ameliorate their use.

The project is completely funded by the different actors involved, which are all private entities, more specifically:

- TIRME (working on public concession), Mallorca waste management company, which is the main partner and is in charge of all the waste management and compost production.
- 4 Hotel chains (Riu Hotels , Iberostar , Meliá Hotels International and Garden Hotels), responsible for the implementation of a proper recycling system, raising awareness among the tourists, and which commit to buying vegetables and fruits from local producers involved in the circular system.
- 2 local farms, which use the compost provided by TIRME to grow their products and sell them to the hotels.
- Support from technological service provider such as the company Wireless DNA, for example for ensuring the digital monitoring of the waste/resources cycles and amounts.

The project was launched in 2019, and they had the chance to test it concretely over the summer during the peak tourism season. The project turned out to be very successful, they gathered a lot of useful data and all the hotels involved were glad to participate although it was more complicated and expensive for them (i.e. higher cost of fruit and vegetables purchased). During this first stage they had to sign several agreements to build contractual relationships among the partners and learn how to face the main problems, and to better coordinate the different activities performed.

Some of the hotel chains have received support from the island government (*Consell de Mallorca*) for the installation of IoT sensors which allow to measure the quantity of waste produced and how much compost they can get from it. This kind of services is provided by private companies such as Wireless DNA. The government of the island offered an important support in the implementation of this initiative, trying to satisfy all the request of the partners, because in Mallorca the administration would like to adopt the circular economy in different sectors.

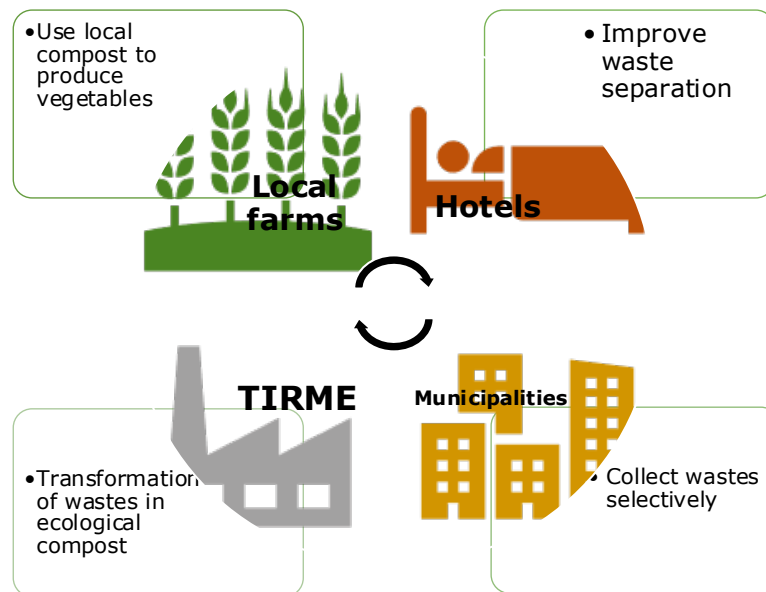
Each partner takes a specific role (**Error! Reference source not found.**), while Wireless DNA is responsible for supplying the measurement (IoT) sensors and the real-time IoT monitoring system for this project. Initially, a pilot project has been developed between TIRME and the hotel chain Meliá, financially supported by the island government, to develop the implementation of an innovative system for monitoring waste weighing. The *modus operandi* of the project has been adopted by the Circular Hotel project, and is structured in four complementary steps, as reported below:

1. **First step:** the fours chains educate their customers and train their employees to sperate food efficiently.
2. **Second step:** The City Council collects waste selectively and without mixing with other wastes.

3. **Third step:** TIRME manages the organic waste to transform it into ecological compost.
4. **Fourth step:** local farms (Agromallorca and Son March) produce vegetables to match Hostels requests thanks to the compost provided by TIRME.

The process adopted by the Circular Hotels project is illustrated by the following figure.

Circular Hotels framework



Source: Own elaboration from https://www.hosteltur.com/133024_hoteles-circulares-proyecto-piloto-en-mallorca.html

Regarding the involvement of Wireless DNA, the company is specialised in new technologies and IoT, and is in line with the project considering that it aims to take advantage of new technologies to identify and quantify organic waste generated in hotels. Such findings allow the partnership to generate direct savings and reducing food waste. In addition, part of this waste is then used as raw material (compost) to be returned to the production chain, providing benefits to local agriculture and distribution sector by increasing the supply of kilometre zero products in Mallorca⁹. The final goal was to "completely change the paradigm, because recycled products come back as a product"¹⁰.

Thanks to the technological support of Wireless DNA, TIRME could receive the number of tons of waste that each hotel generates and thus calculate how much compost is produced with that waste. This support was also used for the last phase of the cycle, which means farmer production. Thanks to the quantity of produced compost, Wireless DNA services help to understand the quantity of vegetables which can be produced by farmers per hectare. One of the goals of the process was that the hotels buy "at least" the same tons of product generated from organic matter and that in the hotel buffet the guests are informed that consumed products come from recycled wastes, to rise their awareness.

⁹ <https://www.mallorcadiario.com/tirme-y-cadenas-hoteleras-impulsan-un-proyecto-de-hoteles-circulares-mallorca> (consulted on 19 May 2021)

¹⁰ https://www.hosteltur.com/133024_hoteles-circulares-proyecto-piloto-en-mallorca.html (consulted on 19 May 2021)

Impact of COVID-19

COVID-19 caused a halt in the project as of summer 2020, considering not only the low tourist flow on the island of Mallorca, but also the changes of priorities for hotels which were (and still are) struggling to survive. Hotels had to cover extraordinary expenses and could not afford to invest in this specific project.

However, TIRME took advantage of this period to invest in the digitalisation of the project, developing a platform based on blockchain and gathering data from all the different involved actors and making them easily available for all the stakeholders. The platform will be launched in June 2021, and it will allow people to tangibly see which are the benefits of circular economy within this project.

The online publication of the results obtained until now will make the project gain visibility and will be crucial to build trust with the new potential actors that would like to join. For the same purpose, they also created a digital identity for each product reporting its carbon footprint, water footprint, biodiversity, circularity index, where and when the product was produced etc. Project partners plan to restart the project, maybe at a slower pace since the hotels are still struggling to get out of the crisis.

On the other hand, since TIRME is in charge of managing the waste of all hotels in Mallorca, in the next year they would like to see this circular hotel model adopted by many more (all) the hotels in Mallorca. In the meantime, they are planning to establish a start-up managing the digital platform mentioned above which could reach a larger audience and make the model replicable in other countries.

4.1.3 Larger Context

The project Circular Hotels is embedded into the following larger context that influences development on the island and in the sector:

- **Establishing Mallorca as sustainable destination:** convey the message that Mallorca is going towards a more sustainable tourism. The local government would like the island to be known by tourists for its circular hotels and its environmental awareness. This has to be seen in the overall context of the 'Mallorca Sustainable Tourism Observatory (STO)' which is a key new element of the island's strategy to preserve the destination and assess how the sector affects the natural environment, economy, and residents. The Observatory will systematically monitor the environmental, social and economic impact of tourism and so facilitate evidence-based decision making. Key objectives for the island's tourism sector include promoting a circular economy within hospitality, reducing the overall carbon footprint, and promoting local gastronomy to enhance Mallorca's reputation and increases its appeal. In June 2021, Mallorca joins UNWTO's network of sustainable tourism observatories.
- **Improve the sustainability of hotels:** the big hotel chains which are on the island have a high environmental impact, but their aim is to become more sustainable. They think sustainability is a value added which would convince potential tourists to choose their hotels over others.
- **Circular Agriculture:** making the products of the island greener and more valuable, boosting the growth of local farmers. Promoting circular and efficiency approaches in agriculture to reduce waste generation.
- **Improve relationship between tourism and the local environment:** increasing the connection between hotels, tourists and the local community.

Moreover, the initiative would like to become a "pilot test" at a larger scale which could be further extended. The director of TIRME stressed, in this perspective, that "*the idea*

is to try to extend Circular Hotels to the entire tourism sector on the island, because this generates local employment for farmers and a better social acceptance of the local population, with regard to what tourism activities can generate, so that they see that wealth is produced beyond the pure tourism sector".

According to TIRME, the project relates to larger strategies at national and EU level:

- **The EU Circular Economy Package:** this set of directives established 54 concrete and ambitious actions, with measures covering the whole life cycle: from production and consumption to waste management and the market for secondary raw materials and a revised legislative proposal on waste.
- **The Farm to Fork Strategy:** an EU strategy part of the European Green Deal aiming to make food systems fair, healthy and environmentally friendly.
- **Digitalisation strategies at national and European level.**

According to the partners, the Circular Hotels initiative is also contributing to 10 out of 17 Sustainable Goals (SDG) established by the United Nations, especially those of innovation sustainable communities, responsible production and consumption, climate action and alliances to achieve the objectives.

The pilot project fits well into two current regional initiatives. First the Circular Economy Strategy for the Balearic Islands (under development). Second, the Mallorca Sustainable Tourism Observatory (STO).

4.1.4 Lessons learned

The key success factor of the project is the strong willingness, demonstrated by the actors involved, to collaborate, trust each other, and implement this project together. This was essential to reach the desired objectives since the implementation of the circular model required considerable efforts in both economic and organisational terms, impacting their logistics chains. The success of the initiative depended also on the strong commitment to sustainability which allowed to create value for the local products making them greener, and the presence of already suitable and ready-to-use infrastructure (owned by TIRME) such as waste disposal plants, industrial composting facilities and a recycling plant.

Finally, the support of the local government was also crucial: Consell de Mallorca tried to meet all the requests of the partner to make the implementation as smooth as possible, as the island wants to expand the circular economy model to many other sectors in the next years.

The main difficulty encountered by the project during the implementation phase was making the cooperation between so many different actors smooth, especially with regard to food supply to hotels from the local farmers. This model implies many logistics problems for the partners (e.g. the farmers have limited production which cannot always satisfy the demand from hotels). However, the biggest obstacle was related to the cost of sustainable products which are much more expensive for hotels to buy. It was therefore crucial to convey the right message to hotels regarding the added value of purchasing such products and ensure their high quality and sustainability which could justify the higher price.

4.1.5 Conclusion

The Circular Hotels project is a response to waste issues related to mass tourism on the island of Mallorca. The main goal of the project is to allow tourism to produce concrete positive impacts on local population and on the environment. This project uses waste produced by hotels to transform them, with the support of TIRME, in compost for local

farmers who will produce vegetables for those hotels. By adopting this logic, mutual benefits between sectors (tourism, waste management, agriculture) can be produced.

The intention of the lead partner TIRME is to scale up the project to include more hotel chains, as well as other key players in the HORECA sector. Considering the type of circular economy model developed by Circular Hotel Project, the initiative could be transferred to other similar contexts across the EU.

As regards potential funding through EU programmes, this type of initiatives could be developed especially under PO 2, Specific Objective 2(vi) dedicated to circular economy.

Looking at the Spanish National Recovery and Resilience Plan published on 27 April 2021, the Circular Hotel project activities are in line with the two first general objectives of the Plan. Indeed, the first objective is to boost a **green transition in Spain** (including a better waste management), while the second objective aims to boost **digital transformation in the country**, in line with new technologies developed by DNA Wireless in the scope of Circular Hotels.

4.2 EcoBnB Platform for sustainable tourism – Successful outcome of the EU-funded project EcoDots

This case presents the EcoBnB Platform (www.ecobnb.com) for sustainable tourism that emerged out of the EU-funded project EcoDots. The case shows some key elements to define and boost sustainable tourism.

4.2.1 General information

The competitiveness of the tourism industry is closely linked to its sustainability. At the same time, the quality of a tourist destination is also strongly influenced by its natural and cultural environment and its integration with the local community. For this reason, the development of a more responsible tourism, through the reconciliation of the economic growth and the sustainable development of a territory, is pivotal.¹¹

To face this challenge, in 2013 the EU Entrepreneurship and Innovation Programme (EIP) within the Competitiveness and Innovation Framework Programme (CIP) launched a call for transnational projects to support the enhancement and promotion of sustainable transnational thematic tourism products¹². This call had two overall objectives: on the one hand, the co-funded actions had to support the enhancement and promotion of sustainable transnational thematic tourism products contributing to the development and promotion of sustainable tourism in Europe by improving their visibility and market uptake; on the other, they had to contribute to the creation of an environment favourable to transnational co-operation among tourism-related stakeholders with a particular emphasis on SMEs.

In order to reach the above-mentioned objectives, the EC set-up four eligible requirements to develop such initiatives, in particular, the co-funded projects had to¹³:

- **Be transnational:** covering at least four countries.

¹¹ <https://ecobnb.com/blog/2014/06/ecodots-european-commission-funding-sustainable-tourism/> (consulted on June 1st, 2021)

¹² https://ec.europa.eu/growth/content/supporting-enhancement-and-promotion-sustainable-transnational-thematic-tourism-products_en (Consulted on June 1st, 2021)

¹³ *Ibidem*

- **Be thematic:** a transnational product had to be conceived, structured, and developed around common theme.
- **Be already developed:** The aim was to support the market uptake of the products that have already achieved a certain development stage (e.g. at least they shall already have a concept/action plan, some development activities, and a stakeholder network). The applicants have the responsibility to provide the description and evidence about the above-mentioned required information. For this purpose, the project proposals have to include a thorough description of the sustainable transnational thematic tourism product indicating the actions implemented so far and the development level achieved by the product as well as its potential for further tourism development.
- **Have high potential** for the development of sustainable tourism.

This call brought to the co-financing of six projects¹⁴, among them **EcoDots**, coordinated by La città invisibili association (Italy). EcoDots¹⁵ aimed to create a platform to promote sustainable tourism in Europe, in particular to connect responsible travellers with entrepreneurs investing in a better future, through the creation of an online platform at European level, i.e. European Green Travel. Its specific objectives were:

- Build an innovative network of sustainable accommodations and “green” itineraries in Italy, Austria, Switzerland, Germany, Slovenia and Serbia.
- Promote the demand of sustainable tourism in Europe.
- Involve green accommodations sharing an eco-tourism vision, in order to enhance their visibility on the market and transfer good practices.

As one of the most successful EU projects, EcoDots achieved to create a sustainable commercial, market-ready spin-off company, which is still operating and has successfully expanded into other countries of the European market.

4.2.2 Description of the policy initiative

EcoDots was an EU co-funded project with an 18-month duration, aiming to promote sustainable tourism across Europe. The concept comes from the Viaggi Verdi initiative (Green Travels) created in 2012, the Italian community of sustainable tourism. The EcoDots project aimed to extend its actions over six countries, four of which were EU countries (Italy, Austria, Germany, Slovenia), while the remaining two non-EU ones (Switzerland and Serbia). To implement its actions, the project involved eight institutional and private partners, led by the Italian Association “Le Città invisibili”. The project had a budget of EUR 330,689 (of that EUR 248,016 EC contribution).

A new platform (working name initially: Green Travel Europe) was expected to be the main output of the EcoDots project and aimed to form a community dedicated to sustainable tourism which offers travellers from all over the world the opportunity to find and book a sustainable vacation with a limited (or neutral) effect on nature. This platform was then created in 2015 under the commercial name EcoBnB, to be similar to the new AirBnB platform.

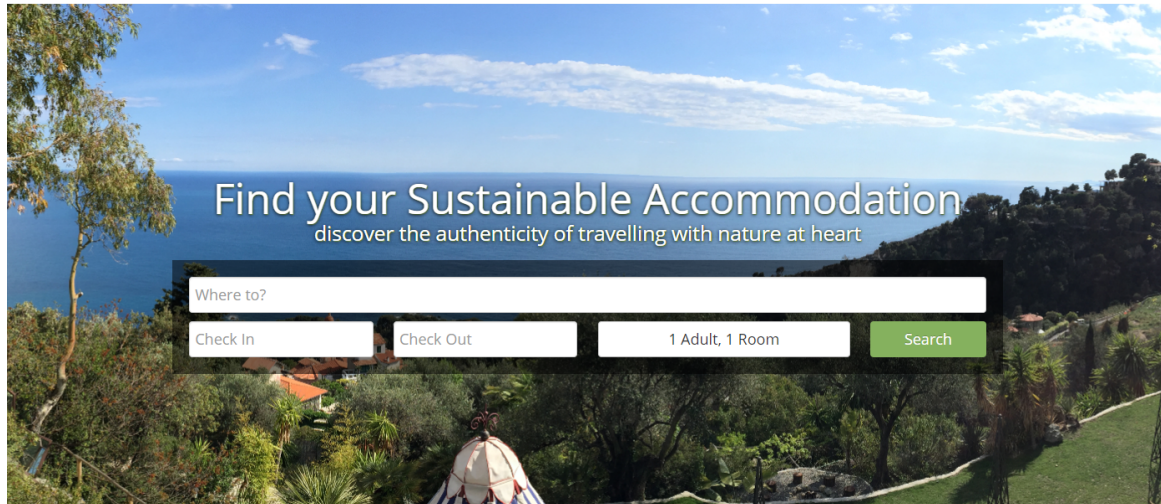
In operational terms, EcoBnB is implemented through an online platform (www.ecobnb.com), which has been structured as a marketplace where it is possible to book any kind of environment-friendly accommodation (organic houses surrounded by nature, organic Bed & Breakfast in historical villages, tree houses, ice-igloos, bio hotels

¹⁴ https://ec.europa.eu/growth/sectors/tourism/offer/sustainable/transnational-products_en (Consulted on June 1st, 2021)

¹⁵ <https://ec.europa.eu/docsroom/documents/5299/attachments/1/translations/en/renditions/pdf>

with a small impact on the environment, chalets and mountain retreats without CO2 emissions). The platform highlights the sustainability requirements for each bio hotel, farmhouse, bed and breakfast or apartment.

EcoBnb online platform



Source: <https://ecobnb.com/>

The EcoBnB platform allows eco-friendly accommodations to underline and promote their ecological quality, facilitating the establishment of contacts with potential customers, as well as sharing a more global challenge aiming to develop sustainable travelling. To have access to EcoBnB services, accommodations have to meet 10 specific requirements listed on the platform, as reported in the following figure.

Requirements for an accommodation to join the EcoBnB platform.



Source: <https://ecobnb.com/blog/faq/> (consulted on June 1st, 2021)

Regarding the 10 above mentioned requirements, the following features for each dimension can be listed:

1. **Organic Food:** the accommodation has to use mostly organic food, labelled, in the composition of menus for tourists, and to avoid GMO products.
2. **Green Building:** the accommodation has to be sustainable, which means it must have a high level of energy efficiency with an annual consumption of less than 60 Kwh/mq, as well as being well integrated in the landscape.

3. **100% renewable energy:** the energy used by EcoBnB accommodations have to be fully produced by renewable energy sources such as wind, solar, geothermal etc.
4. **Solar thermal panels for hot water production:** The accommodations have to produce hot water from renewable energy, using solar hot water systems. Solar hot water heating systems may be used also for pool and indoor heating through an underfloor heating system.
5. **Ecological cleaning products:** EcoBnB accommodations have to use non-harmful products for the cleanliness of rooms, laundry, and dishes have to be made from natural products. Detergents used to clean the accommodation and dishes have to be highly biodegradable and environmentally friendly.
6. **More than 80% waste recycling:** Waste (residual waste, paper, plastic, metal/aluminium, organic waste) is separated, recycled, and disposed of in an appropriate manner. The touristic accommodations have to exceed 80% of waste differentiation. Furthermore, bins for recycling paper, glass, plastic, and cans must be available to guests in public areas, since waste separation reduces non-recyclable waste and costs for disposal. Respective bins and information must be made available to guests.
7. **Car-free accessibility:** each EcoBnB accommodation has to be reachable without using a car, which means that the accommodations must be located nearby public transportations stops or have to provide a shuttle service.
8. **Energy saving lights:** the accommodation must reduce electricity consumption using energy-saving lamps.
9. **Water flow reducers:** The accommodation must reduce water consumption using water flow reducers. Water flow restrictors are nozzles which are attached to water tap to reduce the amount of water to 6 liters pro minute or less, and to strengthen the water jet. Therefore, water flow restrictors reduce the water consumption. The touristic accommodation also promotes awareness-raising among guests to save water.
10. **Recovery & reuse of rainwater:** The accommodation is recovering and reusing rainwater. Rainwater is collected and reused for secondary uses (toilet flush, garden irrigation, etc.).

In addition to these 10 requirements, accommodations part of the EcoBnB network are invited to promote sustainable initiatives in their accommodations such as bicycle rental services, promoting regional food, providing environmental-friendly furniture, using local vegetation to promote local biodiversity, avoiding disposal packaging, using fair trade products, etc.

Today, EcoBnB is a community of almost two million travellers, more than 700,000 page views per month and over 3 thousand eco-sustainable accommodations in more than 55 countries around the world. On their blog, they show experiences in contact with nature, green itineraries and lesser-known destinations, slow journeys, on foot or by bicycle, authentic life experiences. EcoBnB addresses travellers interested in sustainable tourism and experiences in contact with nature, routes to rediscover lesser-known corners of countries, slow journeys, on foot, by bicycle or on horseback, and holidays to rediscover the traditions (including culinary).

Achievements of EcoBnB community in March 2021



Source: <https://ecobnb.com/blog/media-kit/> (consulted on July 1st, 2021)

4.2.3 Larger Context

In 2017, EcoBnB was awarded by the United Nations World Tourism Organisation (UNWTO), in the category Innovation in enterprise¹⁶. This award reflects the efforts done worldwide by the tourism community to foster innovation and the need of the sector to advance towards a more sustainable and responsible future. This provided an international visibility to EcoBnB initiative.

In 2018, EcoBnB received a co-financing for the implementation of the booking system. The booking innovation project has been implemented as part of the ERDF 2014-2020, the Programme of the Province of Trento, with the contribution of the European Regional Development Fund and the European Union. After that, the break even allowed to further grow without further public funding.

Sustainable tourism has been a major trend in the travel and tourism industry for the last five years, with important growth figures until 2020 (when the COID-19 crisis broke out). Even in 2020 and 2021 sustainable tourism in rural and natural areas seems to be one of the few market segments with less losses and even growth during the pandemic.

