

needs under a sustainability spectrum

ACTIVITY T1.1 - The tourism culture of ADRION;
 EU, ADRION and National/Local strategies

DELIVERABLE T1.1.1
The SUSTOURISMO context

**ANALYSIS OF POLICY DOCUMENTS ON SUSTAINABLE
 TOURISM AND TRANSPORT IN THE ADRION AREA**

<p>DELIVERABLE T1.1.1 The SUSTOURISMO context. Analysis of policy documents on sustainable tourism and transport in the ADRION area.</p>	<p>FINAL VERSION 30/12/2020</p>
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1. Sustainable tourism and mobility: an introduction

1.1 Sustainable tourism: some key aspects

“Tourist is anyone who travels to places other than the one in which is his habitual residence, outside of their everyday environment, for a period of at least one night but not more than one year and whose usual purpose is different from the exercise of any remunerated activity in the place to which he goes.”

Sustainable tourism is defined by the UNWTO as "tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities". Sustainable tourism is not any specific kind of tourism, but rather a pathway that any form of tourism should follow in order to be compatible with the principles of a sustainable development. Therefore, a sustainable tourism can be developed through guidelines and management practices aimed at improving sustainability and that are applicable to all forms of tourism in all types of destinations. Sustainable tourism should not be confused with different concepts such as slow tourism or slow travel, ecotourism, or responsible tourism.

If we analyse the key dimensions of sustainable tourism, we see that mobility is only one among the others. There are indeed three dimensions of sustainability: environmental, economic, social. The World Tourism Organization defines sustainable tourism as “tourism which leads to management of all resources in such a way that economic, social and aesthetic needs can be filled while maintaining cultural integrity, essential ecological processes, biological diversity and life support systems.”



Various sustainable tourism indicator frameworks have been set up in order to guide a development of sustainable tourism and foster the adoption of universal sustainable tourism principles, two of which are particularly relevant: the Global Sustainable Tourism Council (GSTC) and the European Tourism Indicators System (ETIS) for Sustainable Management at Destination Level.

1.2 Sustainable mobility for tourists: synthesis of the key aspects

Analysis of the key dimensions of the sustainable mobility for tourists (Intermodality, real time information on public transport, multi languages information and communication materials, innovative sustainable transport solutions, integrated ticketing, App, MaaS, etc.).

<http://tourism4sdgs.org/>



	Enterprises		Turnover		Value added at factor cost		Persons employed	
	Number	%	Million €	%	Million €	%	Number	%
Total tourism industries	2,225,810	100%	925,741	100%	339,469	100%	11,989,000	100%
Transport related	343,288	15.4%	247,813	26.8%	86,927	25.6%	1,997,000	16.7%
Accommodation	267,358	12.0%	149,359	16.1%	69,187	20.4%	2,373,600	19.8%
Food and beverage	1,472,790	66.2%	301,648	32.6%	121,155	35.7%	6,933,700	57.8%
Car & other rental	48,324	2.2%	68,922	7.4%	35,400	10.4%	184,700	1.5%
Travel agencies, tour operators & related	94,052	4.2%	158,619	17.1%	26,800	7.9%	500,000	4.2%

1.3 Target Users: Touristic and Mobility needs

Tourists have particular needs both in terms of mobility and touristic services provision. This paragraph intends to map all these needs, based on the main scientific literature.

Depending on the specific location, target users may be very different. We may indeed cluster the target users in relation to each possible “type” of tourism:

- Tourism connected with the seasonality (peak moments). For example:
 - Seaside tourism (cruise tourism, beach tourism, etc.)
 - Mountains (skiing, trekking, etc.)
- Main art cities (Venice, Florence, Rome, etc.)
- Food and wine tourism
- Wellness tourism
- Weekend tourism

Each target group has specific touristic and mobility needs. For example:

- Cruise tourism: tourists look for organized tours in the cities they visit. These types of tourists normally prefer to have everything organized for them. In this case a MaaS offer, for instance, is not adequate to fit the target group needs.
- Art cities: target groups have different mobility needs. When it comes to art cities, MaaS offer can be a good solution, ticketing integration, price reductions in museums and restaurants, etc. for people with a public transport ticket, etc.
- Mountains tourism/ski tourism: tourists who go on the mountains for skiing have very similar needs. A MaaS offer may be convenient, as it may cover the bus/drive to the facilities, offering discounts for the ski pass, equipment rental or at restaurants and retreats.
- Alternative forms of tourism (work travels, etc.).