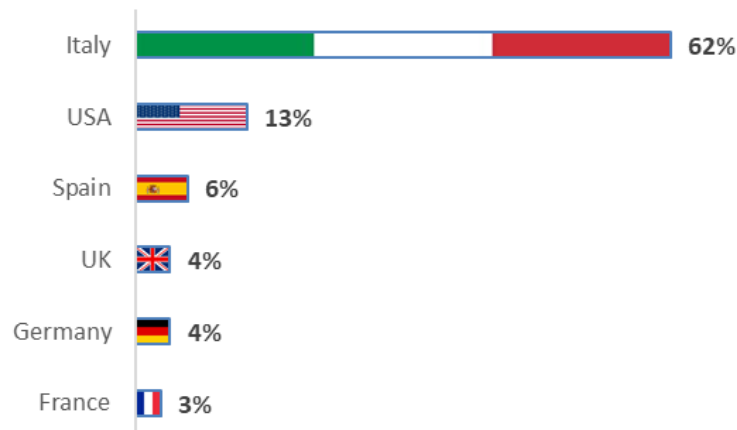
Monitoring data published on the EcoBnB website¹⁷ confirms this trend. The website registered an important increase of its frequentation during 2020, considering that 2.75 million new users have consulted the website.

Regarding the nationality of platform users, the market is growing. Although after its start focussed on Italy it still has a large proportion of Italian users (62%), already 13% of users of EcoBnB come from USA, while shares of users mostly from the EU (Spain, Germany, France) or Europe (UK) are growing, as reported in the following graph.

¹⁶ <https://ecobnb.it/blog/2017/01/unwto-awards-turismo-sostenibile/> (accessed on 1 June 2021)

¹⁷ <https://ecobnb.it/blog/media-kit-viaggiverdi-collaborazioni-numeri/> (accessed on 1 June 2021)

Origin of EcoBnB users



Source: author elaboration based on <https://ecobnb.it/blog/media-kit-viaggiverdi-collaborazioni-numeri/> (Accessed on 1 June 2021)

4.2.4 Lessons learned

The EcoDots experience and the success of EcoBnB indicates how EU funding can help boost and up-scale projects with limited budget and geographic scope, e.g. initially implemented at local or national level, on a broader European level.

The strength of this initiative lies in the ability of the EcoDots lead partner to take an idea such as the 'Viaggi Verdi' (green travel) sustainable tourism platform and form a transnational partnership to develop it to a larger scale and make it more competitive, i.e. by creating the European Green Travel web platform (then renamed EcoBnB).

The success factor of the project was bringing together three important initiatives and elements for EcoBnB: market recognition (with the Viaggi Verdi embryo), standards, community and itineraries for the sustainable accommodation owners to get recognition and certification (TourCert initiative) and the web architecture (former e-Turist initiative).

The durability of EcoBnB is also the result of the effort by its partners to find new sources of funding after the end of the EcoDots EU project and to make the platform increasingly self-sustained (through the fees paid by its members).

However, despite the transnational nature of the EcoDots project, EcoBnB still seems to be quite focused on the Italian market, as the number of website visitors (see above) and the accommodation offer suggest. This might be due to the location of its founding organisation, i.e. the former EcoDots lead partner, and the concentration of visibility campaigns on the Italian market (presence on Italian newspapers and media).

Another success factor is the creation of the EcoBnB community of green suppliers, facilitating the hosts the "greening" of their accommodation and services, as well as bringing more green companies on board along the tourism value chain. In the same context EcoBnB has managed to become a platform of platforms and establishing linked with other sustainable initiatives (sector and national ones), such as Green Sail, Green Key, Slovenia Green, Dalmatia Green, Bla Bla Cars, HowManyTrees. This has helped to build critical mass and to expand the number of cross-references in Internet and social media.

4.2.5 Conclusion

The EcoDots project allowed to further develop previous experiences (Italy Green Travel), and to enhance their contents. One of the main results of this experience is its strong capacity to sustain its actions over time, through the development of the EcoBnB platform, which has been growing to an important web platform for sustainable tourism in Europe.

Five years after the end of the EcoDots project, the EcoBnB platform has shown a strong capacity to sustain itself over time, having continued the project activities and found new source of financing, i.e. through the regional Rural Development Plan (EAFRD) and the ERDF operational programme (PO-FESR Provincia Autonoma di Trento) as well as subscription quota. The web platform has shown a capacity to reach international targets considering that 13% of its visitors comes from the USA, and that the initiative has been awarded at international level.

Looking into the future, the EcoBnB platform and other sustainable communities in other countries and regions could develop further spin-off projects in the framework of the new ESIF programming period 2021-2027, especially through financing under the Political Objective 5 "A Europe closer to citizens by fostering the sustainable and integrated development of all types of territories", as well as some more targeted actions under PO2 "A greener Europe".

Moreover, at national scale, considering the six missions provided by the Italian Recovery and Resilience Plan, some synergies can be pointed out, especially with Mission 1 (Digitalisation, innovation, competitiveness, culture and tourism) as well as Mission 2 (Green Revolution and ecological transition).

4.3 Tourism Innovation Centre NEST in Portugal

NEST is the name of a Tourism Innovation Centre based in Covilhã (Portugal). It is one key initiative within the national 2017-2027 'Turismo 4.0' Strategy.

4.3.1 General information

NEST is the name of a Tourism Innovation Centre based in Covilhã (Portugal). It is one key initiative within the national 2017-2027 'Turismo 4.0' Strategy.

The 'Turismo 4.0' Strategy was developed by the national tourism agency Turismo de Portugal and aims to promote entrepreneurship, support travel and tourism start-ups as well as foster innovation in tourism in the country. Turismo de Portugal acts as an advisory body and coordinator by promoting the establishment of alliances and partnerships between the different agents, facilitating the access to funding and offering training and strategic advice to SMEs. As a result, several initiatives have been launched since the creation of the strategy (e.g. NEST, FIT Programme - Fostering Innovation in Tourism), contributing to the fostering of an active entrepreneurial environment in the tourism sector in Portugal.

The strategy is the result of a large scale 9-month public consultation held in 2016 addressed to all tourism sector stakeholders and aiming to collect extensive feedback on the needs of the sector. Two main priorities emerged from this consultation: **sustainability** and **innovation**.

Regarding sustainability, the public consultation underlined the need to develop tourism sustainability in its:

1. social dimension, i.e. develop a tourism that benefits local citizens);

2. economic dimension, i.e. develop a tourism that produces wealth for the territory; and
3. environmental dimension, i.e. develop a tourism that does not damage the territory.

Regarding innovation, this has been identified in terms of technology, products and services.

To support the implementation of the strategy, NEST (Tourist Innovation Centre of Portugal) was launched in February 2019. Its main objectives are to promote innovation and research in tourism, give business support in developing a creative and innovative vision, promote the creation of new companies and new business models; identify new professional profiles in tourism; create training laboratories in collaboration with universities, tourism schools, incubators and knowledge centres; provide products and knowledge transfer to companies.

4.3.2 Description of the policy initiative

NEST has been created as key measure and support to one axis of the Tourism 4.0 strategy, aiming to bring Portugal towards new forms of tourism, especially in support of the shift towards more sustainability and innovation in the sector. In particular, the association intends to support the development of new business ideas, project development and experimentation as well as the empowerment of tourism SMEs in the field of innovation and the digital economy.

To this end, NEST was founded as a non-profit association on 18 February 2019, by eight members from the private and public sector: Turismo de Portugal, ANA Airports, Brisa Via Verde (Portuguese Highways), Google, Microsoft, Millennium BCP, NOS and BPI.

The establishment of NEST followed three main rules:

4. It had to be based on a public-private partnership;
5. It had to include partners from the technology/high-tech sector (Google, Microsoft);
6. It had to include Portuguese partners from *outside* the tourism sector (Millennium BCP bank, Brisa – Highways of Portugal, NOS – a key communication player in Portugal).

The eight members also represent the main financial contributors, equally contributing to NEST funding through fixed quota. Moreover, Turismo de Portugal initially supported the non-profit association with an additional investment of EUR 686,000 between May 2019 and April 2021. Furthermore, NEST is financed by its associates and stakeholders of the tourism sector such as hotels, tour operators, associations etc.

In order to support its activities in the medium-term, NEST is also currently applying for EU funding, in particular through the COSME Programme and in the framework of Digital Innovation Hubs (Horizon 2020). Turismo de Portugal, in addition to providing tools and supporting NEST with data collection and training, also provides financial assistance through support to venture capital for start-ups.

Structure

NEST has developed a well-structured organisation to implement its activities and is managed by three main bodies:

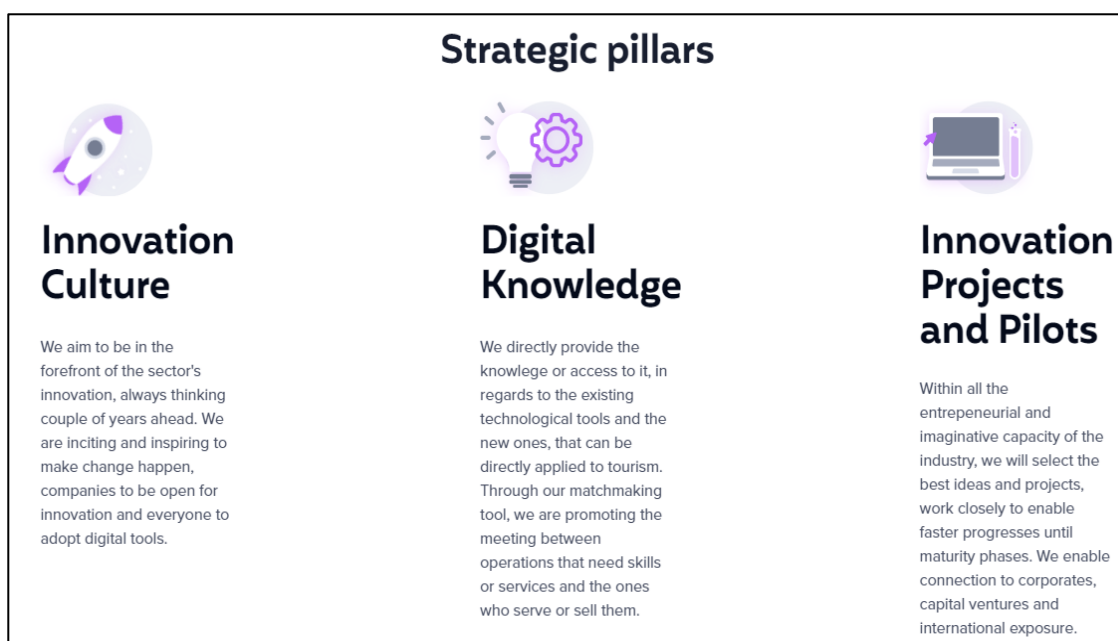
- **Executive Team:** composed by 4 members and the president (CEO).

- **Board of Directors:** in charge of issuing the annual plans which are then implemented by the Executive Team. This body meets monthly to discuss the progress towards the NEST strategic goals.
- **Strategic and Sectorial Committee:** composed of partners and industries taking part in NEST.

Objectives

NEST is based on three pillars: innovation culture, digital knowledge and innovation projects and pilots. As illustrated in the figure below, the innovation culture pillar mainly aims to promote innovation in tourism sector; the digital knowledge pillar aims to raise awareness of knowledge in the field and ease their use by tourism actors, while the last pillar, dedicated to innovation projects and pilots, contributes to identifying good practices in the sector and support their growth.

NEST Strategic pillars



Source: <https://www.nestportugal.pt/about-us>

Activities and services

So far, NEST has developed a set of actions structured on three pillars: innovation culture, digital knowledge and innovation projects and pilots. Based on these pillars, NEST developed three lines of services, i.e. challenges, resources and events.

Challenges. NEST identified four fields of challenges:

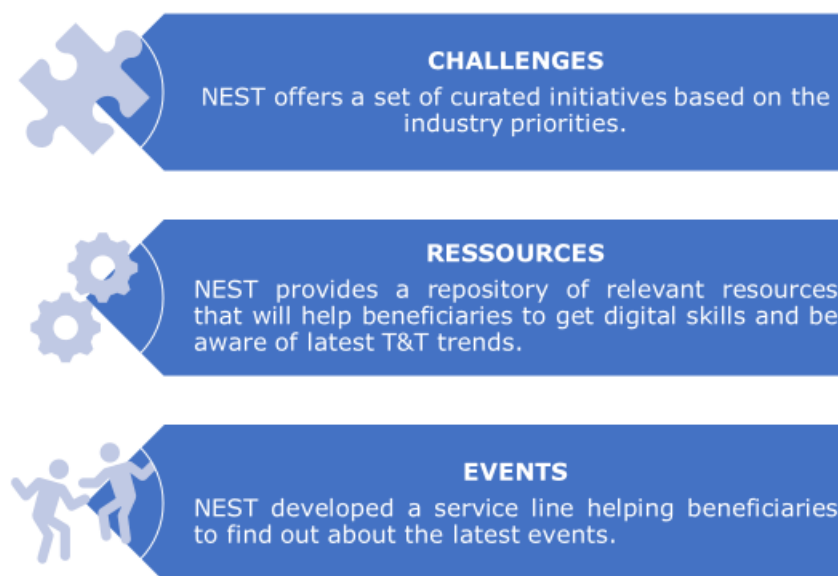
- **Social**, addressing the issues related to the ageing of the population.
- **Economic:** supporting the growth of sharing economy.
- **Planet:** addressing the issue of natural resource negative balance, i.e. developing activities which will not negatively impact the environment.
- **Technology:** catching the Internet of Things (IoT) potential to help resource management.

These identified challenges have one common point, which is to develop solutions improving people's lives in a sustainable way. One of the key elements to reach this goal, according to NEST, is the use of the digital dimension as an enabler.

Resources. NEST provides a database with useful resources for tourism actors to develop their activities, for instance providing toolkits for SMEs of the tourism sector¹⁸, webinars¹⁹, as well as useful information regarding communication, energy, water, waste, etc.²⁰.

Events. NEST offers a database of (and organises) events linked to tourism providing useful information. Due to COVID-19 NEST started to develop and offer a large series of Webinars for digital entrepreneurs in the tourism field.

NEST Services



Source: author's elaboration based on <https://www.nestportugal.pt/about-us>

Moreover, NEST has established three priorities which constitute the baseline for their services: **seamless experience**, **sustainability**, and **big data** (as exposed in NEST Priorities). The first priority aims to develop an accessible tourism offer in Portugal, but also prevent possible issues encountered by tourists (an integrated approach is needed between the tourism and technology sectors). To this end, NEST organises webinars to increase digital and technology capacitation in the tourism sector.

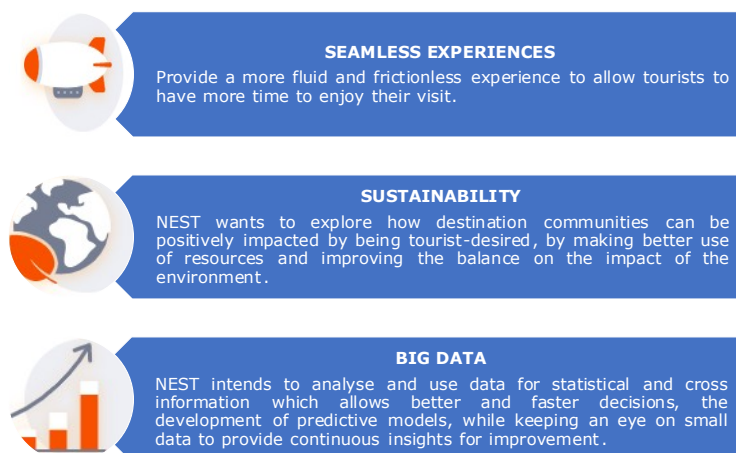
The sustainability priority aims to accelerate the innovation culture, supporting the adoption of digital tools and making them accessible to SMEs and start-ups, while the focus on big data intends to encourage SMEs and municipalities to collect data and use the collected information in their day-to-day management. This supports decision makers in taking informed and fast decisions, but it also allows to improve the tourist experience. To this end and to collect a large volume of data, Turismo de Portugal is funding a free Wi-Fi service in two-thirds of Portuguese municipalities.

¹⁸ <https://www.nestportugal.pt/resources/tourism-toolkit-nest-para-pmes/> (consulted on May 28th, 2021)

¹⁹ <https://www.nestportugal.pt/resources/webinars-kit/> (consulted on May 28th, 2021)

²⁰ <https://www.nestportugal.pt/resources/sabias-que/> (consulted on May 28th, 2021)

NEST Priorities



Source: author's elaboration based on <https://www.nestportugal.pt/challenges/>

On the basis of above-mentioned priorities, several projects have been developed by NEST, such as the **Living Lab Setubal**, which aims to plan the "Hotel of the future". This project also involved Master Card and a number of selected start-ups.

4.3.3 Larger Context

NEST is considered the anchor project of the Tourism 4.0 Strategy²¹, part of the Portuguese Government's strategy 'Industria 4.0' aiming to accelerate 4.0 industries through Portuguese business actors. The Tourism 4.0 strategy mainly aims to empower Portugal as a global innovation hub in the tourism sector, promoting an ecosystem of cooperation technological and business²². The objectives of NEST are in line with this goal, considering its capacity to develop tourism from a multiple perspective (technological, environmental, social).

NEST also aims to establish broader cooperation in the tourism sector through international collaboration, but also with cooperation with other sectors.

Regarding the internationalisation of NEST, their portfolio²³ shows many international collaborations with European accelerators and incubators. However, it is worth noting that NEST would like to widen its network of partners in the next years, especially in the EU, considering that its biggest partner is currently based in Israel (Innovative Israel).

Regarding the diversification of its activities, NEST has developed an important collaboration with a Portuguese top-rank medical Universities (Nova Medical School). The two entities formed a consortium to develop a dedicated laboratory for health in tourism, with three areas of development:

²¹ <http://business.turismodeportugal.pt/pt/Conhecer/Inovacao/turismo-4-0/Paginas/default.aspx> (consulted on May 29th, 2021)

²² <http://business.turismodeportugal.pt/pt/Conhecer/Inovacao/turismo-4-0/Documents/Turismo40-apresentacao-LA-2017.pdf> (consulted on May 29th, 2021)

²³ <https://www.nestportugal.pt/portfolio> (consulted on May 28th, 2021)

1. **Education:** the first advanced course which combines health and tourism, to start in September 2021.
2. **Innovation:** technical studies addressed to start-ups will be produced by the university, aiming to find solutions to identified needs.
3. **Community:** knowledge will be transferred to decision makers and the business sector; the 'Clean & Safe' programme developed by Turismo de Portugal (to ensure safe travel during COVID-19) will be further developed into new areas of application, i.e. beyond the pandemic.

This innovative cooperation will enable NEST to develop health and medicine tourism, which could represent an opportunity for the country, especially in the context of the pandemic and beyond.

4.3.4 Lessons learned

A year after NEST was launched, the COVID-19 pandemic broke out and caused severe consequences on the tourism sector at global level. It should be highlighted, however, that the pandemic has contributed to the success of NEST: the crisis has stressed the need for innovation and an increased use of technology in a wide range of sectors, including tourism. This represented an opportunity for NEST to step up and increase their growth, considering that their strategy was already in line with needs arisen with the pandemic. As of March 2020, NEST has become more visible to potential beneficiaries and to the general public thanks to the increased online presence (social media) and the organisation of online events. Many companies have expressed an urgent need for technological upgrades to improve their communication with their customers and their efficiency in order to lower operating costs. Moreover, NEST used the year 2020 to organise several online trainings about sustainability, digitalisation, cleanliness and safety which were attended by more than 20,000 participants. The current biggest challenge for NEST is to match the beneficiaries' expectations and keep growing at this fast pace. Even if companies, especially SMEs in the tourism sector, are still suffering from the current situation, it is crucial not to stop trying to seek innovation in the field.

Moreover, focusing on lessons learned since February 2019, NEST has identified four key success factors:

- 1) The nature of the public-private partnership and the variety of its members, including the attention to both the global and local dimension.
- 2) The interest and involvement of stakeholders, considering that more than 50 SMEs have become NEST associates in 2020 alone.
- 3) The strong presence of the association on social media (YouTube, LinkedIn Facebook, Instagram and Slack) helping to boost the visibility of the initiative.
- 4) The participation to many EU forums of discussion, allowing partners to gather useful information.

NEST also underlined some aspects that could be improved in the future.

One of the main ones is related to public funding, in particular considering that the association has recently been refused funding under a call of the Portugal 2020 SIAC programme (multi-fund programme under ESIF) because the association was established only two years ago (exclusion criteria related to the number of years of activity). NEST considers that more financial resources should be provided to newer actors in the tourism sector which show a clear roadmap, goals and vision, rather than focusing on the years of activity. The association also considers that EU communication on funding opportunities has to be enhanced to facilitate access to funding opportunities in the tourism sector.

Finally, NEST believes the tourism sector would benefit from the availability of more networks with other tourist associations coordinated at EU level. The current existing networks are very attached to the academic world rather than to strategic and operational players. Opening up and encouraging discussions and networking among associations and private-public partnerships at EU level would be beneficial.

4.3.5 Conclusion

The NEST initiative is an innovative solution, developed at national level and aiming to provide new approaches in Portuguese tourism. To do so, the NEST initiative aims to develop tourism through a threefold logic (Seamless experiences, Sustainability and Big Data) to improve tourists experiences and develop positive impacts on territories. To reach its goal Turismo de Portugal constituted a partnership bringing together various actors at national (Turismo de Portugal, NOS, Brisa Via Verde), and international (Google, Microsoft) level, from the private and the public sector.

The COVID-19 crisis represented a challenge for the initiative, considering that tourism sector has been deeply impacted by the pandemic situation. However, it also represented an opportunity for NEST initiatives, enhancing the use of digital tools. There was clear demand for learning more about digital tools during the pandemic.

The NEST concept is transferable to other Member States. In this sense, Turismo de Portugal would like to strengthen its collaborations on a European scale and present the initiative to a wider audience.

At EU level, this kind of initiatives could be supported through directly management funds (such as the new Single Market programme), or through ESIF, i.e. under PO1 ('A smarter Europe) and PO4 ('A more social Europe'). Regarding the Portuguese National Recovery and Resilience Plan, some priorities could be an opportunity to further develop NEST, especially under 'Enterprises 4.0', within the 'Digital transition' pillar.

4.4 Establishing Varna as a Smart Tourism Destination (Bulgaria)

This case presents the Smart Tourism Destination (STD) methodology. It can be seen as a comprehensive tool set to introduce innovative, efficient and digital tools, techniques and processes at the level of local tourism destinations in order to make the overall tourism sector more resilient and responsible. The method was proposed by researchers to convert Varna in Bulgaria in a smart tourism destination.

4.4.1 General information

In an increasingly globalised and competitive tourism sector, the management of tourism destinations has been developing innovative and sustainable strategies to ensure the best possible results over time. Innovation in the tourism sector is linked to the use of information and communication technologies (hereafter ICT), which has transformed the sector's *modus operandi* through changes in the forms of organisation, processes and products of companies providing tourism services, as well as new consumer-tourist demands (E. Signalat-Signes et al., 2019). In addition, the growth of the tourism sector (up to March 2020), as well as the increase in the number of visitors, has given rise to new issues, in particular linked to over tourism. The concept of sustainable tourism is now a subject of attention of most tourist destinations, so that the activities of the sector do not negatively impact the territories, and, in particular, that tourism can benefit the local communities and economies.

Smart tourism destinations can be defined as "*tourism-oriented and innovative space accessible to all, which is consolidated on a cutting-edge technological infrastructure, which must guarantee sustainable territorial development while facilitating visitor*

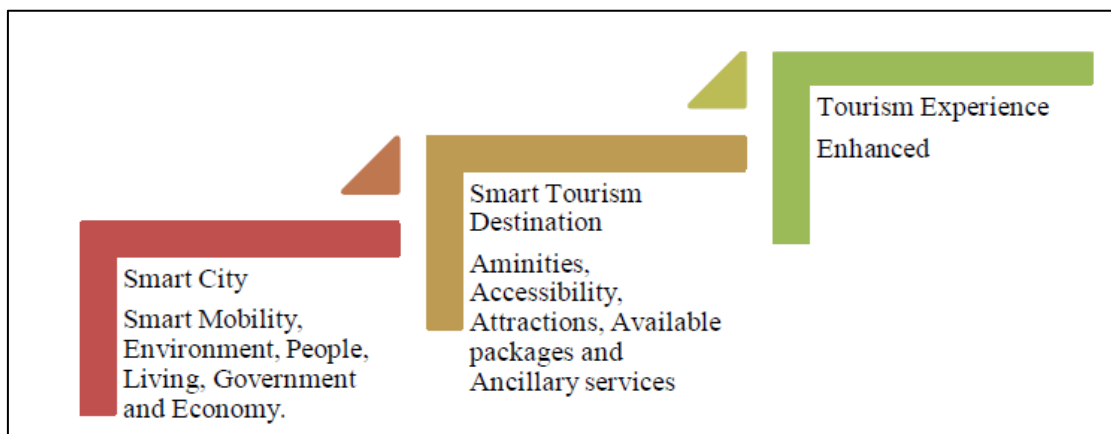
interaction and integration with the environment, increasing the quality of their experience in the destination and the quality of life of the residents"²⁴.

This concept arises from that of 'smart cities', referring to a city in which social investment, human capital, communications and infrastructure coexist in harmony with a view to promoting sustainable and efficient socioeconomic development, relying on the use of ICT²⁵. The ICT dimension represents a key aspect in tourism transformation, especially in terms of city and destination management through intelligent technologies. Therefore, the concept of smart city is at the basis of the smart tourism destination approach. As a reminder, the concept of smart city is based on six pillars, which all together contribute to the transition to a balanced and sustainable city:

- **Mobility:** improvement of people's mobility as well as transports itself.
- **Governance:** development of a smart and digitalized administration governance, increasing cooperation with citizens and increase their participation.
- **Population:** promotion and adoption of new technologies by citizens.
- **Quality of life:** promotion of a better quality of life with a high level of public services.
- **Economy:** improvement of innovation, creativity and productivity.
- **Environment:** promotion of efficiency and optimisation of energy consumption, recycling and reduction of harmful emissions.

Technologies and innovation are essential ingredients to make tourism destination management smarter. Indeed, the use of digitalisation and new technologies allows to capture the data related to tourism and the data left by tourists visiting the place, with a view to providing tailormade services in real time, while leveraging them to optimise strategic management, enabling the improvement of the tourist experience.

Figure 1 From smart city to smart tourism destination



Source: Buhalis, D., & Amaranggana, A. (2015). Smart tourism destinations enhancing tourism experience through personalisation of services. In *Information and communication technologies in tourism 2015* (pp. 377-389).

However, after the COVID experience and its effects on tourism, the call for not only smart but even a 'wiser' destination management get louder. This wise destination management should be based not only on digital tools and efficient processes, but also on understanding and respecting of (social and environmental) limits for a sustainable tourism within a given territory: *"In fact, one of the defining characteristics of wise tourism destinations will be in their ability to build on this wider more regional concept of smartness by going beyond the urban sphere and creating symbiotic relationships*

²⁴ Informe destinos turísticos inteligentes: construyendo el futuro, in the SEGITTUR Technical report (López de Ávila, A., et al. (2015).

²⁵ Transition towards a tourist innovation model: The smart tourism destination Reality or territorial marketing? (E. Sigalat-Signes et al., 2019)

with nearby 'smart villages' [...], which would close the loop of smart tourism research by linking the urban with the rural using a more integrated regional approach."²⁶

The Smart Tourism Destination concept is rather widespread today in Spain and Latin America, while other European countries still start to apply the STD methodology. An interesting proposal comes from two researchers who analysed the case of Varna in Bulgaria and how it can be transformed into a smart tourism destination²⁷. This is an interesting example of knowledge transfer from one European country to another.

4.4.2 Description of the policy initiative

The concept of 'Smart Tourism Destination' (hereafter STD) was developed on behalf of the Spanish Government by SEGITTUR (National Agency for the Management of Innovation and Tourism Technologies), developed the STD methodology. The STD approach is a pioneer initiative which intends to implement a new model for improving tourism competitiveness and development based on governance and tourism co-responsibility. This initiative was developed in 2012 and included in the National Tourism Plan Spain 2012-2015, aiming to generate the appropriate mechanisms to facilitate the rapid incorporation of innovations in tourism destinations.

The transformation into a Smart Tourism Destination involves the revaluation of the destination through innovation and technology, looking for some fundamental results:

- An increase in competitiveness, thanks to the better use of its tourism resources and the identification and creation of others.
- An improvement in the efficiency of production and marketing processes.
- A boost to the sustainable development of the destination in its three aspects: environmental, economic and socio-cultural.
- An improvement in the quality of stay of visitors and the quality of life of residents.
- To make the tourism strategy the basis for the economic dynamization of the territory, guaranteeing its positive effects in the long term.

Figure 2 Five Axes and main fields of analysis of the STD methodology

| Governance | Innovation | Technology | Sustainability | Accessibility |
|--|---|--|---|---|
| <ul style="list-style-type: none"> • Strategic vision and implementation • Efficient destination management • Transparent, participatory and open management • Responsible and controlled management | <ul style="list-style-type: none"> • Innovation in processes • Innovation in products and services • Marketing and commercialisation • Training | <ul style="list-style-type: none"> • Governance technologies • Marketing technologies • Technological infrastructures at destination • Tourism Knowledge Systems | <ul style="list-style-type: none"> • Management of touristic sustainability • Conservation of cultural heritage • Conservation of the environment • Social and economic development | <ul style="list-style-type: none"> • Regulatory framework • Management of accessibility • State of implementation • Technological tools |

Source: author's elaboration based on SEGITTUR (2020): Líneas estratégicas del modelo de Destino Turístico Inteligente de Isla de Tenerife. <https://www.webtenerife.com/es/corporativa/que-hacemos/actuaciones-destino/dti/documents/informe-ledti-tenerife.pdf>

²⁶ Coca-Stefaniak, J.A. (2020), "Beyond smart tourism cities – the need for a new generation of 'wise' tourism destinations", Journal of Tourism Futures.

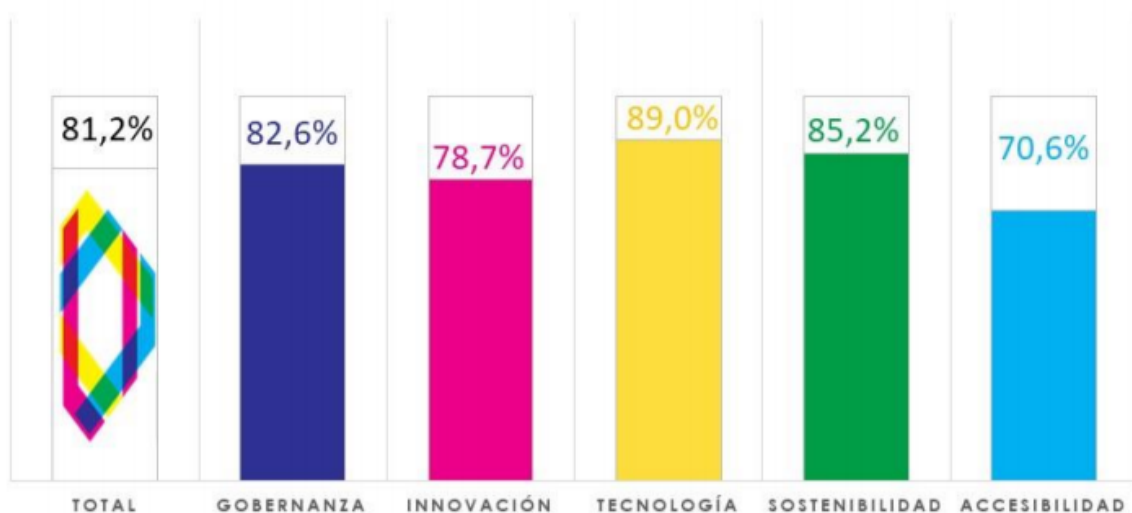
²⁷ K. Kostadinova Popova & M. Malinova Malcheva (2020): Assessment of the potential of Varna city as a Smart Tourism Destination, TOURISM, vol.68/No.3/2020/pp. 308-321

The Smart Tourism Destination methodology is based on the analysis of destinations around five axes: governance, innovation, technology, sustainability and accessibility, promoting an integrated vision of the territory including all areas of management and all stakeholders that influence and participate in its development.

The methodological process is divided into two cycles: the first, diagnosis and planning, responds to the need to make a comprehensive diagnosis of the destination, thus knowing the starting point, in order to go on to design an action plan that integrates the destination's own strategy for its transformation into a Smart Tourism Destination. In the characterisation, indicators and information related to the tourism sector or directly influencing it are selected. For the evaluation of requirements, a battery of more than 400 items is used, grouped into 20 areas of evaluation for the five axes of an ITD: governance, innovation, technology, sustainability and accessibility.

Cycle two, execution and monitoring, is where the necessary actions to achieve the Smart Tourism Destination distinction are materialised through the implementation of the action plan. From this point onwards, the destination enters a process of continuous improvement that will guarantee its capacity to successfully face the challenges and transformations posed by the new economic, social and technological environment.

Figure 3 Example of the results of an STD in-depth analysis of a destination



Source: author's elaboration based on SEGITTUR (2020): Líneas estratégicas del modelo de Destino Turístico Inteligente de Isla de Tenerife. <https://www.webtenerife.com/es/corporativa/que-hacemos/actuaciones-destino/dti/documents/informe-ledti-tenerife.pdf>

Concrete measures for the implementation phase might include:

- The implementation of city platforms, as integrated tourism management and planning systems for the destination.
- The application of Business Intelligence technologies, Analytics, Big Data and tourism intelligence systems for a better relationship with tourists.
- The implementation of mobile tourism applications.
- The deployment of sensors, beacons, totems and other elements on beaches and points of tourist interest in cities.
- The implementation of smart management systems for public lighting, irrigation, mobility, transport, waste and energy efficiency, among others.
- The digitalisation of tourist offices.
- The implementation of Wi-Fi access points, as well as IT and communications infrastructure.

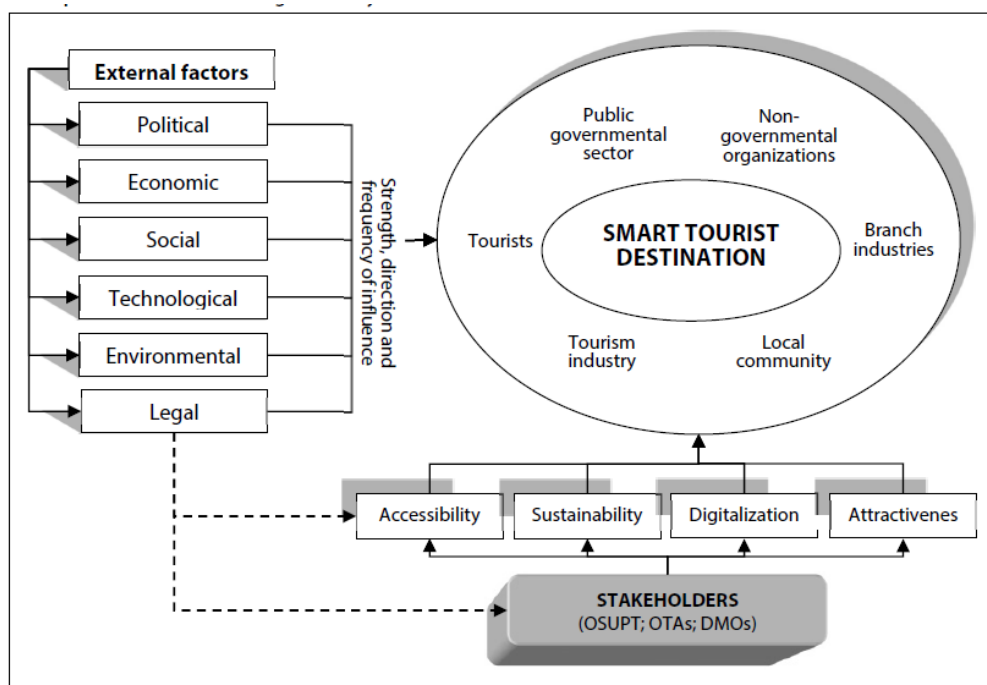
- The generation of relevant tourism content, including interactive, virtual reality and augmented reality projects.

The concrete measures are supported in Spain in the 2014-2020 period with ERDF support for eligible municipalities. Within Spain, AENOR, the national agency for regulation and technical norms developed, in line with their work on Smart Cities, the norm UNE 178501 Standard Management systems for smart destinations. This standard which is complemented by UNE 178502 Indicators and tools for smart destinations, which provides ways to assess compliance with the requirements of the UNE 178501 Standard, compare destinations with each other, and monitor the evolution of the STD over time.

Concrete examples of STD have already been implemented in 47 destinations, of which three outside of Spain (Cozumel and Tequila in Mexico, and Medellin in Colombia)²⁸. For instance, the city of Alcobendas (Spain) has prepared a Diagnostic Report and Action Plan for the transformation of the city into a Smart Tourism Destination in 2019-2020. Alcobendas already had a powerful R&I ecosystem, boosted by its location close to the capital city of Madrid and to multinational company headquarters, and implemented policy aimed at enhancing public-private cooperation, for instance through the implementation of Alcobendas HUB in 2017. The STD approach adopted allowed the city to consolidate the destination, with a significant endowment of technological infrastructures and the implementation of the Alcobendas Smart City Master Plan²⁹.

An interesting example of how the concept inspires also other European tourism destinations is the case of Varna in Bulgaria. After being proclaimed as European Youth Capital in 2017, Varna continues its path of development as a centre of attraction for business and young people.

Figure 4 From smart city to smart tourism destination



Legend: OSUPT (Organizational Structures of Urban Public Transport); OTAs (Online Travel Agencies); DMOs (Destination Management Organizations).
Source: The authors.

Source: K. Kostadinova Popova & M. Malinova Malcheva (2020): Assessment of the potential of Varna city as a Smart Tourism Destination, *TOURISM*, vol.68/No.3/2020/pp. 308-321

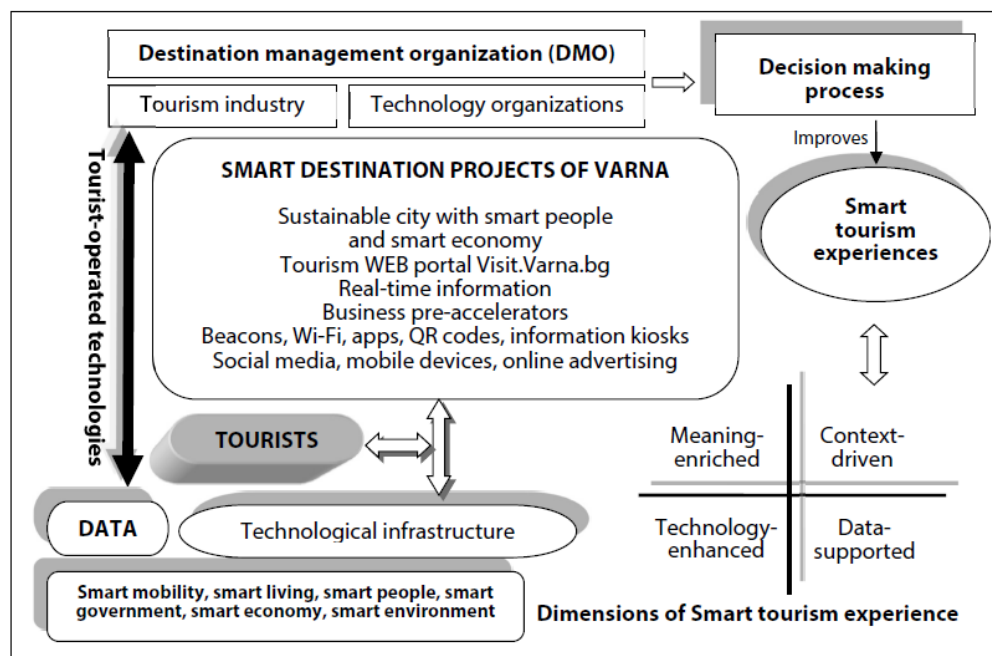
²⁸ <https://www.destinosinteligentes.es/destinos-inteligentes/> (consulted on 01.06.2021)

²⁹ <https://www.destinosinteligentes.es/destinos/alcobendas-comunidad-de-madrid/> (consulted on 01.06.2021)

Tourism is a key sector for the city and the biggest part of the demand is arranged in its context. Therefore, there is an increasing need of managing the tourist growth continuously expanding the product portfolio and complying with the needs of the sustainable development. In their scientific article³⁰, the authors present a conceptual model, to develop Varna as a STD. The main idea is to enable people and all types of organizations to improve the city's environment by developing projects in different spheres, such as entrepreneurship, urban environment, culture, new technologies, etc., with digitalization and "city intelligence" being integral parts of the process.

The authors highlight that *"the development of the city as a smart destination depends on the attitude of the public sector and the will of the state institutions to co-operate with other organizations, including those from the tourism industry and those from the branch industries. A core moment in the work of Varna Municipality is encouraging the leadership, entrepreneurship and investment process for the purposes of modernization of the material and technical city infrastructure and elaboration of specialized production factors, such as technologies."*

Figure 5 Proposal of a smart tourism destination profile for Varna



Source: K. Kostadinova Popova & M. Malinova Malcheva (2020): Assessment of the potential of Varna city as a Smart Tourism Destination, TOURISM, vol.68/No.3/2020/pp. 308-321

In fact, Varna is already on the road to its inclusion in the group of cities identified as potential smart destinations. According to the authors' selection, significant projects developed in the last few years paved the way to become a STD:

- **URBACT "Interactive Cities"**³¹: promoting the city as an attractive tourist destination by attracting more tourists with the help of social networks and improving its image at national and international level and involving a wider circle of citizens in the decision-making process, as well as easier research on public opinion through social channels.
- **Horizon 2020 "MySMARTLife"**³²: combining ICT, e-mobility and energy solutions to create sustainable urban space and creating and launching a network

³⁰ . Kostadinova Popova & M. Malinova Malcheva (2020): Assessment of the potential of Varna city as a Smart Tourism Destination, TOURISM, vol.68/No.3/2020/pp. 308-321

³¹ https://urbact.eu/sites/default/files/interactive_cities_baseline.pdf (consulted on 03.06.2021)

³² <https://mysmartlife.eu/network/> (consulted on 03.06.2021)

of MySMARTLife cities, composed of a number of cities interested in sharing experiences with other urban areas.

- **Interreg IV-B Southeast Europe "SEE MMS"**: ensuring mobility for all social groups, creating a positive attitude towards sustainable means of transport, reducing environmental impacts associated with traffic and improving the quality of life.
- **Museums of Varna** – repair and modernisation - improving the conditions for providing services in some cultural institutions in Varna, including museums, galleries and monasteries.
- **Smart Cyber** - developing a model which includes network software for database and a system for feedback from critical infrastructure sites.

Recently, the Mayor of Varna signed also a Memorandum of cooperation with universities and the industry for promoting Varna as a 'City of Knowledge'.

As can be seen in the proposal model of the STD Varna, the interaction between the destination and the tourists, generating useful information for both sides, is in the centre.

4.4.3 Larger Context

The STD methodology is already well structured and developed at national and international scale. SEGITTUR is pursuing the consolidation process of this approach. With the aim of creating a homogeneous framework for the STD methodology, the Secretary of State for Tourism promotes, through SEGITTUR, has produced four³³ public standards to support the STD model allowing interested destinations to deepen the standardisation of the approach:

- Management System of a Smart Tourism Destination³⁴
- Smart Tourism Destination Indicators and tools³⁵
- Semantic applied to smart destinations³⁶
- The smart and connected digital Hotel³⁷

Moreover, the STD concept has been promoted beyond Spanish borders with the support of international organisations such as the Organisation for Economic Cooperation and Development (OECD), the International Development Bank (IDB), the World Travel & Tourism Council (WTTC) and the World Tourism Organisation (UNWTO). The latter dedicated its 8th Global Summit on urban tourism to 'Smart Cities, Smart Destinations'³⁸. SEGITTUR has been involved in the summit organisation, animating the Panel discussion on smart destination³⁹ focused on the five pillars of the Smart Destinations (innovation, technology, accessibility, governance, and sustainability), with the aim to discuss how cities can become smart tourism destinations.