Eventually, other aspects to consider are:

- Geography (domestic and international tourism);
- Motivation (holiday, business tourism, visiting friends and relatives).

Concerning the tourist motivations, recent publications¹ highlighted how these are essentially the “push-and-pull” factors associated with travel and a destination. Traditional models have defined push motives as the desire to go on vacation in comparison to the pull motives explaining the choice of destination. These “push-and-pull” factors are made up of internal, psychological and external, situational motivations.

Tourists are pushed by their emotional needs and pulled by emotional benefits, emotional and experiential needs are satisfied by seeking pleasure through making choices and altering behaviour, directing attention to desirable feelings and leisurely experiences. Generally speaking, motivations happen when an individual

¹ Mantero C., “Sustainable, smart and safe mobility at the core of sustainable tourism in 6 European islands”, CIVITAS DESTINATIONS Project, Funchal, 2020.

feels the urge to satisfy a want/ need, the goal of the action causes the motivation to achieve a mood elevating good feeling.

Historically, holidays and tourism are a phenomenon that evolved in conjunction with cultural development creating vacations of purpose, the Western World cultivated this concept and restructured it to become stress relievers, and they also have aspects of personal development and self-realization. This new decision-making process eliminates the basic questions that have already been solved, instead of choosing between whether to travel or not, the main concern is now placed on how, when and how to travel, given the necessary parameters of opportunity, time and money. This decision-making process was tabulated by Krippendorf (1987).

Change is a regular occurrence in the tourism industry, competition of products and destination changes the rate of holiday experience. Tourists have established habits when looking to travel and when on holiday, their perception differs to somebody who could be travelling for different reasons. Tourists once had limited knowledge of the destinations that they had previously not travelled to. With the ever-increasing update in technology many tourists are able to find out about their holiday activities and see much more than photos before they arrive, this is comparatively different when discussed alongside the biggest development that happened in tourism in post-World War II times

A motive is a lasting disposition, where each motive is structured to form behavioral goals. The contents referred to according to Heckhausen (1989) are made up of learned behaviors, as the goals make reference to the consequences of one's particular actions. This collective term processes the effects within common parameters within particular situations. Each individual has certain behaviors with expected results. There is a clear distinction between motives and motivations; motives are the energy that creates people to act, whereas motivations allow these motives to be expressed.

People develop different characteristics and habits that contribute to their individualism, particularly the ability to react differently according to the external stimuli. This is best described by Murray (1938) "In other words, what an organism knows or believes is, in some measure, a product of formerly encountered situations. Thus, much of what is now inside the organism was once outside" Murray presents different perspectives on the situation, which helps us to understand the determination of ones disposition.

2. Strategical, political and legislative frameworks for sustainable tourism promotion at EU and ADRION levels

This paragraph intends to provide a synthetic overview of the main EU policies and strategies related to sustainable tourism promotion, specifically at the ADRION level. A specific focus is dedicated to the existing links between sustainable tourism and sustainable mobility.

2.1 EU sustainable tourism Legislative Framework

General overview

<https://www.europarl.europa.eu/factsheets/en/sheet/126/tourism>

- Communication from the Commission to the Council, the European Parliament, the European economic and social Committee and the Committee of the Regions. “Basic orientations for the sustainability of European tourism”, 2003.

<https://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2003:0716:FIN:en:PDF>

- Communications from the Commission. “Agenda for a sustainable and competitive European tourism”, 2007.

<https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52007DC0621>

- Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions - Europe, the world's No 1 tourist destination – a new political framework for tourism in Europe, 2010.

<https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52010DC0352>

- Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the regions “A European Strategy for more Growth and Jobs in Coastal and Maritime Tourism”, 2014.

<https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52014DC0086>

2.2 EU cross-sectorial policies and action plans relevant for sustainable tourism and sustainable mobility promotion - Transport, tourism, sustainability and growth

Tourism and transport are indeed closely related sectors - the terms are often used interchangeably in tourism literature as supported by M.R. Dileep in its book 'Tourism, Transport and Travel Management' [1], of course without meaning that the one term can substitute the other but in a way to show that tourism cannot be treated in absence of transport.

Beginning even from the definition of tourism, the displacement from one place to another, therefore the part of transfer, is undeniable necessary [2]; according to the World Tourism Organization (UNWTO/OMT), tourism "is a social, cultural and economic phenomenon, which entails the movement of people to countries or places outside their usual environment for personal or business/professional purposes. These people are called visitors (which may be either tourists or excursionists; residents or non-residents) and tourism has to do with their activities, some of which imply tourism expenditure".

Tourism is inherently linked to mobility of people and their need to explore areas therefore moving and experiencing areas – being tourism & transport a real complex system [3]. Accessibility of tourist destinations is from the other side necessary for attracting tourists and boosting local economies benefits arising from tourism industry. It is also argued that a deeper insight on tourism sector must begin from the close connection with public authorities (government, local authorities, transport engineers, research, academia, and sectoral agencies) which are the facilitators or the key responsible for (sustainable) transport policy and planning and with transport providers, which are the core parts of the operational side of transportation [4].

For EU, both transport is of pivotal importance while tourism seems as an enabler for growth– upon the first EU is built and upon both its future and competitiveness highly depend; The transport industry directly employs around 10 million people and accounts for about 5% of gross domestic product (GDP) [5] while tourism sector contributes with 10.3% of GDP and 11.7% of total employment, which equates to 27.3 million workers [6].

Furthermore, EU, committed to diving into a transition era and achieving sustainability objectives (including the development of transport and tourism) has invest much in publishing relevant documents and guidelines covering both sectors and also pointing the notion and importance of integration and holistic approach [2]; integrated policies, multi-sector stakeholders dialogue, local communities involvement and awareness raising of citizens and tourists in shifting to sustainable ways of travelling. Among top priorities, environmental protection is included; 'Addressing the impact of tourism transport' by reducing CO2 emissions generated by tourist mobility in Europe (Tourism Sustainability Group final report 'action for more sustainable European tourism') is a real need [7]. Massive tourism affects also natural resources, causes destruction of biodiversity including noise pollution and poses big pressure to networks (infrastructure and services) therefore sustainability challenge and vision becomes even more imperative [9].

Even though transport and tourism policy are responsibilities of different Directorates in EU – transport belongs to DG MOVE and tourism in DG Internal Market, Industry, Entrepreneurship & SMEs (Tourism Unit) – cooperation and integration is well encouraged (i.e. projects as Concertour "CONCERTED INNOVATIVE APPROACHES, STRATEGIES, SOLUTIONS AND SERVICES IMPROVING MOBILITY AND EUROPEAN TOURISM" have added in the improvement of such cooperation).

Today, more than even probably, fighting against COVID-19 pandemic, tourism and transport is much more officially jointly treated; on May 2020 the EU Commission presented *a package of guidelines and recommendations to help Member States gradually lift travel restrictions and allow tourism businesses to reopen, after months of lockdown, while respecting necessary health precautions* [8].

It is really interesting that tourism's 'brother' sector, thus transport, and bodies representing it and dealing with the sustainable growth arising from sustainable mobility - are strongly supporting Rail Renaissance for transnational connectivity through initiatives led by stakeholders' cooperation.

Taking into account also the post COVID-19 effect, the White Paper on Rail Transport for International Tourism in Europe defines sustainable growth models that accelerate the transformation to a sustainable, digital and innovative tourism sector; *i)Strong political and financial support to promote the benefits of rail travel for leisure purposes among travellers from Europe and overseas, through dedicated educational and promotional campaigns, ii)Promote and support sector-wide initiatives lead by railways and national tourism boards to engage all relevant actors across the industry and secure support for joint action, iii) Commitment to invest and support railways to enable carriers provide quality transport services that meet the specific needs of leisure travellers at an adequate price that leaves no one behind and iv)Promote smart mobility models with railways as integrators for a seamless, sustainable, affordable and accessible mobility for residents and visitors alike [11,12].*

The issue of cross-sectoral cooperation at all levels, top down, initiated by EU and bottom up from local best practices transferring, between public entities, local communities, academia and industry should be further enhanced and conflicts resolution should take place for mutually supporting growth, wellbeing and sectors' viability. Coordination between the different skills, instead, would bring bold ideas and add in the creation of an integrated tourism and transport system [2] i.e. integrated cards for touristic cities combining Public Transport tickets and discounts on points of interest, improving the connectivity and accessibility among transport hubs and touristic sites and accommodation locations, offering integrated transport and touristic information upgrading both city's (touristic and overall) profile while also attracting more users in sustainable ways of transport.