It should be noted that the STD concept has also been considered at EU level, providing technical contribution, for instance through the workshop 'From Digital Innovation to Smart Tourism Destination; stakeholders' reflections in times of Pandemic' held in January 2021⁴⁰, as well as through concrete actions, such as through the publication of

³³<https://www.segittur.es/destinos-turisticos-inteligentes/proyectos-destinos/normalizacion-destinos-inteligentes/> (Consulted on June 1st, 2021)

³⁴<https://www.une.org/encuentra-tu-norma/busca-tu-norma/norma?c=N0060239> (Consulted on June 3rd, 2021)

³⁵<https://www.une.org/encuentra-tu-norma/busca-tu-norma/norma/?c=N0060240> (Consulted on June 3rd, 2021)

³⁶<https://www.une.org/encuentra-tu-norma/busca-tu-norma/norma?c=N0062376> (Consulted on June 3rd, 2021)

³⁷<https://www.une.org/encuentra-tu-norma/busca-tu-norma/norma?c=N0062377> (Consulted on June 3rd, 2021)

³⁸<https://www.unwto.org/8-unwto-global-summit-on-urban-tourism-smart-cities-smart-destinations> (Consulted on June 1st, 2021)

³⁹https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2020_01/final_programme_globalsummit_urbantourism.pdf (Consulted on June 1st, 2021)

⁴⁰<https://ec.europa.eu/jrc/sites/jrcsh/files/jrc123390.pdf> (Consulted on June 1st, 2021)

a tender aiming to foster smart tourism solutions for EU destinations with the European Capital of Smart Tourism⁴¹.

Besides the STD concept, one of the most recent international initiatives to recognise the achievements of tourism cities in the sphere of smart tourism is the recently launched (July 2019) European Union's **European Capital of Smart Tourism initiative**⁴². Contrary to the widely used smart cities wheel framework, this award programme identifies four areas of excellence specific to smart tourism destinations: accessibility, digitalisation, sustainability, cultural heritage and creativity. This initiative is managed by the European Commission's DG GROW. It is supported by the COSME programme and results from a preparatory action proposed by the European Parliament. The European Capital of Smart Tourism recognizes outstanding achievements in smart tourism in European cities. Smart tourism responds to new challenges and demands in a fast-changing sector, including the evolution of digital tools, products and services; equal opportunity and access for all visitors; sustainable development of the local area; and support to creative industries, local talent and heritage.

4.4.4 Lessons learned

The experience of the application of the STD methodology in Spain as well as other projects to promote the concept of smart tourism destination have identified the need of a joint and coordinated action of the private and public sector as a key aspect for the development of smart tourism destinations.⁴³ The involvement and active participation of actors from the public sector, and in particular local institutions with local competencies in tourism, combined with tourism companies from the private sector is considered crucial.

In the case of Varna, a number of key elements have been identified to be taken into account when building a smart tourism destination. The analysis carried out in the framework of the 'Assessment of the potential of Varna city as a smart tourist destination'⁴⁴ allowed to draw the following lessons:

- The more educated and technologically advanced are the consumers, the greater is the need for specialisation by the supply sector.
- Special attention should be paid to the principle of sustainability through the application of innovative technology measures.
- The influence of political and legislative factors as objective conditions for the development of the tourism sector in general should not be overlooked. The political will to apply ICT in all spheres of socio-economic life is at the basis of building smart cities and smart tourism destinations.
- Beyond novelty and the pull of new technologies, users tend to be motivated by economic, environmental and social factors. In this context, the success of the STD initiatives can receive an important push by the new information and registration measures linked to the COVID-19 pandemic and the EU digital vaccination pass.

In terms of weaknesses hampering the successful transformation in STDs, the following have been identified in Varna:

- Managerial issues in implementing smart technology in all spheres of the supply process;
- Lagging development of the technical infrastructure;

⁴¹ <https://etendering.ted.europa.eu/cft/cft-display.html?cftId=6395> (Consulted on June 1st, 2021)

⁴² https://smart-tourism-capital.ec.europa.eu/european-capitals-smart-tourism_en (consulted on 30.06.2021)

⁴³ Monnet, N., et al. (2013): Miradas cruzadas: observaciones, entendimientos y representaciones en torno a las dinámicas urbanas contemporáneas, Biblio3W. Revista Bibliográfica de Geografía y Ciencias Sociales, 18(1045).

⁴⁴ K. Kostadinova Popova & M. Malinova Malcheva (2020): Assessment of the potential of Varna city as a Smart Tourism Destination, TOURISM, vol.68/No.3/2020/pp. 308-321

- Problems in the application of smart technologies in mass urban transport systems;
- Unsatisfactory qualitative and quantitative parameters of regional tourism advertising;
- Weak online visibility of the destination;
- Insufficient foreign direct investments;
- Irrational use of the available natural and anthropogenic resources;
- Insufficient visibility and public awareness of the completed smart projects achievements.

4.4.5 Conclusion

The STD methodology has already proven to be transferable, considering its international implementation (Spain, Mexico, Colombia, EU Capital for Smart Tourism), and the relevance of this concept at a global scale, given the dissemination e.g. through the 8th Global Summit of the UNWTO dedicated to the theme.

This concept has inspired, to a certain extent, the shift towards the STD approach in other tourist destinations in Europe. For instance, a similar project was developed for the destination Varna in Bulgaria which developed a series of projects with activities and objectives pointing to the development of a smart tourism destination. Researchers from the University of Varna elaborated an in-depth assessment of the city's potential for further development and transformation in this direction. This exercise can be an interesting inspiration for other cities and tourism destinations in Europe.

Looking at ESIF Policy Objectives (PO) of the next programming period, tourism could be financed through PO 4 'A more social Europe' and SO 4.v 'Enhancing the role of culture and sustainable tourism in economic development, social inclusion and social innovation', as well as under both Specific Objectives of the PO 5 "A Europe closer to citizens by fostering the sustainable and integrated development of all types of territories". At the same time, the wide range of activities needed to develop a smart tourism destination entail the need for local authorities and key stakeholders to coordinate different types of actions beyond those closely linked to tourism, e.g. by ensuring the appropriate investments, for example, in terms of smart specialisation governance, ICT and sustainable mobility (under PO 1 or PO 3).

4.5 Climate-friendly vacations in the Eifel

This case study report describes the approach of a region to become a climate-friendly destination with the intention to produce less carbon emissions through tourism activity.

4.5.1 General information

Tourism in the Eifel (Germany) is very popular: whether adventurous mountain biking or pure relaxation while hiking through the nature park. The Eifel is a typical example of the tourism type that our report has denominated as "Spritz" tourism, that is rural inland tourism region in Europe. The Eifel is a low mountain range in western Germany and eastern Belgium. It fills parts of southwestern North Rhine-Westphalia, north-western Rhineland-Palatinate and the southern area of the German-speaking Community of Belgium. The Eifel covers an area of 5,300 km². Part of the North Eifel has been designated as the Eifel National Park. There are also four nature parks in the Eifel. In the east and south it is bounded by the valleys of the Rhine and the Moselle. A feature of the Eifel are its natural lakes of volcanic origin. In 2019, the Eifel in Rhineland-Palatinate received approx. 1 million visitors who spent 3.6 million nights in the region. This is roughly 1% increase compared to the previous year. Only 27% of visitors (29% of overnight stays) come from other countries (mostly neighbouring countries), while 73% are domestic visitors. Roughly, it can be estimated that more than 6 million same-day visitors can be added to the afore-mentioned overnight visitors. (dwif e.V. & Consulting, 2016; Ellermeyer, 2018; Statistisches Landesamt Rheinland-Pfalz, 2020).

However, as the number of guests increases, so does the burden on the environment and climate. To counteract this, the **Nordeifel Nature Park** launched an initiative to raise the awareness of tourists and regional actors for climate-friendly vacation and leisure activities: the "KlimaTour Eifel - Network Climate Protection and Tourism" initiative, which was implemented between 2012 and 2015. The initiative supported the implementation of climate-friendly measures and made it easier to change behaviour, for example by certifying climate-friendly hosts and providing free public transport tickets for overnight guests. Playful sensitization for the ecological footprint of one's own leisure activities also contributes to the success of the project: At www.klimatour-eifel.de, with the help of an online tool, the CO2 emissions of the planned trip can be easily calculated and reduced with practical savings tips. The network and the agreements to facilitate climate-friendly tourism still are active today.

The destination management organisation "Naturpark Nordeifel e.V."⁴⁵ was the promoter of the initiative. Support came from the EU-ERDF within the Regional OP, the Regional Ministry of Economy, Energy, Industry, Small and Medium-Sized Enterprises and Crafts (MWEIMH), and the City region Aachen with the districts Düren and Euskirchen.

Project website

The screenshot shows the homepage of KlimaTour Eifel. The header includes the logo and navigation menu. The main banner features a hot air balloon and the text 'KLIMAFREUNDLICHER URLAUB IN DER EIFEL'. Below the banner, there are three buttons: 'GESTALTEN SIE IHREN URLAUB SOWOHL IN DER ANREISE ALS AUCH BEI DER WAHL DES GASTGEBERS KLIMAFREUNDLICH.' and 'Mehr Informationen'. At the bottom, there is a 'CO2 Rechner' section and three article teasers with 'weiterlesen' links.

Source: www.klimatour-eifel.de

4.5.2 Description of the policy initiative

Climate change and climate protection are among the greatest challenges of our time and are also becoming increasingly important in tourism. That is why climate-friendly products and services are also necessary in the tourism industry in order to provide a

⁴⁵ <https://www.naturpark-eifel.de/de/>

positive contribution to climate protection and to meet the increasing demand for sustainable tourism offers.

With the KlimaTour Eifel initiative, the Nordeifel Nature Park, together with its partners, promoted the development of a sustainable and climate-friendly nature tourist destination. The project had a volume of around EUR 280,000 and was co-funded (80%) by the European Union and the Ministry of Economics of the State of North Rhine-Westphalia.

The project started with estimating the CO₂ effect of tourism in general. Compared to holidays in destinations far away, requiring a flight or a long trip by car, a vacation or day trip to the nearby Eifel Nature Park can be an important step towards climate-conscious tourism for many people in the German-Belgian-Dutch region around Aachen and Cologne. The Eifel nature experience region offers a diverse and attractive range of activities for the whole family. But of course, there are also climate-relevant emissions during a trip to the Eifel. The North Eifel Nature Park has calculated the amount of CO₂. A total of around 250,000 tons of CO₂ are caused annually by day and overnight tourism, of which 68% in mobility, 21% in gastronomy and 11% by overnight stays.

The KlimaTour Eifel initiative aimed to reduce the climate-damaging emissions for a stay in the North Eifel and to benefit from sustainability trends in tourism (40% of Germans would like to go on environmentally and resource-saving holidays).

Therefore, four specific objectives were established:

- To raise awareness among regional tourism stakeholders on the carbon footprint of the tourism activity and create opportunities to reduce this footprint.
- To raise awareness among tourists and inform them on the carbon footprint of their activities (transport, food and beverage consumption, accommodation, sports, etc.) and how they can reduce it.
- To create a network of regional actors to offer tourism products (in particular, public transport) with a reduced carbon footprint.
- To promote proximity tourism in the Eifel to the people living in the surrounding cities and districts, compared to other, more distant destinations that would cause a much higher carbon footprint.

Different complementary measures were planned to achieve these objectives. One of the key measures is the project website, the **climate protection portal**, where all information about a climate-friendly stay in the Eifel is bundled. With a **CO₂ calculator**, guests can independently calculate their CO₂ footprint for their holiday in the Eifel and, if desired, even compensate for it via Co2ol compensation measures⁴⁶. For the CO₂-calculator, abundant information was gathered on general (average) carbon footprints of different transport and accommodation forms. In addition, specific information is available on certified accommodation and food/beverage businesses in the Eifel region.

Moreover, the project was built on a series of additional activities:

1. Individual work with regional accommodation and gastronomy businesses on calculating their carbon footprint and on their certification as climate-friendly businesses by Viabono GmbH, as well as the associated presentation of the CO₂ balance of the respective business on the website. This was linked to the identification and dissemination of climate-friendly good practices in gastronomy and accommodation services.

⁴⁶ <https://www.co2ol.de/en/>

2. Free public transport ticket for Eifel visitors: Creation of a network with regional Public Transport companies to create opportunities for carbon-reduced travel to/from and within the region (soft mobility schemes and integrated ticketing with the so called 'Gäseticket' or 'GästeCard'). The Nordeifel Nature Park developed the "guest ticket" together with the tourist organizations and the transport associations Aachen (AVV) and RheinSieg (VRS). Since 01/01/2014, overnight guests from participating accommodations have been able to use buses and trains free of charge for arrival, departure and journeys in the North Eifel but also for a visit to Aachen, Cologne or Bonn.

3. Regional products: Promote the use of seasonal and regional food in gastronomy and accommodation businesses in the region. This plays a particularly prominent role, as products from the regional EIFEL brand⁴⁷ have short transport routes and contribute not only to reduce transport-related CO₂ emissions, but also support the regional value chains and the preservation of the Eifel natural products and cultural landscape.

The CO₂ Calculator and a CO₂ certification example for a regional hotel

CO₂-Rechner

Bedienung des CO₂ Rechners

Der CO₂-Rechner ermöglicht es Ihnen, die Klimawirkung Ihrer An- und Abreise und Ihres Aufenthaltes in der Eifel selbst zu bestimmen. Wählen Sie einfach das Verkehrsmittel aus, geben anschließend den Start- und Zielort ein und falls Sie übernachten dann wählen Sie die Betriebsart aus – die entstehenden CO₂-Emissionen werden automatisch ermittelt und angezeigt. So können Sie auch unterschiedliche Verkehrsmittel miteinander vergleichen oder durch die Kompensation entstehender CO₂-Emissionen Ihre Anreise auf Wunsch klimaneutral gestalten.

CO₂-Rechner für Ihre An- und Abreise

PKW/Motorrad ÖPV Flugzeug Hotel **CO₂-Emissionen**

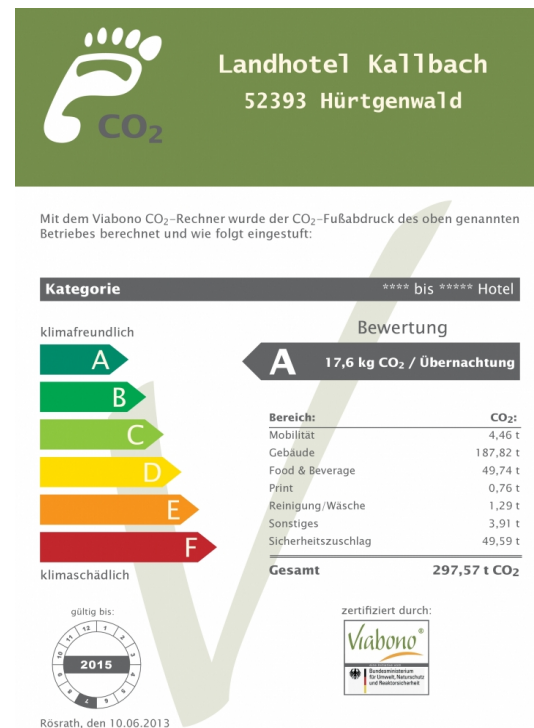
Fahrt mit dem Auto 0,00 g

Startort über Zielort Strecke Kraftstoff Benzin Kraftstoff-Verbrauch 10 U/100 km Fahrt Hinfahrt

Fahrt mit dem Motorrad 0,00 g

0,00 g + 0,00 g + 0,00 g + 0,00 g = 0,00 g

Umwelt-Tipp Erläuterungen und Erfahrungswerte powered by COOL



Source: <http://www.klimatour-eifel.de/co2-rechner/>

4. Climate-friendly vacation packages: In order to meet the demand for climate-friendly and sustainable vacation offers, the tourist working groups developed climate-friendly vacation packages in connection with outstanding nature experiences. This makes it easier for the tourist to select climate-friendly businesses and activities.

5. Renewable Energy Tour Eifel: Even today, up to 50 percent of the Eifel's electricity needs are generated in the region itself. Regardless of this, solar systems, wind turbines, hydropower plants and bioenergy systems are also interesting technical achievements. The North Eifel Nature Park has summarized the most prominent visitor locations in the "EnergieTour Eifel" leaflet. Interested parties can find all information about the location, technology and contact details of the renewable energy systems here.

6. At various events, regional tourism stakeholders were informed about the issue of climate protection in tourism and about trends and best practice examples. Together

⁴⁷ www.regionalmarke-eifel.de

with Eifel Tourismus GmbH, the Nordeifel Nature Park offered tourist service providers the opportunity to train themselves in seminars of the German Seminar for Tourism (DSFT) on the topics of corporate social responsibility (CSR) and the design of climate-friendly offers in tourism.

The project was very successful in achieving its results in these six areas. After several years, positive impact can be observed. Recently, every year – not taking account the atypical COVID-19 year 2020 – around 15,000 GästeCards are handed out to guests who stay in participating establishments or use the arrangements of the tourism organisations⁴⁸. The offer is extremely important in relation to promote as a sustainable tourism region. The 'GästeCard' was awarded the 'Destination Natur Award'⁴⁹ in autumn 2018. This Award recognises the commitment to linking sustainable tourism and environmentally friendly mobility in Destination Nature areas. It is a cooperation of the three large German environmental organisations Bund für Umwelt und Naturschutz Deutschland (BUND), Naturschutzbund Deutschland (NABU) and Verkehrsclub Deutschland (VCD) as well as Deutsche Bahn (German Railways).

It was beneficial for the uptake and use of the 'GästeCard' that in recent years also 19 DB railway stations and stops were turned into Northern Eifel cycling and hiking stations. As a permanent mobility offer, the Eifelsteig hiking bus is on the road on weekends, public holidays and bridge days in the North Eifel. This offers additional comfort to hikers on the Eifelsteig and its partner trails. Since 2019, in addition to the Eifelsteig hiking bus, the Eifel hiking & cycling bus has been in operation in the North Eifel in the form of a regular bus with trailer with space for 16 bicycles / pedelecs. From 2021, a cycling and hiking bus will be on the road in the Upper Ahr Valley for the first time. Other tourist routes have been set up with the CityBus Bad Münstereifel and the TaxiBusPlus from Mechernich station to the LVR Open-Air Museum in Kommern. In the area of e-mobility, a new tourist mobility concept is being implemented in cooperation with the district of Euskirchen. Owners of e-mobiles and pedelecs will find charging facilities at numerous locations in the North Eifel⁵⁰.

4.5.3 Larger Context

The project was co-funded within the Regional ERDF Operational Programme for Nordrhein-Westfalen 2007-2013.

The project links to the overall work of the local destination management organisation (DMO), the Nordeifel Tourismus GmbH. The project helped to start the work on the multi-layered, multi-faceted and complex aspect of sustainability, searching for a contribution to the sustainable development of the region. The project helped to firmly anchor the principles of sustainability in the strategy of the tourism region, namely in the Tourism and Marketing Concept 2020-2025 of the Northern Eifel region. The core of the concept is the topic of sustainability, which is today understood as cross-cutting theme in the five fields of action: Infrastructure, Products and services, Communication and distribution, Organisation, management and financing, Guest services. The DMO is supported in the implementation of the concept by a sustainability advisory board.

Since May 2020, the DMO Nordeifel Tourismus GmbH has been a member of the German Federal Excellence Initiative "Sustainable Destinations"⁵¹. The Excellence Initiative Sustainable Destinations is designed to enable destinations in Germany to network and exchange ideas in order to jointly overcome challenges, share best practices and lessons learned, as well as to drive joint projects that aim to push and spread the implementation of sustainability in German tourism. Through the network, the region is

⁴⁸ Information from interviews with stakeholders.

⁴⁹ <https://www.fahrtziel-natur.de/natur/view/wir/fzn-award.shtml>

⁵⁰ <https://nordeifel-tourismus.de/wissenswertes/nachhaltigkeit/wie-wir-an-morgen-denken>

⁵¹ <https://www.tourcert.org/projects/exzellenzinitiative/>

given the opportunity to contribute and further develop sustainable and climate-friendly tourism.

The project also connects to the regional climate policy objectives. In 2018, the project was included as good practice into the selection of climate-friendly projects of the regional Climate Exposition KlimaExpoNRW⁵², to promote climate-friendly economy, life and work. For the KlimaExpo.NRW, the KlimaTour Eifel project is a prime example of other tourism concepts. The project shows that holidays can also be designed in a climate-friendly way and thus has an effect that goes far beyond the Eifel region. By 2022, the state initiative will present 1,000 projects that illustrate particularly well the progress engine of climate protection in North Rhine-Westphalia. As the 33rd step of the KlimaExpo.NRW, the KlimaTour Eifel project is now officially a pioneer for climate-friendly tourism in North Rhine-Westphalia.

4.5.4 Lessons learned

According to the local stakeholders, for this project it was relevant to have a good cooperation and network in the region. Sustainability can only be achieved when engaging and addressing the complete tourism ecosystem, from transport to accommodation, restaurants, activities and destination management. One of the success factors was the interest and positive response from regional businesses and transport associations. Other tourism stakeholders such as excursion destinations also participate in the card with discounts. The VRS (Rhein-Sieg) and AVV (Aachen city region) local transport associations are important project participants without whose cooperation the Card would not have come into being. The transport associations are also involved today as important contractual partners.

To achieve sustainability, it was necessary to start with pilot actions, but develop sustainable long-term solutions, for example through engaging external partners and ensure long-term funding of actions. To include the activities in strategies and tourism marketing concepts was also very useful. It is necessary to build up critical mass of public and private partners. This might take several years. Visibility and support through national and regional initiatives and networks can help destinations and partners to learn and show their results.

4.5.5 Conclusion

Overall, the project allowed for the first time for a nature park tourist region in Germany to calculate the so-called "CO₂ footprint" and make it available as a data basis. In the medium term it is expected to avoid 10% of tourism CO₂ emissions by means of the information and measures that have been made available. There had been a desire for a free and integrated public transport card in the region for years. For the concrete implementation, the project was just right to convince the transport associations and the transport companies in particular. Another important result was the awarding of climate-friendly hosts. In addition, the project raised awareness on a large scale. All in all, the impact of the project can be summarised as very stimulating.

According to the regional stakeholders, the project has given the topic of sustainable tourism a decisive boost, in particular to the relevance of free and integrated public transport for visitors in combination with suitable and tailored local public transport offers for tourists.

The project shows how a tourism destination can commit to become a climate-friendly and sustainable destination. This experience can be transferred to other destinations, in particular, to other natural and rural tourism destinations with similar characteristics like the Eifel. As the case of Eifel shows, there are many ways to scale the commitment of a destination to become sustainable and climate-friendly, when sustainability

⁵² <https://www.energieagentur.nrw/klimaexpo/>

becomes the key development principle of a tourism destination (instead of quantitative growth).