EU further recognizing the role of sustainable tourism and its connection to sustainable transport and wanting to push cities take actions, has launched awards – the COMPENDIUM OF BEST PRACTICES '2019 European Capital of Smart Tourism competition' present significant steps taken by EU candidate cities for Smart Tourism Awards. Sustainability, Digitalization, Cultural Heritage & Creativity and Accessibility are the four categories of innovative and intelligent solutions that have been showcased. Among them; Whim app as a one-stop-shop information and ticketing app for all modes (whimapp.com), smart integrated cards offering discounts in Public Transport and at other points of interest, services tailored to people facing mobility problems, personal volunteers – helpers offering personalized information to tourists, pedestrianization and cycling routes extension and rewarding systems for responsible behaviours [11,10].

The adjective sustainable has been added in both transport and tourism sectors highlighting the relevance to long-term development respecting economic, environmental and social aspects guaranteeing seamless and equal access to products and services for all. Therefore, the link of both sectors to environmental and energy efficiency policies is more than strong. Furthermore, being such crucial parameters for economic growth, policy on tourism and transport is closely related to EU policy on entrepreneurship and employment.

The remainder of this chapter refers to main EU docs and guidelines linking the two sectors, tourism and transport and also to their connection with policies on other sectors. These are:

2.2.1 EU transport related policy

Transport White Papers, 2001 & 2011

Following, and in line with the Treaty of Amsterdam (which introduced sustainable development as an objective for the Community) and the Gothenburg European Council (which agreed on a strategy for

sustainable development), the EU published the White paper 2001 – ‘European transport policy for 2010: time to decide’ [18]. In this paper, the EC proposes some 60 measures aimed at developing a European transport system capable of modal shift towards friendlier modes of transport than private car, revitalising railways, promoting sea and inland waterways-based transport and controlling air transport growth. The starting point of the 2001 White Paper on Transport Policy is that a modern transport system must be sustainable from an economic and social as well as from an environmental viewpoint. Reference to tourism sector is made in the document with link to Galileo that can bring a revolution to transport and tourism just as in the way liberation of air transport did.

Further to this direct, the link although not much referred exists in the way transport and tourism is connected as described in the introductory part of this chapter i.e. Interoperability is mentioned as major criterion in selecting and evaluating projects for trans-European network which connects effectively Member States therefore facilitates transnational trips and tourism.

Ten years after the ‘European transport policy for 2010: time to decide’ White Paper, the Commission adopted a new Transport White Paper, which defines its transport policy agenda for the next decade. In the ‘Roadmap to a Single European Transport Area - Towards a competitive and resource efficient transport system’, White Paper 2011 [19], the EC adopted a roadmap of *40 concrete initiatives for the next decade to build a competitive transport system that will increase mobility, remove major barriers in key areas and fuel growth and employment. At the same time, the proposals will dramatically reduce Europe's dependence on imported oil and cut carbon emissions in transport by 60% by 2050 (ec.europa.eu)*. As major emission contributor, urban transport greening holds a central position in the goals list.

Although the White Paper does not have either a reference to the word “tourism” the actual benefits of the achievement of the transport goals in tourism will be tangible: i.e. from a regulatory framework for innovative transport, tourists will benefit – single tickets, seamless connectivity, integrated information and one-stop-shops will support travellers identify the optimal combination of modes for their trips.

Green Paper “Towards a new culture for urban mobility”, COM/2007/0551 final

The Green Paper “Towards a new culture for urban mobility” published in 2007 [21] agreed on the necessity to join actions and forces towards achieving the goal of free-flowing and greener cities. With the Green Paper, the Commission set a new European agenda for urban mobility, respecting local, regional and national authorities’ responsibilities and trying to reinforce citizens and stakeholder’s engagement in the common target of successful urban mobility management.

The launching of the new era of accessible, safe and secure urban transport was planned in parallel with the identification of the obstacles hindering successful urban mobility and of ways to overcome problems. Issues as the improved quality of collective transport, clean and energy efficient technologies, support of walking and cycling and respect of passengers’ rights on public transport were among the core discussion subjects of the Green Paper. In the Green Paper is mentioned that “According to stakeholders, tourists are a specific group of transport users with their own requirements, both in terms of size and patterns, which can put specific pressures on urban transport systems. This should be kept in mind when one looks at accessibility inside the urban area, and also at access to this area from outside” – therefore all the accessibility facilitation aspects mentioned in the paper reflects also upon tourism sector.