4.6 EuroVelo as lever to enhance Alsace as cycling destination

This case study shows how the development of a specific tourism product is possible with the participation of many different players within a region and beyond. Partnership, governance and cross-border/transnational cooperation in four key areas (infrastructure, services, communication and promotion, and monitoring and evaluation) is key to develop sustainable tourism in many European regions and increase its benefit for the region.

4.6.1 General information

The region of Alsace is situated in the east of France and is part of the region Grand Est. The region is defined by natural borders with the low range mountains on the Voges in the west separating it from the rest of Grand Est and the river Rhine in the east separating it from Germany. In the south the region borders to Switzerland.

Alsace's situation in France, close to Luxembourg, Germany and Switzerland



Source: <https://www.france-voyage.com/travel-guide/alsace-territoire.htm>

Alsace is a destination full of attractions for fans of cultural sightseeing and authentic charm. While the region is particularly renowned for its gastronomy with flammekueches, sauerkrauts, baeckeoffes, white wines and magical Christmas markets, it is also known for its delightful floral villages with half-timbered buildings, medieval castles and prestigious museums. The region is home to historic cities, such as Strasbourg and Colmar, and has a rich cultural heritage. The region has thus much to offer to tourists. The destination also offers a diverse natural landscape include river valleys, rolling hills and mountains. This makes it ideal for day-tourists, weekend stays and active hiking and cycling tourists.

The region is a typical representation of the tourism type "Spritz" in our study.

Even if the number of tourists is high, the regional and local tourism destination management organisations work hard to increase the benefit from tourists and to increase the attractiveness of the region for longer stays or repetition of visits.

In this context, the Alsace tourism destination management organisation (ADT) actively promotes cycling tourism in its region. In 2019, about 2 million cyclists used the region's 2,500 km of cycling routes⁵³. This implies a substantial increase of the cycling routes in recent years. In 2017, the region had about 1,500 km of cycling routes⁵⁴.

"Alsace à vélo" (Alsace by bike) is a key driver promoting the region's cycling tourism, since 2012. Alsace à vélo is a partnership of different public and semi-public players. The partnership coordinates the development of cycling infrastructures, services, communication, promotion, monitoring and evaluation with the aim to making the region a first-class cycling destination.

The website of Alsace à vélo functions as one-stop shop for cycling tourists in the Alsace region. The website offers more than 100 cycling routes, including routes that cross France's borders to Germany and Switzerland, and the cross-European cycling routes, "EuroVelo", that cross the region. In addition, the website provides information on accommodation, restauration, activities and services. Alsace à vélo provides tourist thus a complete offer around cycling.

4.6.2 Context and background

Alsace à vélo was established in 2012 following the region's 2012-2016 strategy for tourism development. This document proposed to make the region a top cycling destination in Europe.

The strategy and initiators proposed to use the EuroVelo routes crossing the region as starting point for developing a coherent cycling network (see also the box). These long-distance cycling routes are seen as a main opportunity to develop the destination.

EuroVelo routes provide visibility to the region as cycling destination. Moreover, they provide a physical link with some of Alsace's main tourism markets, namely Germany, Switzerland and the Netherlands. Tourists from these markets already perceived the Alsace as cycling destination prior to the initiative Alsace à vélo. So, the initiative uses this imagine and the physical links to enhance its profile as cycling destination.

The strategic choice to focus on EuroVelo routes as starting point for the development of the region as cycling destination was affirmed in a study from 2013. The study issued by the Alsace tourism destination management organisation found out that long-distance cyclists are of particular importance for the wider tourist sector. Although these types of tourists only represent about 10% of the cycling tourists in the Alsace, they provide for about 50% of the economic benefits from cycling tourism. Long distance cycling tourists make more use of accommodations, restaurants, and other services than day tourists. Hence, their greater contribution to the tourist sector. The partnership of Alsace à vélo took these study results to strengthen their focus on cycling tourists. Following the study's recommendations Alsace à vélo focuses on four key axes, namely infrastructure, services, communication and promotion, and evaluation.

The current Alsatian strategy for destination management 2017-2021 still focuses on cycling tourism. It recognises the extensive network of cycling routes to promote and to use it to ensure better spread of visitor flows on the region's territory. Other regional strategies, including the regional innovation strategy refer to tourism as important sector for the region but they do not refer to cycling tourism explicitly.

EuroVelo Network

⁵³ Alsace à vélo. Dossier de presse 2019 : <https://www.alsaceavelo.fr/presse/dossier-presse-alsace-a-velo-2019.pdf>

⁵⁴ Alsace à vélo. Dossier de presse 2017 : <https://www.alsaceavelo.fr/presse/dossier-presse-alsace-a-velo-2017.pdf>

EuroVelo is a network of 17 long distance cycling routes across Europe. The network consists of existing and planned cycle routes in all EU countries and was initiated in 1993 and officially launched in 1997. The first EuroVelo route was "opened" in 2001. Currently, 45,000 of 90,000 km of cycling routes are developed and signposted⁵⁵.

National, regional and local public authorities as well as private service providers and NGOs develop and maintain the network. The European Cycling Federation manages, coordinates and promotes the network.

Three EuroVelo (EV) routes cross the Alsace region:

- EV5, Via Romea, connects Canterbury (England) with Brindisi (Italy). The route crosses the Alsace region from the Northern Voges by Saverne until Saint Louis on the Swiss border.
- EV6, Atlantic-Black Sea, connects the Loire delta at Saint Nazaire (France) with the Danube river delta at Constanta (Romania). The route crosses the southern part of the Alsace.
- EV15, Rhine Cycle Route, follows the Rhine river from Switzerland until the Netherlands. The route crosses the Alsace from South to North along the Rhine. EV15 is the first certified EuroVelo route, meaning among others that 100% of the route has been developed, that it is largely accessible to all kind of cyclists (from families until experiences cyclist), and has clear signposting.



Source: eurovelo.com

4.6.3 Description of the policy initiative

The partnership of Alsace à vélo consists of representatives of

- two tourism agencies - the Alsace tourism destination management organisation (ADT) and the regional tourism agency for Grand Est

⁵⁵ <https://en.eurovelo.com/>

- five urban areas, the Eurometropolis Strasbourg, agglomeration Colmar, agglomeration Mullhouse and recently the cities of Haguenau and Saint Louis joint
- two regions - the region Grand-Est, and the Alsace region (formerly the departments of Haut-Rhin and Bas-Rhin)
- the French state represented by the prefect of Grand Est.

Representatives of these partners meet regularly in different settings. About three times per year meetings among technical staff takes place. Another three meetings per year include rather policy makers. Once every two years a large conference is organised with wider participation, including politicians, tourism operators and cycling organisations.

Each partner performs and implements activities following its competences in four interrelated domains:

- Activities in the area of **infrastructure** focus on developing routes and clear signposting. For example, between 1990 and 2017 the department of Bas-Rhin invested almost 52 million Euro in the development of cycling routes. Similarly, between 2003 and 2015 the department of the Upper Rhine invested more than 40 million in cycling routes⁵⁶.
- Activities in the area of **services** focus on accommodation and restauration, holiday offers along the routes, bike maintenance and interoperability with public transport.
- Activities in the area of **communication and promotion** focus among others on marketing, publications, events and website maintenance. The website of Alsace à vélo functions as a one-stop-shop and contains all relevant information for cycling tourists.
- ADT, in close cooperation with the tourism observatory of the region Grand Est, is regularly **monitoring and evaluating** the outcomes of activities. They issue for example studies to count the number cyclist on different routes or perform surveys among tourists.

ADT coordinates the partnership, these meetings, and is responsible for the management of the Alsace à vélo website. Moreover, ADT ensures relations between activities in each of the different domains, among others via the regular meetings.

In addition, partners of Alsace à vélo engage in projects to improve the region's offer for cycling tourists. A large number of these projects have an international dimension. Participation in these projects is important to benchmark and compare activities between regions and coordinate them.

Examples of transnational and cross-border cooperation projects

Between 2009 and 2014 ADT as well as the two former departments of the Alsace region participated in the Demarrage-project, funded via the INTERREG IV B North West Europe programme⁵⁷. The project focused on developing Eurovelo route 15. The project led among others to signing a long-term agreement between key partners along this Eurovelo route. Following this agreement, ADT meets partners along the route about three times per year.

The development of EuroVelo route 5 received funding from the EU programme for competitiveness of small and medium sized enterprises (COSME). Representatives from Bas-Rhin participated in this project between 2016 and 2017 enhancing cultural and heritage tourism products along the route.⁵⁸

⁵⁶ Alsace à vélo. Dossier de presse 2017 : <https://www.alsaceavelo.fr/presse/dossier-presse-alsace-a-velo-2017.pdf>

⁵⁷ https://pro.eurovelo.com/projects/2019-09-10_demarrage-eurovelo-15-rhine-route
<https://keep.eu/projects/7035/Developing-the-economic-pote-EN/>

⁵⁸ https://pro.eurovelo.com/projects/2020-03-03_eurovelo-5---via-romea-francigena-

The cross-border Interreg programme Upper-Rhine 2014-2020 has funded a variety of projects contributing to the development of cycling tourism in the Alsace. Projects focus on developing routes, including signposting; upgrading infrastructure, for example crossings of the Rhine by ferry; or the publication of promotion material including maps. Local authorities as well as cross-border entities such as the Eurometropole Strasbourg or EGTC PAMINA ensure coordination between these projects and the objectives of Alsace à vélo.

As a result of these cooperation projects, the website of Alsace à vélo offers more than 13 cross-border routes a number which is still increasing each year.

Today, the active partnership and numerous activities it's four key axes allows Alsace à vélo to offer a wide network of well signposted cycling routes, linkages between routes and indication of attractions, restaurants and accommodations along these routes. This facilitates the needs of long-distance cyclists but is also of benefits of day tourists and local residents. Although the first group may be least numerous, they are most important for the region. Survey results from a study conducted in 2013 already showed that long-distance cyclists generate about 105 Euro per person per day⁵⁹. Hence, the focus on developing a wide network linked to the EuroVelo routes remains of importance for Alsace à vélo.

4.6.4 Lessons learned

The ongoing dialogue among partners of Alsace à vélo is one of the key success factors. The dialogues facilitate coordinated activities in the four axes and thus developing a comprehensive offer for cycling tourists that invited them to stay longer in the region. The focus on long-distance cycling and developing cycling routes from the EuroVelo routes helps to mobilise, engage and keep different partners involved, since these types of tourists are most important for the entire tourism sector.

The COVID-19 crisis has been an important push factor for cycling tourism, especially from people living in France, Switzerland and Germany. The pandemic is an important factor to ensure ongoing development of the region's cycling network. An increase of cycling put the development of cycling infrastructure and routes higher on the agendas of local and regional authorities. In France, EuroVelo routes were used by 20% more cyclists in 2020 compared to 2019⁶⁰. Also in the Alsace region, more persons used their bikes. Due to travel restrictions these concerned mostly domestic tourists, which on average bring less economic benefits for the wider tourism sector than international cycling tourists. Hence, not all tourist operators benefitted from this increase. Ongoing dialogues in the partnership of Alsace à vélo and working on activities in all four axes simultaneously remains thus important to capitalise on this renewed attention for cycling in the future.

4.6.5 Conclusion

The development of Alsace as a cycling destination came about through active destination management, governance and partnerships. In doing so, the EuroVelo routes crossing the region have been an important starting point and still play an important role in the development of cycling tourism in the region today.

The EuroVelo routes offered an important framework and a concrete starting point to develop a comprehensive network with the support of a variety of players. In addition, the development of these routes in European context allowed stakeholders from the Alsace region to see and discuss and learn from approaches to cycling tourism elsewhere. In addition, the EuroVelo routes are used to develop products and services

⁵⁹ <http://www.velo-territoires.org/actualite/2014/08/08/lalsace-a-velo-vitesse-superieure/#>

⁶⁰ Excluding the time of lockdown. https://pro.eurovelo.com/news/2021-05-19_leisure-cycling-grew-last-year-in-germany-the-netherlands-and-france-proving-that-cycle-touring-is-a-safe-and-attractive-option-for-many-europeans

for long-distance cyclists. As such the users of the routes are invited to stay longer in the region and bring more economic benefits to the region's tourism sector (attractions, accommodation, restaurants etc).

Lessons from Alsace à vélo can be applied in other regions in Europe as well. The EuroVelo network crosses regions in all EU Member States and some neighbouring countries. As such other regions can also use the development of this network to capitalise on the increased attention to cycling due to the pandemic.

Regions may use funding from EU recovery plans to develop cycling tourism in their territories. Across the EU about 1.3 billion Euro is allocated to improve cycling experience⁶¹. After all, cycling is an environmental means of transportation and can be done while respecting social distancing rules.

In addition, European territorial cooperation programmes (Interreg) may facilitate the development of this network across national borders. Notably programmes focusing on developing sustainable mobility under policy objectives 2 or 3 as well as programmes focusing on sustainable and integrated development closer to citizens (policy objective 5) may provide means to further develop cycling tourism.

The example of the Alsace region highlights the importance of an ongoing dialogue with a variety of partners when developing cycling tourism. To ensure that the entire tourism sector benefits from cyclist coordinated activities in the fields of infrastructure, services, communication and promotion, as well as monitoring and evaluation are needed.

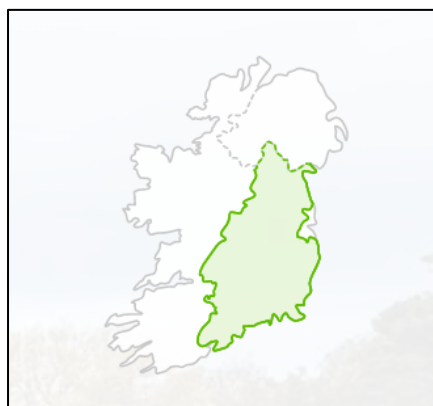
4.7 Storytelling Interpretation Grant Scheme in Ireland

The case presents a business support grant scheme in Ireland that aimed at improving the quality of interpretation, animation and storytelling at existing heritage and visitor attractions. The case shows how a grant scheme can be used to stimulate innovative solutions in promotion, marketing and digital tools in the context of a wider investment strategy.

4.7.1 General information

The Ancient East is one of Ireland's four tourism regions.

Ireland's tourism destination "Ancient East"



Source: <https://www.ireland.com/en-us/destinations/where-to-go/>

⁶¹ <https://www.euractiv.com/section/transport/news/ecf-eu-recovery-plans-squander-chance-to-boost-cycling/>

The Ancient East covers the inland parts of Ireland's South East and Midland regions, namely the counties of Carlow, Cavan, Cork City and East County Cork, Kildare, Kilkenny, Laois, Longford, Louth, Meath, Monaghan, Offaly, Tipperary, Waterford, Westmeath, Wexford, Wicklow.

The area is characterised by green landscapes, history, castles and heritage attractions. Ireland's Ancient East is said to be the land of myths and legends, and the birthplace of Irish culture. Some of Ireland's main attractions can be found in the area, for example Tayto Park, Castletown House Parklands, Kilkenny Castle Parklands and the battle of the Boyne / Oldbridge Estate. Together these attractions received more than 3.5 million visitors in 2019⁶².

To encourage further growth of the Ancient East's tourism sector, the region aims to attract more tourists by offering high quality products and attracting more foreign tourists. Indeed, the region receives fewer international tourists than the other tourism areas in Ireland, notably Ireland's Wild Atlantic Way (coastal regions) and Dublin⁶³. Moreover, tourists going to these destinations use the Ancient East rather for transit than as destination in its own.

Fáilte Ireland is the National Tourism Development Authority. Its role is to support the long-term sustainable growth in the economic, social, cultural and environmental contribution of tourism to Ireland. They work in partnership with Government, State agencies, Local Authorities, representative groups and industry, to develop tourism across Ireland by creating destination development plans and networks, investing in infrastructure, activities, visitor attractions and festivals. Fáilte Ireland also provides mentoring, business supports and training programmes and buyer platforms to help tourism businesses innovate and grow. Tourism Ireland is another organisation responsible for marketing the island of Ireland overseas as a leading holiday destination.

4.7.2 Description of the policy initiative

The **Ancient East's Storytelling and Interpretation Small Grant Scheme** of Fáilte Ireland was proposed within the context of Innovation and Product Development for this destination to strengthen the focus on storytelling and enhance the Ancient's East brand.

Small grant schemes were thought for small scale projects (grants less than EUR 200,000). Ireland's Ancient East Small Grants Scheme, which has a focus on animating heritage places and improving the quality of interpretation, is an example of this type of approach. Each call for grants was preceded by an innovation workshop hosted by Fáilte Ireland to which potential applicants will be invited. These workshops should stimulate ideas and discussion through presentations demonstrating innovation in projects and initiatives that are relevant to the particular grant scheme. Detailed Operational Guidelines were prepared for all grant schemes in advance of their launch.

Ireland's Ancient East Small Grants Scheme on storytelling interpretation was launched in late 2017. It should encourage attractions in the area to provide higher quality tourism products. The grants help attractions to improve visitor experience, notably by providing understandable, meaningful and engaging stories bringing the attractions even more to life. Proposals could be submitted between October 2017 and January 2018. Project proposals could receive grants between 30,000 and 200,000 EUR with a maximum grant rate of 75% of the eligible capital expenditure. Grants were provided to visitor attractions that are at least 5 days per week open to the public, including weekends and for at least 3 months per year. In addition, the site must attract at least 5,000 visitors per year of which 20% from abroad. Eligible costs include the provision

62

https://www.failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/3_Research_Insights/4_Visitor_Insights/KeyTourismFacts_2019.pdf?ext=.pdf

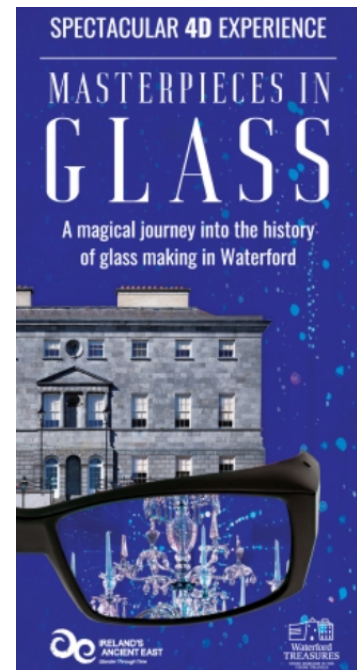
63 The fourth tourism destination is Hidden Heartlands.

of interpretation media such as panels, audio guides and interactive technology including their installation and building costs.

These elements are at the centre of the Ancient East storytelling and interpretation toolkit. The toolkit was developed by Fáilte Ireland following a 2015 grant scheme which delivered too diverse outputs to strengthen the region's brand and make a considerable contribution to the region's tourist products. The toolkit details how storytelling can enhance a visitor's experience and hence contribute to overall objectives for the tourism area.

Improved storytelling is one of the methods to improve tourism products and strengthening the brand. The toolkit presents ways to bring cultural and historical heritage attractions to life via storytelling. As such tourists experience and learn more about the region's history. It furthermore encourages tourists to spend more time at the attractions and in the region. In addition, the grants encourage to offer storytelling in multiple languages, beyond Irish and English the focus is one German and French. German and French tourists are following British, US and Canadian the most numerous visitors in Ireland.

Following the toolkit, grant applicants needed to further specify their storytelling gap. The application shall further detail the main opportunities to tell the attraction's story that engages visitors and improves their experience in an understandable and meaningful way.



17 projects received funding and support via the grant scheme⁶⁴. Potential applicants found more information the grant opportunity on Fáilte Ireland's website. In addition, Fáilte Ireland actively approached some potential beneficiaries to raise awareness about the grant opportunity. This led to a variety of applications of which the large majority received funding in the end.

All projects started in March 2018 and lasted until June 2019. In this period, the projects defined their story, identified ways to best tell the story making it interesting for visitors, contracted experts to technically implement the stories and complete the implementation of the storytelling and interpretation.

The projects improved storytelling by investing in panels, audio guides, or interactive technology, as detailed in the storytelling Toolkit and list of eligible cost. Eligible costs include installation and associated building costs. Tour guide wages and salaries are excluded from the eligible costs. The grants were thus be used to provide additional experience, expenditures that otherwise would not have happened.

12 of the 17 projects introduced digitalisation for their storytelling, according to Fáilte Ireland. Examples include visitor experiences using virtual reality or augmented reality and lively audio guides (see some examples in the boxes below). Other projects improved information provision via panels or specific signposting. Presenting the attraction or cultural heritage site from a unique, personal, perspective was central in each project.

Example Project supported by the Grant Scheme

⁶⁴ The full list of beneficiaries is available on Fáilte Ireland's webpage: <https://www.failteireland.ie/Identify-Available-Funding/Small-Grants-Schemes/Irelands-Ancient-East-Storytelling-Interpretation.aspx>

"Masterpiece in glass"⁶⁵ is one of the 17 projects that received funding via the Ancient East Storytelling and Interpretation grant scheme. The Georgian Bishop's Place⁶⁶ in Waterford offers an exquisite collection of Irish 18th Century furniture, paintings, porcelain, mirrors, silver, and old Waterford glassware. Emagine, a local creative agency developed an immersive experience enhanced by 4D glasses and audio as well as the art of storytelling. Emagine constructed a 270-degree screen space, synched with 3D projectors, and combined the story with lights and physical objects in the room. Through an investment of 200,000 EUR, visitors can now experience the history of glassmaking in Waterford's Bishop Palace via augmented reality. 'Masterpieces in Glass' is now the name of the new guided tour of the Bishop's Palace. The finale of the tour in the Bishop's Palace will feature a seventeen-minute 4D presentation created by Emagine in association with Waterford Treasures. The experience will immerse guests in the culture of eighteenth and nineteenth century Waterford, through the eyes of a young Quaker girl. The new tour provides synergies with nearby attractions such as the Waterford museum and House of Waterford Crystal. In addition, the new experience is made available in French and Mandarin making the attraction more accessible to foreign tourists.

Fáilte Ireland provided the grants in its capacity as the national destination management organisation. Following the 2003 establishment act "National Tourism Development Authority", the organisation's aim is to guide and support sustainable growth in tourism earnings and employment. As such Fáilte Ireland, can issue grants, such as the Storytelling Interpretation Investment Scheme, define its focus, eligible costs and requirements.

Organisations managing or owning attractions or cultural heritage in the region were eligible to apply for the grant, except for Fáilte Ireland's strategic partners⁶⁷. In practice the beneficiaries consisted of private players, voluntary organisations and public organisations.

Attractions received up to 75% of the eligible capital expenditure. Hence, the grant scheme required own resources or co-investors. In the case of the example "Masterpiece in glass", the Waterford City and County council co-invested. In addition, many of the projects engaged different (private) entities for the development of storytelling tools, such as virtual realities or augmented realities, or for translation services.

Besides the grant, Fáilte Ireland also provided guidance and support to the beneficiaries. Fáilte Ireland engaged specific experts on storytelling. The experts were already involved in reviewing project proposals in the first step of applications, providing applicants with particular feedback on storytelling and embedding the story in the attraction's history and linking it to the region's brand. Later on, the experts provided guidance and ideas how to best tell the story and providing an experience for the visitors. In addition, Fáilte Ireland provided guidance on public procurement ensuring that the beneficiaries respected the requirements and they provided guidance on marketing and commerce, making sure that the new tourism product can be easily found by tourists. Partnership agreements between Fáilte Ireland were signed with the grant awarding. Such agreements provided a basis for the intense cooperation between the destination management organisation and the beneficiaries and contributed to mutual understanding on the expected results.

Although, all funded projects were successfully concluded by the end of 2019, no measurable outputs could be collected yet. The COVID pandemic and travel restrictions

⁶⁵ <https://www.waterfordtreasures.com/news/bishops-palace-and-house-of-waterford-crystal-join-forces-for-great-new-tou> and <https://waterfordinyourpocket.com/masterpieces-in-glass-an-exciting-new-installation-at-the-bishops-palace/>

⁶⁶ <https://www.waterfordtreasures.com/bishops-palace>

⁶⁷ Strategic partners support the development of the region's and Ireland's tourism in different ways. Fáilte Ireland's strategic partners are: Coillte, Office of Public Works (OPW), National Parks and Wildlife Service (NPWS) and Waterways Ireland. Although these organisations own and manage some of the region's cultural heritage sites, they were excluded to focus on other sites.

since the beginning of the region's main tourism seasons (spring / summer) did not allow to fully see the results of the improved storytelling in practice. Only limited data could be collected on visitor experience following the feedback of Irish tourists. Domestic tourists are satisfied with the new experiences and see it as an added value of the attractions. Collecting information on increasing number of foreign tourists and extending the time of stays in the Ancient East's regions needs to wait until travel restrictions are lifted and tourists feel comfortable to travel again.

Still, the improvements made to the attractions contribute to enhancing the region's brand. The region's tourist products become better recognisable among other Irish tourists offers and attract more tourists by focusing on history and cultural heritage.

4.7.3 Larger Context

The Ancient East grant scheme for storytelling interpretation is embedded in Ireland's and the region's tourism strategies. As such, outputs of the grant scheme contribute to long-term impact.

The 2015 policy document "People, place and policy – growing tourism to 2025" by the Irish department of transport, tourism and sport proposes to increase levels of overseas revenues to secure the sector's growth. The document also acknowledges that Ireland's tourism offer would need to distinct itself from offers elsewhere. It proposes among others to do so by providing living historical stories, interesting and informative experience and attractions in urban and rural areas.

Fáilte Ireland helps to support tourism industry growth in Ireland through its investment strategy⁶⁸, which underpins all our investment in tourism capital projects, including all grant schemes and strategic partnerships. Through this strategy, they aim to deliver genuinely innovative projects that will transform visitor experiences for Ireland's target markets while supporting jobs in the industry and protecting the natural environment.

The strategy provides a background and framework to implement the Irish Tourism Development and Innovation Fund and build upon the VICE model.

⁶⁸ Fáilte Ireland (2015): Tourism Development and Innovation. A strategy for investment 2016-2022. https://www.failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/2_Develop_Your_Business/6_Funding/FI-Tourism-Investment-Strategy-Final-07-06-16_1.pdf

Experience Development Framework in Irelands Tourism Investment Strategy 2016-2022



Source: Fáilte Ireland (2015): Tourism Development and Innovation. A strategy for investment 2016-2022

It places thus the interaction between visitors, the industry and community at the heart of the strategy and places the consumer that the centre of all tourism development. It does so via four proposed mechanisms to implement the fund, namely grant schemes, strategic partnerships, signature experience plans and direct investments. These four mechanisms supplement one another by focusing on different aspects, such as capital investments, capacity building and community building. Together the four mechanisms help to maintain and grow Ireland’s image and “cut through the noise” of international tourism by providing experiences that appeal to potential visitors, satisfy consumer segment needs and force them to reappraise Ireland as a destination.

The strategy developed a brand proposition for the Ancient East. The overarching theme for Ireland’s Ancient East focuses on “5000 years of European history, lush green landscapes and stories told by the best storytellers in the world”. It becomes clear that storytelling is a key element in developing tourism products for the Action East.

The strategy proposes four delivery mechanisms for allocating funding in accordance with the Investment Strategy: 1) Grant Schemes, 2) Strategic Partnerships, 3) Signature Experience Plans, and 4) Direct Investment.

2022 Vision for the Ancient East



Source: Fáilte Ireland (2017): “Path to Growth” Development of Ireland’s Ancient East.

A number of focused, outcome based and competitive grant schemes which are aligned to the key experience brands was to be developed. One priority for investment was the **Innovation and Product Development**, defined as the introduction of the various brand propositions as a catalyst for the development of new tourism experiences in towns, villages, attractions and activities, and new opportunities within tourism.

Fáilte Ireland's five-year plan, "Path to Growth" for the development of Ireland's Ancient East translates national objectives to the context of the Ancient East. It shows how the grant scheme and ideas on storytelling are based on research to develop the regions' and Ireland's branding and on visitor profiling. The plan defines four strategic priorities to focus resources and efforts to develop Ireland's Ancient East brand and attract visitors, namely (1) developing visitor experience, (2) creating visitor awareness, motivation and engagement, (3) achieve stakeholder and community engagement, and (4) encourage enable to develop Ireland's Ancient East.

These four strategic priorities are further detailed in specific objectives, possible initiatives, key performance indicators (milestones), and desired outcomes and results.

The plan aimed to have supported inter alia a growth of 9% in tourism employment, a growth of 17% of domestic tourism revenue, 20% increase in international tourism revenue, 18% increase in visitor numbers to Ireland's Ancient East, and 11% increase in bed nights in Ireland's Ancient East. However, the pandemic slowed down the achievement of these objectives. In the most positive scenario, Fáilte Ireland expects that the number of overseas tourists reaches 2019 levels in 2024, depending of course on the development of the pandemic and different opening strategies. Domestic tourist trips may reach 2019 levels already in 2022 in the most positive scenario and in 2023 in the more conservative scenario. Possibly the Ancient East's storytelling and interpretation grant scheme contributes to a positive redevelopment of Ireland's tourism. After all, investments in storytelling enhances the quality of tourism products which aligns with the eight point of Fáilte Ireland's redevelopment strategy: "delivering excellence – ensuring our delivery is best in class".

The process and the successful implementation of the grant scheme in the counties of the Ancient East lead to a similar grant scheme for Dublin and other destinations. Lessons learned highlight the practical organisation of the grant scheme and to the good support from the experts to the beneficiaries.

4.7.4 Lessons learned

Two main factors have been important for the scheme's main success for destination management organisation, namely managing the expectations of beneficiaries and using the grant to achieve wider objectives. Two documents helped to achieve this: First, the **Interpretation toolkit** played a central role in explaining the basic requirements for designing and implementing storytelling. Second, the **Guidelines for the Grant Scheme** presented the main requirements and the application process. Fáilte Ireland developed both documents and use it a key tool for the development and implementation of the 2017 grant scheme. The toolkit translates the region's brand and strategic objectives into practical tools and techniques for storytelling and interpretation. It does so inter alia by focusing on the target group and encouraging place-based stories, based on local and the attraction's history. The toolkit functioned as red thread. Applicants needed already to express their ideas to using the toolkit in their proposals, among others by assessing a storytelling gap. During project implementation the toolkit was used to remind beneficiaries on the grant's objectives. The toolkit helped thus to manage the beneficiaries' expectations of the grant's outputs. The close cooperation between Fáilte Ireland's staff and the project partners enhanced this expectation management.

Using practical product improvement via the provision of a grant to achieve wider objectives was another key success factor according to the destination management

organisation. The grants were a means to further differentiate the tourism offer in the Ancient East from Irish other regions. Through the grant agreement, attractions were obliged to reconsider their marketing and commercialisation as well as opening hours and language provision. This improved the outward communication of the tourism offer of the region. The grant's place-based approach and focus on storytelling ensures that the tourism products highlight the region's strengths in line with its brand.

Despite the overall successful implementation of the grant scheme, the destination management organisation acknowledges two aspects that could have been better. At first, the grant scheme required a guarantee from the beneficiaries. For many beneficiaries this was hard to organise. Some potential applicants did not submit an application due to this administrative requirement. Secondly, the destination management organisation underestimated the time and efforts it would take beneficiaries to organise public procurement to engage contractors for the development and implementation of (digital) storytelling solutions. In most cases, this phase took longer than expected with as result that the projects ended end of 2019 instead of June 2019. Engaging partners to develop and implement these solutions was further challenged by the small domestic market for such services in Ireland. Only few organisations had the required expertise for the envisaged digital storytelling solutions. In some cases, these organisations were already engaged in other assignments by the time the beneficiaries needed their services. As a result, the planning of projects needed to be adjusted. Contracting foreign organisations was no solution either. Due to the small project size and thus small financial size of potential contracts it would have been too costly to fly in such experts. Afterall, good storytelling and interpretation solutions demand good knowledge and feeling of the site. The implementation of the solutions required thus frequent visits of the sites and thus limited the contracting to Irish organisations.

Both challenges have been reflected upon before the launch of the Dublin storytelling and interpretation grant scheme. The requirement of a guarantee has been dropped and Fáilte Ireland takes the risk for these relatively small projects. Also, more guidance and support for public procurement is provided.

4.7.5 Conclusion

The example of the Ancient East storytelling and interpretation grant scheme shows how a grant scheme can be used to promote storytelling in local attractions, to stimulate the use of digital tools for innovative tourism product development and to strengthen a tourism destination brand.

Strategic guidance and operational support to beneficiaries are important to connect the grants to overall tourism objectives for a given destination. Grant schemes are delivery mechanisms for wider strategic goals. The Ancient East grant scheme deliberately contribute to the wider of objectives of strengthening the brand and attracting more tourists, notably from abroad. Following the lessons from Fáilte Ireland, the grant scheme should thus be seen as a means and not an end in itself.

Obviously, ERDF funds can be used for similar business support and grant schemes, in particular for SMEs. Success factors are clear indications on the (a) envisaged target group for activities, (b) a specific thematic and place-based focused, and (c) examples of possible operations. Developing a toolkit for the potential beneficiaries can be helpful to communicate on wider objectives and connecting with other services in the tourism ecosystem.

4.8 Online Academy Dachstein Salzkammergut in Upper Austria

This case study report describes the approach of a tourism destination to increase the overall quality and effectiveness of the destination by supporting the learning and development of local tourism companies (mostly SMEs) and employees with courses

and advice on digital skills and the use of IT technologies in tourism offered via an 'online academy'.

4.8.1 General information

The Inner Salzkammergut is the name given to the region in the south of the Salzkammergut in Upper Austria which is formed by the four Hallstättersee municipalities of Bad Goisern am Hallstättersee, Hallstatt, Obertraun and Gosau. The touristic name used for marketing is Dachstein Salzkammergut. In 2018, the Dachstein-Salzkammergut region exceeded the 1 million mark in overnight stays. The four municipalities with 11,000 inhabitants thus accounted for one eighth of all overnight stays in Upper Austria in that year.

The Salzkammergut is acknowledged as UNESCO World Cultural Heritage. The area was shaped over centuries by the state salt industry, which can be traced back to the beginning of the 14th century. The interplay of natural environment and significant human interventions form this widely known cultural landscape.

Within the framework of funding programmes of the European Union, a good part of the Salzkammergut (the municipalities of Ebensee, Bad Ischl, Bad Goisern, Hallstatt, Obertraun, Gosau, St. Wolfgang since 1994, Strobl and St. Gilgen since 2001) is organised by name under Cultural Heritage Salzkammergut as a LEADER+ region, and has also formed the association Regionalentwicklung Inneres Salzkammergut RegIS since INTERREG II (1995).

Tourism in the region is organised and managed by the multi-community Inner Salzkammergut Tourism Association⁶⁹. Approx. 20 employees are responsible for the development of the destination and for looking after guests in the four tourist offices in the 'Dachstein Salzkammergut holiday region'. The Inner Salzkammergut Tourism Association aims at supporting its members, mostly the hotels, pensions and other room rental services, as well as restaurants and tourism activity services in the region.

In 2018, they decided to extend their service and offer advice and training to their members on digital skills, online marketing and other IT related topics. The Dachstein Academy was born.

4.8.2 Description of the policy initiative

The Dachstein Academy offers the owners and employees of businesses in the Dachstein Salzkammergut holiday region an opportunity to improve and further develop their education in relevant online topics in a short time. In 2019, the Dachstein Academy was expanded and a separate website was also set up for the digital continuing education of our businesses. Today, the Academy consists of 4 pillars 'digital.training' (offline), 'online.training', 'eCoaching' and 'digital.news'. The overall package offers basic and advanced information to optimally present products and services in the digital world.

The Dachstein Salzkammergut Academy bundles knowledge on tourism-related digital and online topics in this specially designed e-learning portal. All tourism partners of the Dachstein Salzkammergut Region are thus able to access an extensive pool of knowledge. The courses consolidate the basics and provide input in a wide range of areas: online marketing, social media, digital communication, website, internet, booking systems. Detailed explanatory videos convey complex tourism content in a simple and understandable way. These can be called up at any time, which means knowledge transfer independent of time. The courses are provided free of charge in individual modules and can be accessed 24 hours a day in the online portal. This is organised by a specific e-learning team under the umbrella of the overall destination management.

⁶⁹ <https://dachstein.salzkammergut.at/>

Usually, training on digital aspects of tourism business and destination management is not easily accessible or not attractive for SMEs and small companies. This means that a lot of potential to become more efficient, to use new technological and digital opportunities and to become more visible among potential clients is lost. SMEs and self-employed professionals suffer also from high opportunity costs – every minute spent on training is lost to generate income or manage the urgent things of day-to-day business. Therefore, training offers for small companies have to be cheap, flexible, accessible, attractive and effective in order to have an impact on the skills of employees and on the companies.

The Dachstein Academy has been developed as a tailored training interface for tourism SMEs and small companies in the specific tourism region of Hallstatt-Dachstein/Salzkammergut.

Training at the Dachstein Academy is free of charge. Only a small contribution towards expenses is charged. Access to training is highly effective. Because of the online and digital training offer, no time and money are lost due to long car journeys, long absences.

Project website

The screenshot shows the website for Dachstein Akademie. The header includes the logo 'DACHSTEIN salzkammergut Akademie' and a navigation menu with links: home, eCoaching, digital.training, online.training, digital.news, and kontakt. The main heading is 'Die Dachstein Akademie'. Below it, a paragraph describes the academy's mission: 'Die Dachstein Akademie bietet den Eigentümern und Mitarbeitern der Betriebe in der Ferienregion Dachstein Salzkammergut eine Möglichkeit, sich in kurzer Zeit zu den wichtigsten Online Themen weiterzubilden.' Another paragraph states: 'Sie besteht aus den 4 Säulen digital.training, online.training, eCoaching und digital.news. Das Gesamtpaket bietet grundlegende und weiterführende Informationen, um die Produkte und Dienstleistungen in der digitalen Welt optimal darzustellen und einfach verfügbar zu machen.' To the right, a 'Vorteile' (Advantages) section lists: '+ Kurze Inputs mit viel Output', '+ Weiterbildung zum besten Preis', '+ Mitarbeiterförderung und -motivation', and '- Up-to-date bleiben'. Below this, a paragraph explains: 'Mit der Dachstein Akademie bleibt ihr up-to-date. Die Schulungen werden am tagesaktuellen Stand gehalten, durch die digital.news werdet ihr auf Updates immer aufmerksam gemacht – sowohl zu Themen der Digitalisierung allgemein als auch regionsspezifisch.' At the bottom, four yellow buttons with arrows point to: 'Zum eCoaching', 'Zu den Schulungen', 'Zu den Videokursen', and 'Zu den Neuigkeiten'.

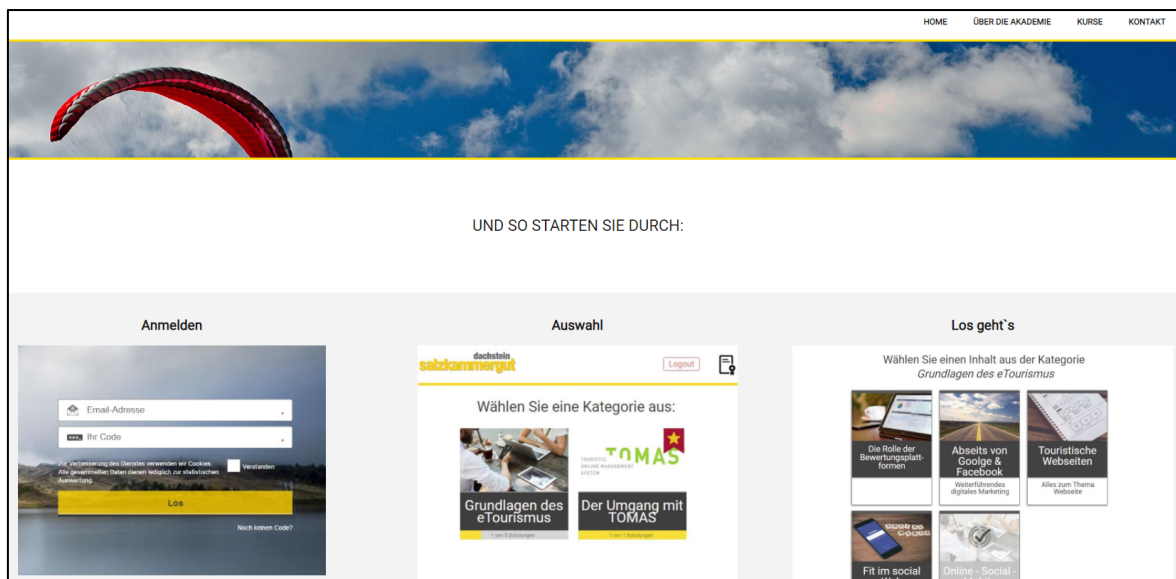
Source: <https://dachstein-akademie.at/>

The content of the Dachstein Academy's training courses is concise, up-to-date and simply explained. Interested learners can prepare training courses with short videos in the 'online.training' section. In the training sessions, learners will then receive the input they need to be able to implement what you have learned immediately after the training. For more in-depth training, learners can watch videos in the 'online.training' again and also arrange individual consultation appointments with the 'eCoaches'.

A relevant aspect that makes this case an innovative good practice is that the Dachstein Academy is offered by the Regional Destination Management Organisation (DMO) itself and, thus, is very close to the actual needs and possibilities of the local tourism companies. Four employees of the tourism association have been trained as 'e-coaches' to support the local companies and members of the tourism association in the areas of digitalisation and online marketing. This training was organised in 2018 (and still is regularly organised) by the regional tourism association of Upper Austria for all local tourism offices.

They have created also the regional Upper Austria network of 'eCoaches' that helps the coaches to stay tuned and in touch with each other. However, not all local tourism associations have created a support portal like the 'Dachstein Academy'.

Online Academy landing page



Source: <https://dachstein-salzkammergut.teejit.de/home/kurse.php>

The 'eCoaches' in the Dachstein Salzkammergut offer support, for example, in the following areas:

- On-Page: What does your website look like? Is it guest-friendly? Is it Google-friendly? How much do you pay for your website? Do the costs correspond to the benefits?
- Off-page: On which other websites can people find your business and how?
- Search engines: Is your business found?
- Social media: Facebook, Instagram and Co. What do you post when, how and where?
- Evaluation management: What do your evaluations look like? How do you react to reviews? Do you receive reviews?
- TOMAS and TOURDATA: What do you need it for and how do you use it best?

Four 'e-coaches' in the Dachstein Academy help the companies. They are employees of the tourism association who have received a specific training and receive regular training updates. They carry out their normal tasks in the association and, in addition, they participate in the coaching and training activities. The eCoaches are also responsible for

analysing the needs of the local companies and to fine-tune the offer to the specific needs through surveys and feedback from the beneficiaries.

The tourism association has support from different professional services. A local company is in charge of the web design, while the content update is carried out internally at the Dachstein Academy. In technical aspects of the online portal they are supported by a specialist company from Vienna. Also for the training content, in particular the learning videos, an external partner is involved, in this case, a company from Germany, called Teejit, experts on tourism digital training⁷⁰.

Online Digital training courses in the Academy (face-to-face or online)

The screenshot shows the Dachstein Akademie website with a navigation menu (home, e-coaching, digital training, online training, digital news, kontakt) and a search icon. Below the header, there is a search bar and a 'Kostenlos' button. The main content area is titled 'MÄRZ 2021' and lists four training courses:

| Course Title | Date & Time | Location | Cost |
|---|-------------------------|----------------------------|-----------|
| Relaunch im Tourismus: „Was tun wenn wir wieder öffnen dürfen?“ | März 4 @ 10:00 - 12:00 | Online Schulung Österreich | Kostenlos |
| Social Media – Basiswissen Facebook & Instagram | März 9 @ 10:00 - 12:00 | Online Schulung Österreich | Kostenlos |
| Wie „klickt“ mein Gast? | März 11 @ 10:00 - 12:00 | Online Schulung Österreich | Kostenlos |
| Datensicherheit und Datenschutz | März 23 @ 10:00 - 12:00 | Online Schulung Österreich | Kostenlos |

Source: <https://dachstein-akademie.at/>

The service is financed by the tourism association, thus, indirectly by the public sector and the fees of the members of the association.

The service of the Dachstein Academy is still under development. In 2019 more than 50 trainings and coaching sessions were held. In 2020, the activity was limited, due to the

⁷⁰ <https://www.teejit.de/>

COVID-19 pandemic shock. The training was limited to online sessions and videos and coaching to phone sessions.

For the next years, the Dachstein Academy plans to produce their own tailored training videos and content. It is also foreseen to extend the service and offer more trainings and coaching sessions.

In the medium and long term it is expected that local tourism companies, despite their limited size and limited knowledge of IT and technology, can benefit from better access to specialised training and thus develop better digital skills to improve their internal management and business administration, to improve their online visibility and marketing, to improve communication with the clients and fidelity management and to add to the reputation management of the holiday region.

In an interview the Dachstein Academy raised the importance of online information and online contact between tourism companies and tourists, especially to re-start business after the COVID-19 break and build up confidence into a safe and healthy tourism.

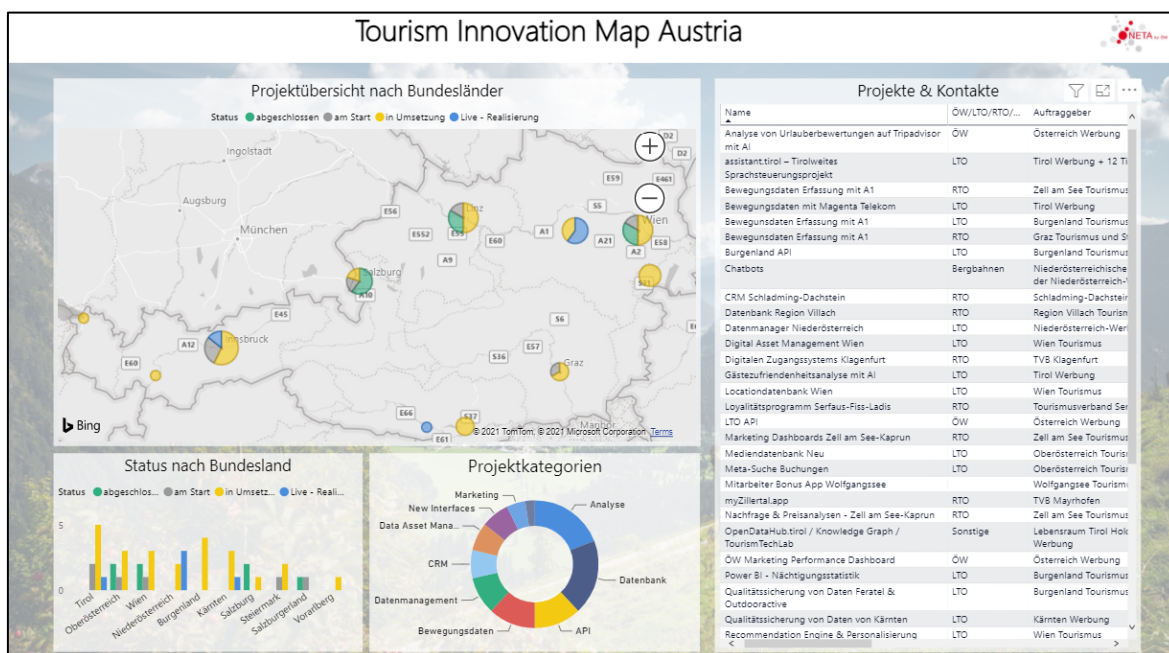
4.8.3 Larger Context

The initiative is developed within the overarching context of tourism innovation in Upper Austria and Austria.

The Upper Austrian Tourism Strategy 2022 promotes the digital transformation of Upper Austrian tourism businesses. A key objective within the framework of the Regional Tourism Strategy Upper Austria 2022 was the qualification initiative with regard to the challenges of digitalisation. One concrete measure to promote digital skills among tourism companies and DMO was a tailor-made "**Upper Austria eCoach programme**" to support tourism businesses and tourism organisations in digital topics. The eCoach system combines the two milestones of people and qualification in a digitalised world for the employees of the tourism associations and subsequently also for the tourism businesses. An eCoach is a specially trained employee of the regional tourism association who supports tourism businesses with questions on digital topics and offers "help for self-help". The programme is a partnership between the regional tourism association Upper Austria Tourism Ltd, the Regional Government and the Chamber of Commerce of Upper Austria. The Upper Austria eCoach programme was launched in 2019 with the Johannes Kepler University in Linz, as part of their MBA Tourism Management course. The training content covers a wide range of digital topics in tourism such as booking platforms, evaluation platforms, search engine optimisation (SEO), online marketing, legal aspects on the web, texting on the web, social media marketing, search engine advertising (SEA) as well as communication and coaching. The most recent Upper Austria eCoach course started in March 2021 and was exclusively for employees of the Upper Austrian tourism associations.

At national level, many local and regional initiatives are presented in the national innovation platform **NETA (Next Level Tourism Austria)**. This platform works on new digital communication and customer loyalty solutions for tourism. Next Level Tourism Austria (NETA) is a network initiative at the interface between Austria's traditional tourism structures and the global travel & communication tech scene. NETA works on different initiatives, for example, the neta:timtalks or the Tourism Innovation Map Austria. The neta:timtalks present innovative projects in the Austrian tourism industry in short interviews. Among other things, questions are asked like: What was the motivation to implement this project? How did the idea come about? How are moments of doubt dealt with in the project? What lessons were learned? This format is intended to serve as a source of inspiration for new projects. The Tourism Innovation Map Austria (TIM) makes digitisation projects in domestic tourism visible. In ten categories projects ranging from movement data to voice control throughout Austria are included. An interactive map gives an overview of current projects in Austrian tourism by region.

Tourism Innovation Map Austria



Source: <https://www.austriatourism.com/blog/2019/neta/tourism-innovation-map-austria/>

4.8.4 Lessons learned

According to the Dachstein Academy, this initiative has received a good uptake by the local tourism companies. Three factors can be highlighted as key ingredients for the success.

1) The input via the Upper Austria eCoach programme and the connections to other eCoaches through the Upper Austria eCoach network. This training has prepared the new eCoaches for dealing with the requests and needs from local tourism companies. Even in COVID-19 times, the virtual network connections via social media and video conferences have helped to stay updated and be able to support the companies and promote new approaches for coaching and training.

2) A tailored and individual approach for the local companies is necessary. There is a wide range of pre-existing knowledge regarding digital and online skills. Trainings have to be very specific on certain topics. Individual coaching sessions are often better than group trainings, because the participants can have very different needs.

3) Learning fast from feedback. It is important to try new things and to ask the participants for feedback on effectiveness and added value. This feedback is crucial when trying to learn and improve the service. At the same time, services and tools in the digital world change fast and need to be constantly updated and adjusted to customer needs. This also makes it necessary to think in continuous updating and improvement cycles.

The main pitfall to avoid, according to the promoters of the Academy, is to use one-size-fits all approaches for training and advice for all tourism businesses. Capacities and skills can vary from very low to very professional already. This means also the support need to adjust and be as personalised as possible.

4.8.5 Conclusion

This case shows how holiday regions and, in particular destination management organisations and tourism association, can prepare the tourism businesses in their

region for future trends (digitisation, high quality) to recover quicker from the crisis through investing in high-quality and inclusive tourism models. Through a “train-the-trainer” approach, the regional tourism association helped the smaller local association to develop own, in-house skills for digitisation in tourism. This can then be translated into a tailored and targeted support for the local tourism businesses which are mostly small and micro companies. Support, advice and training in digital skills for them is free-of-charge and close to their home (or online), so that they avoid costly or time-intensive trips to larger cities.

This case shows how micro and small tourism companies can benefit from the digitisation through smart and place-based support schemes, and how even local tourism agencies can build up a support service for local SMEs. The example shows that this service can be offered in-house by a local tourism association, no need for large investments are high maintenance costs are necessary. The service is scalable and can be expanded with the support of experts and remote training. This initiative can be transferred to many other regions and tourism destinations.

4.9 Improving Tallin’s port infrastructure: developing a sustainable tourism destination

The case study shows how new infrastructure works is needed to reduce negative environmental effects of tourism and to develop sustainable destinations. The case focuses on the development of a deep sewage, a micro-tunnel, at the port of Tallinn so as to guarantee the required volume of wastewater admitted from ships at all active berths.

4.9.1 General information

Cruise tourism is growing in many European coastal cities, including the Mediterranean, Atlantic coast, North Sea and Baltic Sea and all EU Outermost Regions. Cruise tourism is the holiday that has grown faster than any other in the last 20 years. But it is also the most polluting model of vacation, one of those who has a higher incidence in the total CO₂ production in the tourism sector, and that is guilty of the destruction of marine ecosystems. To make it sustainable, there are many different measures, one of them is the improve the port reception facilities to reduce vessel waste and sewage reception.

Tallin is a major harbour for Baltic Cruises. It is marketing itself as a cruise destination with several specific features: It is a UNESCO World Heritage destination, the harbour located in the city center, close to the Old Town and main tourist attractions. It has a special cruise piers and cruise vessels’ servicing area and is capable of accommodating 4-7 cruise ships at the same time. The port is home to 10 million passengers annually and one of the biggest ports in Estonia.

In 2016, the International Maritime Organization (IMO) decided that passenger ship wastewater discharges into the Baltic Sea would be banned from 2021 onwards. This decision makes the Baltic Sea the first region in the world where wastewater from passenger ships must be discharged at the port. The Tallin Port Authority decided to react as soon as possible and create a technical solution for the problem of wastewater disposal of ships in Tallin.

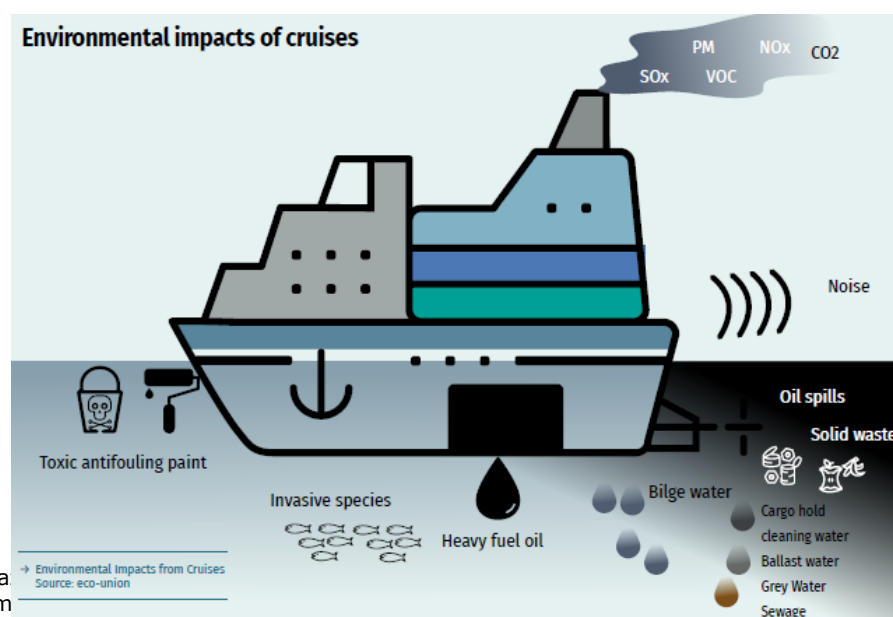
The project featured the installation of wastewater pipeline connections in the cruise terminal pier, directly connected to the municipal sewerage systems. This was expected to fasten the process of discharging and eliminate the need for costly and comparatively inefficient transport by truck. For this purpose, the Port of Tallinn, invested EUR 2 million to connect the port’s sewage pipeline to the city wastewater network, thereby increasing the reception capacity per hour by 1,000%.

4.9.2 Description of the policy initiative

Estonia actively works on becoming a major cruise destination in the north of Europe. Cruise tourism is an important element of bringing visitors to coastal cities and regions. Usually, this leads to an exploding number of day-visitors in urban areas of coastal cities and nearby destinations, even though the economic benefits of these visitors to the local communities are quite limited.

Cruise tourism has severe negative effects on the environment and the climate⁷¹. Cruise ships are more energy intensive than other touristic activities. Estimates of the carbon emission factor range between 246 to 2500 g per passenger kilometres, confirming that cruising is the most carbon intensive means of transportation. Cruise ships produce on average three to four times as much CO₂ per kilometre than an economy class plane passenger. Oceanic cruise ships produce at least 17% of the total emissions of nitrogen oxides, contributing to more than a quarter of total emissions of nitrogen oxides in port cities and coastal areas. Cruise ships are the source of numerous streams of wastewater. Black wastewaters are especially damaging to ecosystems (bacterial and viral contamination) and causes eutrophication due to nutrient density. Cruising damages marine habitats. Though cruising represents less than 1% of the merchant fleet, it accounts for 25% of waste. Recyclable materials such as glass or metal are increasingly separated and kept apart for recycling onshore, but some disposal at sea still occurs.

Environmental impacts of cruises



Source: Tona
Blue Tourism
Barcelona

u, O. (2019):
s. Eco-union.

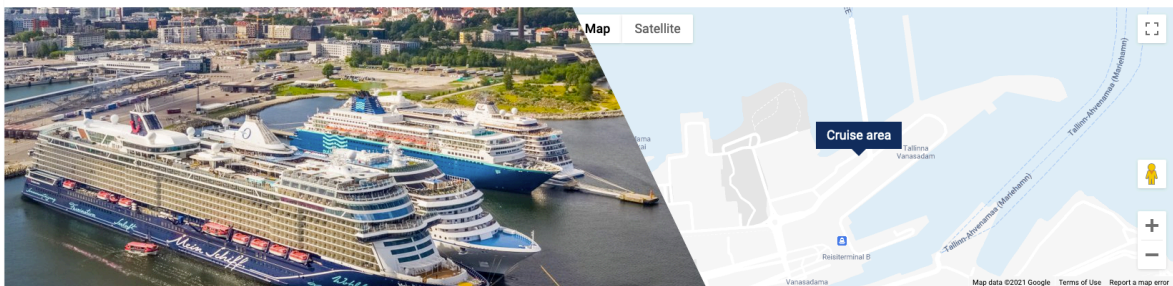
Improving sustainability in the cruise sector is important in the light of increased customer environmental awareness and environmental regulations. It can be observed that an increasing number of (cruise) port stakeholders (e.g. regulatory authorities) demand a better management of negative externalities caused by port and vessel operations. In particular, the regulation of port areas is becoming ever more stringent.

⁷¹ See for the following details: Tonazzini, D., Fosse, J., Morales, E., González, A., Klarwein, S., Moukaddem, K., Louveau, O. (2019). Blue Tourism. Towards a sustainable coastal and maritime tourism in world marine regions. Eco-union. Barcelona.

Protecting the environment and improving the level of sustainability will be more and more fundamental for the continued success of the cruise tourism industry⁷².

The port of Tallinn is the biggest tourism gateway in Estonia and one of the busiest passenger harbours in the Baltic Sea Region, serving up to 10 million passengers a year. In addition it is also a popular and one of the biggest cruise destinations of the region, while there is a separate cruise area in the Old City Harbour for serving cruise passengers⁷³, having more than 300 cruise ship calls a year⁷⁴.

Tallinn Cruise Ship Terminal



Source: <https://www.ts.ee/en/cruise-area/>

The Tallin Port Authority decided to create a technical solution for the problem of wastewater disposal of ships in Tallin. The project featured the installation of wastewater pipeline connections in the cruise terminal pier, directly connected to the municipal sewerage systems. The micro-tunnel allows ships stopping at the Old City Harbour to dispose now unlimited quantities of wastewater. The wastewater is then treated at Tallinn's treatment plants.

The construction began in May 2016 and was finalised already the same year. In 2017, the Port of Tallinn won the first prize at the Seatrade Cruise Awards ceremony in the environmental initiative category for its micro-tunnel. The micro-tunnel construction has contributed to the development of a more sustainable tourism destination.

As a result it increased the reception capacity and at the same time respects the International Maritime Organisation requirements. Therefore, the micro-tunnel allows for the disposal of unlimited quantities of wastewater, which are then treated at Tallinn's treatment plants (Scholz & Friends Agenda berlin GmbH European Office, 2020).

For the micro-tunnel construction, the port of Tallinn has requested and received EU funding from the projects Twin-Port I and Twin-Port II, two projects on the maritime link between Helsinki-Tallinn. The cost of the total project was EUR 2.5 million, with EU 690,000 being funded from EU funds.

The micro-tunnel built at the port of Tallinn was constructed by TS Energia, a subsidiary of the port of Tallinn back in the day, and now merged with the Port of Tallin company. To the construction work contributed the company Green Marine. The work regarded the construction of a micro-tunnel, i.e. a deep sewer pipeline at the Old City Harbour and connecting it with the deep sewer system of the city. This would allow a better reception of the sewage from passenger ships and cruise ships⁷⁵.

⁷² See HPC Hamburg Port Consulting GmbH (2019): Green Cruise Port Action Plan 2030. Final Report. Interreg Project 2016-2019 BSR.

⁷³ <https://www.ts.ee/en/old-city-harbour/>

⁷⁴ <https://www.ts.ee/en/cruise-area/>

⁷⁵ <https://www.ts.ee/en/large-scale-construction-works-start-in-old-city-harbour-please-take-time-when-entering-or-exiting-the-harbour-area/>

In 2017, Port of Tallinn won the first prize at the Seatrade Cruise Awards ceremony in the environmental initiative category for its micro-tunnel. In 2019, the project was included as 'Best Practice' in the '2019 European Capital of Smart Tourism competition'.

The micro-tunnel aimed to benefit first and foremost the city of Tallinn as tourist destination in the Baltic Sea Region. At a larger scale, the micro-tunnel has been of benefit for the overall environmental situation in the Baltic Sea Region. The Baltic Sea is one of the most polluted and most ecologically vulnerable seas in Europe and hence banning sewage discharge into the sea helps protecting the environment and the sea situation.⁷⁶ Although the envisaged primary impact of the initiative has been to have a cleaner port, it is directly linked to two wider long-term impacts for the region and the tourism sector: environmental sustainability and quality of the Baltic Sea Region and improving the tourism offer and particularly cruise tourism through more sustainable solutions.

4.9.3 Larger Context

The project is embedded in various trends and developments at national and international level to make cruise travel and the blue economy in general more sustainable.

Estonia has made a shift towards more sustainable tourism, by acknowledging inter-modality, standardising sustainability principles, as well as investing in skilled workers, hospitality and reflecting on overtourism consequences on local communities and citizens (Baltic Sea Parliamentary Conference, 2018). The micro-tunnel links to the improvement of the port reception facilities to reduce vessel waste and waste sewage reception initiative to the overall sustainability shift of Estonia, indicating indirect links to the Smart Specialisation Strategy.

The Port of Tallinn is a pioneer among EU ports in providing incentives for ships to reduce emissions and sort waste⁷⁷. Tallinn Port defined its sustainability strategy and a major activity plan to decrease the environmental impact of the port and ships staying there. The port of Tallinn has linked its strategy to the UN Sustainable goals and aims at reducing its CO₂ emissions by switching to more environmentally friendly energy sources⁷⁸. The construction of the micro-tunnel is not the only sustainable infrastructure developed at the Port of Tallinn. Since 2019, ships participating in the Environmental Ship Index (ESI) to work towards reducing air emissions may apply for as much as 8% discount on tonnage fees. Additionally, ships which have invested in scrubbers may discharge waste generated by scrubbers without paying additional fees. Waste reception facilities are another key part of the Port's strategy. By 2014, Port of Tallinn had already introduced differentiated port fees for cruise vessels sorting their waste. Among other initiatives belong the recycling of ship generated waste, the green and smart terminal building which is heated through renewable energies and used recycled material for its construction, the cleaning of vessels bottoms for ships embarking in Tallinn.

Tallinn is part of the Cruise Baltic Network. In 2019, an ambitious **Cruise Baltic Sustainability Manifesto**⁷⁹ was created together with all partners of Cruise Baltic as a joint vision towards a more sustainable region and to make cruising a sustainable vacation offer in 2030. The Sustainability Report 2020 is the annual follow-up on the objectives of the manifesto and reflects the most relevant sustainable initiatives taken by the Cruise Baltic ports and destinations during 2020.

⁷⁶ <https://www.ts.ee/en/ships-calling-at-port-of-tallinns-old-city-harbour-will-soon-be-able-to-discharge-unlimited-amounts-of-sewage/>

⁷⁷ <https://www.greenport.com/news101/cruise/port-of-tallinns-sustainable-cruise-model>

⁷⁸ <https://www.ts.ee/en/in-order-to-reduce-emissions-all-ships-in-the-port-must-switch-to-environmentally-friendly-energy-sources-port-of-tallinn-co2-calculations/>

⁷⁹ <https://www.cruisebaltic.com/modularpages/sustainability>

A **Green Cruise Port Action Plan 2030**⁸⁰ was handed over by the EU project Green Cruise Port's partners during the Green Cruise Port conference 'Smart cruise port developments in Baltic Sea region'. One major goal is to ensure the ability to meet sustainability requirements and reduce negative externalities caused by ports and vessel operations. The Interreg Project **Green Cruise Port** (Sustainable Development of Cruise Port Locations, 2016 – 2019, Baltic Sea Region Programme 2014-2020) elaborated a multidimensional strategic approach for a sustainable and qualitative development for future cruise shipping in port areas in the Baltic. Among the environmental measures proposed are actions related to the vessels and the fuels, to ship-port interfaces, to the installations at the pier, to the port area as such and to Cruise Terminal buildings and services. The Estonian micro-tunnel is highlighted as one good practice in this Action Plan.

4.9.4 Lessons learned

Cruise tourism is one of the most polluting tourism models. To make tourism more sustainable will require to make cruise tourism more sustainable. This covers a bunch of environmental measures, not only on board, but in particular in the port areas and on the pier. However, to implement actions is not always easy, given the complex network of actors, environmental regulations and economic interests. The example of the micro-tunnel and the sustainability measures of the Port of Tallinn show that many negative environmental effects can be reduced when the relevant stakeholders work together: Port authorities, Terminal operators, relevant public authorities at local, regional and national level, cruise lines, research institutes, international organisations.

The activities of the Port Tallinn had positive effects on the image and reputation of the port and the city of Tallinn. Sustainability and social responsibility become more and more an asset for the attraction of employees and investors. They also help to meet ever more strictly international conventions and regulations. But they also help to increase the productivity and efficiency of the port and cruise activity.

To become more sustainable, strategic action based on knowledge and evidence is needed. A Sustainability Plan for a cruise line or a port should involve specific and quantitative objectives. However, setting concrete, ambitious but also realistic and achievable objectives is a complex and long-term process in which several partners need to be involved. To set an emission-reduction objective, for example, a detailed emission inventory and forecast must be available. At the same time, the targets should be evaluated from the perspective of the policy context at the local, regional, state and national levels. Certainly, some challenges remain. In relation to R&D, more efforts need to take place as more solutions need to be explored for the future. An example is the future of hydrogen for which little is known. Some challenges also regard the procedure for approving and designing the process and plan with the local authorities.

4.9.5 Conclusion

Different drivers have led Port of Tallinn towards adopting more sustainable solutions, coming from the governance, business, policy and people fields. One driver has been the change in the regulations as regards wastewater discharge limits at ports to which the Port of Tallinn had to comply, too. Another driver is the environmental regulation and the need to improve the Baltic Sea status. Further drivers regard the general global discourse and understanding on sustainable development.

EU policies such as the Green Deal, the national government's strive towards achieving the goals of carbon neutrality by 2050, as well as global initiatives such as the UN Sustainable Development Goals also contribute to changing mindsets towards more sustainable solutions. However, it has not only been the policy and governance side that has been active in that respect. Also the demand side and the business side are directed

⁸⁰ <http://www.greencruiseport.eu/Home.html>

to a more sustainable future. More concretely, the cruise ships side also focuses on environmental issues and solutions and asks for more sustainable solutions. Last but not least, the local communities and people have also been considered, as they face the hardest pressure from the environmental consequences, linked in that case to tourism and its effects.

The Covid-19 pandemic has proved, among others, that more environmentally sustainable solutions are necessary for the future. The port of Tallinn approach can help the region recover easier and be in a better position in the medium-long term through further investing in more eco-friendly and responsible tourism models, as these are trends that are likely to stay in the long run. Thinking long-term is key to design such initiatives and ripe good results and outcomes in the future.

The Tallinn case is an example of a good practice where infrastructure has supported the reduction of environmental effects through reducing the cruise ship passenger wastewater in the port of Tallinn and at the same time improving the touristic profile and product of the region. Other port cities in the Baltic Sea, the North Sea, at the Atlantic Coast, in the Mediterranean as well as the Outermost Regions can learn from this example and develop similar approaches to become more sustainable and develop a more sustainable cruise tourism model together with the cruise lines and travel operators. EU Funds can support such initiatives across the EU under Policy Objective 2 on a 'greener, low-carbon Europe', as in the future more similar solutions will be necessary.

4.10 Innovation in Crete's tourism sector through the smart specialisation strategy (S3)

The case study focuses on the importance of including tourism in the regional smart specialisation strategies in the funding period 2014-2020. The boosted innovation in the tourism sector. The RIS3 of Crete has a cultural-tourism complex aiming to bridge the two with innovation. The case study presents beyond the RIS3 context also some additional initiatives of Crete that have bridged innovation with sustainable tourism.

4.10.1 General information

Crete is the second largest island in the Eastern Mediterranean Sea and the fifth in size in the Mediterranean basin. With a total area of 8,336 km² and a population of 634,930 inhabitants (2019) (Eurostat, 2020), it is an important tourism and services hub and, despite being an island, is one of the most important agricultural regions in Greece.

Regional GDP per capita⁸¹ decreased from EUR 18,400 in 2010 to 18,100 (2018), ranking the region in eighth place among the 13 Greek regions, below both the national (21,100) and the EU (31,000) averages (Eurostat, 2020). The economic crisis had as a consequence an increase of the unemployment rate. In 2013, the unemployment rate was as high as 25%. The most affected sectors were trade and particularly construction. By 2019, the unemployment rate had dropped to 11.7%, representing 33,400 people unemployed (Eurostat, 2020), putting Kriti in the best position of all Greek regions regarding unemployment rate, below the national average (17.3%).

According to Eurostat (2020), the services sector dominates the regional economy and accounts for 79.3% of the regional Gross value added (GVA), while the secondary sector share was 13.5% and the primary sector 7.3%.

Annual visitors in the island, during the last years, exceeded 5 million, while most of them are coming during the period from April to October each year. Tourists choosing Crete for their vacations use air transportation while the British, Germans and

⁸¹ In purchasing power standards (PPS)

Scandinavians dominate among its annual visitors. The tourism industry is very important for the Cretan economy and its share in the regional GDP is estimated at 47%⁸².

Most of the regional services firms are organised around tourism and exports of agricultural products and are not international in scope. Tourism is the most dynamic sector and the increased arrivals over the past decades gave incentives for important investments in hotel units, resulting in the qualitative and quantitative upgrading of the infrastructures. However, the sector is facing structural problems. According to the Regional Innovation Scoreboard 2019 (RIS 2019), the region of Kriti is ranked as a "Strong Innovator", and innovation performance has increased over time⁸³.

However, the regional research and innovation activities usually focused on basic research, the manufacturing and the agricultural sector, with important hurdles to connect to the service/tourism sector. Traditionally, in Crete the innovation ecosystem actors were separated from the tourism ecosystems. With its Smart Specialization Strategy (S3) 2015-2020, Crete tried to overcome this fragmentation and bringing structural innovation into their main business sector for a higher value added and more sustainable business activity.

In 2015, the S3 strategy for Crete was developed in 2015 following the need for increased smart specialisation in Europe. Smart specialisation builds on identifying each region's competitive advantages in different market sectors, emphasising strategic priorities and implementing action plans. Therefore, the Regional Innovation Strategies or S3 are integrated and place-based strategies building on the regional priorities, strengths and bottom-up processes of EU regions. The call was launched by the European Commission; however, each region developed each own strategy bottom up.

In the case of Crete, the region aimed to be dynamic and sustainable. For this, the region in its S3 focuses on four key complexes⁸⁴:

- The cultural-touristic complex;
- The agro-food complex;
- The environmental complex;
- The knowledge complex.

This case study focuses on the **cultural-touristic complex** within the S3 Strategy and related actions and projects.

4.10.2 Description of the policy initiative

The **cultural-touristic complex in the S3 Strategy for Crete** is composed of activities that are linked to the tourism sector, i.e. attraction, reception, hospitality, transportation, nutrition, recreation and touring of visitors, as well as the cultural sector linked to the protection and enhancement of cultural resources. In particular, the S3 aims to combine scientific knowledge with innovation and ICT to boost the international competitiveness of tourism, by enhancing of tourism services, the differentiation of the tourism product on sectors where Crete can develop its comparative advantages,

⁸² The Tourism Industry in the Island of Crete, Greece: Is It Carbon-Intensive?. Available from: https://www.researchgate.net/publication/337905848_Original_Paper_The_Tourism_Industry_in_the_Island_of_Crete_Greece_Is_It_Carbon-Intensive [accessed Jul 01 2021].

⁸³ Description and data on the region taken from the EU Regional Innovation Monitor Plus: <https://ec.europa.eu/growth/tools-databases/regional-innovation-monitor/base-profile/region-kriti>

⁸⁴ Regional innovation strategy, Crete.

enhancing its entry points and promoting the rich cultural heritage and its connection to society and local economy.

Table 1: Areas of Intervention and priorities in the cultural-tourism Axis of Crete's S3

| Area of Intervention | Indicative Priorities |
|---|--|
| Diversification of the tourism product, brand name consolidation | <p>Configuration of networks of excellence to promote research and support innovation in environments of pervasive intelligence for the provision of customised services in tourism - culture</p> <p>Support for innovative methods and promotion of collaborative planning for new forms of tourism and content (living labs)</p> <p>R & D through access of businesses to research infrastructure related to tourism</p> <p>Demonstration projects to promote new, innovative business initiatives that promote alternative forms of tourism</p> <p>Research and innovation to adapt and implement sustainable transport in tourist areas and infrastructures</p> <p>Development, promotion and dissemination of innovations for the interconnection of the tourism product with technologies related to intelligent cities - creation of intelligent destinations</p> |
| Promotion of culture as a competitive element of the tourism product | <p>Development of innovative applications for the interconnection of Minoan, Byzantine and Venetian civilisations with the tourism experience</p> <p>Promotion of the tourism experience through the use of historical documentation</p> <p>Highlighting of innovation in activities related to tourism - culture, such as cultural heritage conservation and the development of creative industries</p> <p>Pilot implementation of integrated management and overall enhancement methods in an archaeological site</p> <p>Utilization of e-ticketing services, e-guide systems, support for networks with a view to optimal promotion and use of the most valuable cultural resources.</p> <p>Enhancing digital services and cultural heritage projection applications, navigation systems, route management in tourist areas</p> <p>Mobile apps-portal innovations</p> |
| Improvement of the tourism value chain's cohesion and establishment of interconnections with other chains and complexes | <p>Creation of a tourism - culture cluster</p> <p>Reinforcement of networks per form of tourism (medical, religious, rural, cultural)</p> <p>Reinforcement of the interconnections of tourism with other RIS3 complexes</p> <p>Reinforcement of the interconnections of the tourism chain with Universities and Research Institutions</p> |
| Enhancing quality and competitiveness for tourism services | <p>Promotion of the image of Crete as a tourist destination by using new technologies.</p> <p>Promotion of non-technological innovations in the tourism value chain.</p> <p>Utilization of ICTs for enhancing focused personal customer service, improvement of interactivity, lower cost of services.</p> <p>Supporting start-ups in the tourism sector and activities linked to culture and creation.</p> |

| | |
|-------------------------------------|---|
| | <p>Development of mobile and Internet applications and for navigation and interactive communication</p> <p>Boosting innovation for developing applications that utilize open data for the provision of value added services related to tourist destinations</p> <p>Promoting innovation in the provision of services / information to passengers at the entry points of the island.</p> <p>Promotion of innovation to serve visitors with disabilities.</p> |
| Skills development of human capital | <p>Development of professional knowledge and skills on tourism to enhance entrepreneurial activity, education and training of personnel involved in cultural sites management</p> <p>Enhancement of the research skills of the human capital and easier access of businesses to them</p> <p>Research and innovation for Smart accommodations</p> |

Source: RIS 3 Crete 2014-2020 Document in English translation

The initiative is supported by a number of responsible stakeholders. These are the Prefecture of Crete, the department of development planning and the ERDF Managing authority, as well as working groups, the innovation platform support and the calls management.

The funding for the cultural-touristic was foreseen to come from the ERDF Regional Operational Programme of Crete, contributing with EUR 30 million, from the Greek Operational programme entrepreneurship, competitiveness and innovation 2014-2020 (ERDF and ESF), contributing with EUR 20.5 million and from Horizon 2020, contributing with EUR 5 million. Although tourism is an important sector for the region's development the dedicated funding is still the lowest of the four complexes in the RIS3 strategy.

Tourism is inextricably connected with the priorities linked to the economic development of Crete. Therefore, it was a logical step that it was selected as one of the pillars of its Regional Innovation Strategy. However, innovation in tourism is still a young discipline for public innovation policy.

Infusing innovation and technology into the tourism sector aimed to revitalise the value chain and make the region more competitive in the global market, also through attracting a better tourism mix. There are five key levels in focus, namely the upgrading of entry points to the island, through the construction of a new airport, the upgrading of the tourist accommodation facilities and hotel service, through technological solutions provided by ICTs and mobile applications, the expansion of the value chain through the integration of new activities and services exploiting synergies with other complexes of the S3, the diversification of the tourism product and improvement of the marketing practices, through e.g. the development of an all-inclusive virtual platform as well as virtual guidance.⁸⁵

Within the S3 framework, innovation and research for tourism has become a priority for the Cretan stakeholders and public administration over the last 7 years. Several innovation projects have been funded under the Regional Operational Programme (ERDF) or under other EU schemes such as INTERREG or the Intelligent Energy Europe Programme. In many areas, Crete has been a pioneer in innovative solutions in the tourism sector and more specifically in contributing to more sustainable tourism through innovation. Below some examples are presented.

Energy efficiency in tourism

Taking into account that buildings consume 40% of the total energy and emit 36% of GHG, the European initiative 'neZEH', i.e. nearly Zero Energy Hotels aimed to accelerate

⁸⁵ Regional innovation strategy RIS3 2014-2020, Crete.

large scale renovations of existing hotels by providing technical advices to hoteliers, demonstrating flagship projects in the hospitality sector and undertaking training and capacity building activities. The initiative run between 2013-2016, co-funded by the Intelligent Energy Europe Programme. Three hotels in Greece participated in the initiative. The key benefits of such an initiative are first the energy benefits, namely, reducing costs and improving energy efficiency, while it also contributes to the hotels' branding and visibility, reducing its carbon footprint and increasing the guests' experience.⁸⁶

Another example is the restoration of a 300 year old settlement comprised of 10 stone houses to a unique eco-village, called Aspros Potamos. The settlement uses only renewable energy resources, with photovoltaics covering largely the energy needs of the houses.⁸⁷

Online information on Cretan beaches

'Cretan beaches' is an online app that located swimming spots based on the proximity of the user, including historical data, other information, tips in four different languages.⁸⁸

BIOARAMA – new tourist experience

Bioaroma is an eco-friendly, sustainable business headquartered in Agios Nikolaos, Crete. Bioaroma has developed 100% natural herbal cosmetics based on research and archaeological finds that have been passed down from generation to generation. The natural raw materials and organic treasures of the Cretan soil include olive oil, beeswax, sage, dittany, labdanum gum to name a few. These ingredients have inspired a range of products which offer a holistic approach to overall wellness. Bioaroma organizes visitors tour in the area of the company. Bioaroma has become a tourist attraction in Agios Nikolaos. Plenty of tours and experiential tourism packages in its distillery, preparation laboratory, the small folk museum and botanical garden. The digital marketing tools of Bioaroma, the online-shop and the B2B Bioaroma Business Application is aligned with the needs of the international market of the Digital Age. It has been awarded with the 1st position in NOC SWEDEN ORGANIC BEAUTY AWARDS 2017, for the category OF BEST NOURISHING BODY PRODUCT⁸⁹.

Interreg BRANDTOUR project

An Action Plan for the Region of Crete was developed in the framework of the "Building Regional Actions for New Developments in Tourism – BRANDTour" project of the Interreg Europe programme (2014-2020). The action plan was presented in 2020 and proposed three actions. The proposed actions in this Action Plan are the following: Action 1: Creation of a Tourism cluster policy in Crete, Action 2: Exhibition for tourism innovation in Crete, Action 3: Public-Private cooperation in traditional building of Crete. Each action was presented regarding its relevance to the project, the nature of the action, the stakeholders involved for the success of the action, its timeframe, indicative costs and funding sources. Implementation of the actions was delayed because of the COVID-19 pandemic⁹⁰.

Crete as sustainable food destination

The project on sustainable food production and consumption for tourists in Crete, launched by Futouris and the TUI Care Foundation in July 2017, was successfully completed after three years. More than 20 local wine labels from seven indigenous

⁸⁶ <http://www.nezeh.eu/home/index.html>

⁸⁷ <https://www.asprospotamos.gr/>

⁸⁸ <https://www.cretanbeaches.com/en/>

⁸⁹ <https://www.interregeurope.eu/policylearning/good-practices/item/3577/bioaroma-natural-products/>

⁹⁰ <https://www.interregeurope.eu/%20brandtour/>

Cretan grape varieties were developed - two of which have been certified as organic - as well as five olive oil labels which were promoted in numerous food-tasting events and two exclusive excursions. Funded by TUI Care Foundation and Futouris, together with the local partners Local Food Experts and the environmental consultants BlueContec, local farmers were brought to a better understanding of sustainable management methods and connected with local tourism professionals. The link will be used to identify and exploit synergies between food producers and holiday makers. Sustainable food production and sustainable tourism services are the pillars of a sustainable regional development of the island. In the long term, an improvement in food quality and quantity is to be achieved, the negative environmental impacts of agriculture are reduced as well as the local economy is strengthened. In addition to the sustainable production of wine and olive oil, sustainable agricultural products are to be added in the long term. The holidaymakers also benefit from a larger regional food offer and more intense taste. In order to enable guests to visit local production sites and exchange with wine and olive growers, an innovative and interactive excursion program is being developed. Awareness and communication measures accompany the project⁹¹.

The project was based on the pilot project "Sustainable Viticulture" carried out in 2016, in which 47 local farmers have already been brought to a sustainable cultivation practice and to organize wine events in selected hotels.

Linking innovation with tourism in the region is primarily connected to improving the tourism product of Crete, however, at the same time it is also connected to two the larger challenges. On the one hand it is connected to innovation and competitiveness the digital agenda for Europe and all its linked themes. More specifically, linked to innovation and digitalisation in general, spilling over the need for more skills of employees as well as the need for SMEs to get more competitive in the future. On the other hand, it is also in a way linked towards more sustainable tourism, as some of the initiatives are linked to using innovation for more environmental practices, even if not linked directly to the S3.

A key outcome of the S3 in combination with tourism has been the design of a number of dedicated projects to S3, funded with EU funds through the Crete regional operational programme. Another outcome has been the bridging of the quadruple helix and developing a common communication language to understand each other's needs and potentials.

In the long run, such this link of innovation with the tourism product may transform the region into a more resilient region which can adapt to the changes that the future demands. Crete's S3 is currently being updated through a public consultation, where technological trends and innovation play an important role. At the same time, pillars like agro-food and tourism are still among the key priorities of the region remaining high on the agenda.

4.10.3 Larger Context

The European Commission introduced the S3 concept in the EU Cohesion Policy 2014-2020 as an 'ex-ante conditionality' for European regions to obtain funding for research and innovation from the European Regional Development Fund (ERDF). Smart Specialisation strategy (S3) is a place-based innovation policy concept to support regional prioritisation in innovative sectors, fields or technologies through the 'entrepreneurial discovery process (EDP)', a bottom-up approach to reveal what a region does best in terms of its scientific and technological endowments.⁹²

⁹¹ <https://www.futouris.org/en/projects/crete-first-steps-towards-a-sustainable-food-destination/>

⁹² Morisson, A. & Pattinson, M. (2020). Smart Specialisation Strategy (S3). A Policy Brief from the Policy Learning Platform on Research and innovation. Lille: Interreg Europe Policy Learning Platform. https://www.interregeurope.eu/fileadmin/user_upload/plp_uploads/policy_briefs/Smart_Specialisation_Strategy_S3_-_Policy_Brief.pdf

The Joint Research Centre Seville S3 Platform is the European Commission's science and knowledge service on Smart Specialisation Strategy (S3). It provides advice to EU countries and regions for the design and implementation of their S3. The **S3 Platform**⁹³ provides guidance material and good practice examples, informs strategy formation and policymaking, and provides a combination of mapping tools that allow users to identify regions' economic domains of specialisation and aims at facilitating interregional cooperation and the creation of partnerships among various actors throughout Europe. Among the thematic partnerships there is one dedicated to "Digitalisation and Safety of Tourism"⁹⁴. Crete is one of the regions participating in this partnership.

4.10.4 Lessons learned

The process towards the Regional Innovation Strategy was initiated back in 2013 to be then approved and in place in 2016. The strategic framework has been important to make the efforts for innovating products, processes, marketing and organisational structures in the tourism ecosystem of Crete. However, the first years have been important to building up the S3 governance and to bring stakeholders together in a regional platform and in local networks. The first S3 strategy has shown that innovation in tourism needs a different approach to innovation. The complexity of the tourism ecosystem and the important role of players outside the region (tour operators, flight companies, travel sellers) make it difficult to promote radical innovation or new models like, for example, sustainable tourism.

In 2021, an update of the RIS3 has started with a public consultation. The results of the public consultation are not yet publicly available, however, innovation and particularly technological trends such as Internet of Things, Artificial Intelligence, sustainable development and data analysis for decision making seem to be priorities. In addition, skills and training remain important elements.

A key success factor of the RIS is that it managed to bridge the different players in the region, particularly the research and university sector with the business sector. This is a first steps towards more solid basis in the future and for developing innovation for the tourism and other sectors on Crete and not being dependent on using already tested and implemented methods from abroad.

Given that Crete is home to a number of universities and research centres and taking into account the steps taken through the RIS3 to bridge the quadruple helix, there can be a starting point for more regional innovation.

4.10.5 Conclusion

Regional Innovation Strategies help in lifting the regional innovative advantages and economic potential and build on comparative advantages. Applying this regional innovation approach to the tourism ecosystem offers clear opportunities for regions with a dominant tourism sector, but also advantages for other regions – given the important multiplier role of tourism for the regional economy, bringing benefits to other sector such as transport, retail, food and beverages, entertainment and cultural-creative industries.

The region of Crete has for years been a destination promoting 'sea and sun'. The last years it has been doing some efforts to diversify its tourism product, offer more tailor-made approaches and tourism products and also expand its touristic period beyond the summer months. The S3 strategy has helped towards this direction in basically changing the mindset of people towards thinking in a more innovative way and considering innovation in their planning.

⁹³ <https://s3platform.jrc.ec.europa.eu/en/what-we-do>

⁹⁴ <https://s3platform.jrc.ec.europa.eu/en/digitalisation-and-safety-for-tourism>

As the current RIS3 is being updated, the next programming period shall also fit in that respect. Given that the funding will also be aligned for the projects under the S3, future priority axes will fit in the priorities of the S3.

A recent analysis of tourism innovation and S3 smart specialisation strategies in Spain concluded that “the measures proposed for the promotion of innovation in the tourism sector on the basis of the S3 sometimes do not fully exploit the synergies and potential that the economic and scientific-technological capacities described in the Strategies reveal at regional level, but above all at inter-regional level. [...] The strong transversality of the tourism sector allows for the incorporation of complementary technologies in line with the growing needs of the market. e.g. from areas such as ICTs, environment, health, design, design environment, health, design, agro-industry, infrastructures, etc.”⁹⁵.

⁹⁵ Fundación COTEC (2021): Innovación Turística y Especialización Inteligente en España. Palancas Imprescindibles para la Recuperación. Study by COTEC, SEGITTUR and INFYDE.

5 Annex B: List of Interviews and written information collection carried out for the case study research

| Organisation | Date |
|---|-----------------------------------|
| Turismo de Portugal | 17 May 2021 |
| TIRME - Parc de Technologies Ambientals de Mallorca (Spain) | 25 May 2021 |
| TIRME - Parc de Technologies Ambientals de Mallorca (Spain) | 21 May 2021 (written response) |
| Tourismusverband Dachstein Salzkammergut | 26 May 2021 |
| Tourismusverband Dachstein Salzkammergut | 26 May 2021 |
| Nordeifel Tourismus GmbH | 28 May 2021 (written response) |
| ADT - Alsace tourism destination management organisation | 2 June 2021 |
| Fáilte Ireland | 5 May 2021 |
| Port of Tallinn | 28 May 2021 |
| Port of Tallinn | 28 May 2021 |
| Region of Crete | 22 June 2021 |
| Region of Crete | 12 July 2021 |

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