Urban Mobility Package, COM(2013) 913 final

In December 2013, via the Urban Mobility Package [17], the Commission reinforces its supporting measures in the area of urban transport by:

- Sharing experiences, show-casing best practices, and fostering cooperation.

- Consolidation and dissemination of experiences and best practices (studies, web portals): Urban Mobility Portal (Eltis); Platform on Sustainable Urban Mobility Plans; Member States Expert Group.
- Providing targeted financial support, i.e. Structural funds, ESI-Funds, TEN-T.
- Focusing research and innovation on delivering solutions for urban mobility challenges i.e. CIVITAS Initiative (2002), Smart Cities and Communities, Clean Vehicles Initiative.
- Involving the Member States and enhance international cooperation.

The central element of the Urban Mobility Package is the communication ‘Together towards competitive and resource efficient urban mobility’ that aims at providing the basis for a continuous debate on urban mobility at EU and member states levels. With this document, the EU prepares the ground for building innovative concrete solutions in urban mobility aiming at reinforcing the resource – efficiency and competitive character of urban mobility. Tourism is not mentioned in the document however considering the city break type of tourism that is getting increasing attraction from travellers, measures within cities, taking into account also tourism flows, are estimated alleviate the pressure to the infrastructures and services and mutually support tourism growth and areas’ sustainability.

Air transport – From the single European sky (SES) in 1999 to the Communication ‘Reducing the Climate Change Impact of Aviation’ [COM (2005) 459] & the global scheme for a Resolution for a global market-based measure to address CO2 emissions from international aviation

According to *Bieger & Wittmer* (2006) the interrelationship between airlines and tourist destinations is really obvious; advertising initiatives and involvement in planning of airport – catchment area accessibility is taking place from airlines in some cases while local authorities invest in attracting airlines [20]. Sustainability of tourism sector is linked therefore to aviation impact. Being aviation one of the fastest-growing emitters, the EU is making great efforts to reduce aviation emissions which is obvious from the wide list of regulations and policy documents on the issue.

The single European sky (SES) initiative is met for the first time at 1999 with the aim to improve air traffic management and air navigation services through the stronger integration of European airspace. The completion target for SES is posed around 2030-2035 and was estimated to be able of tripling airspace capacity, halving the costs of management, improving safety levels by ten times and reducing aviation environmental impact by 10%. These goals are strictly linked to sustainable tourism goal achievement since air transport is a major facilitator of tourism industry.

The SES legislative framework consists of four Basic Regulations (N° 549/2004, 550/2004, 551/2004 and 552/2004) covering the provision of air navigation services (ANS), the organisation and use of airspace and the interoperability of the European Air Traffic Management Network (EATMN). The four pillars of the integrated approach of SES are the performance-based regulatory framework, the safety pillar, the technological contribution, the human factor and the optimisation of airport infrastructure.

Following, in 2005, the Commission published the COM entitled ‘Reducing the Climate Change Impact of Aviation’ [COM (2005) 459] where the inclusion of the climate impact of the aviation sector in the EU emissions trading scheme. In the public consultation on Reducing the Climate Change Impact of Aviation the link to air travellers to tourism purpose is more than clear therefore actions in the aviation sector contributes in the sustainability of the tourism one.

Considering the link between the two sectors, we should at this point refer also to the Resolution for a global market-based measure to address CO2 emissions from international aviation as of 2021 that was agreed in October 2016 by the International Civil Aviation Organization (ICAO). Based on this global level action, the Carbon Offsetting and Reduction Scheme for International Aviation, or else CORSIA, aims to

stabilise CO2 emissions at 2020 levels by requiring airlines to offset the growth of their emissions after 2020 (mobilizing intense monitoring procedures, using of renewable energy etc.) [23].

POST-COVID era: ‘Tourism and transport: Commission's guidance on how to safely resume travel and reboot Europe's tourism in 2020 and beyond’

Facing this very difficult moment caused by COVID-19 pandemic, EU is striving to open the path for getting again into a normality path, more secure and safe now while supporting sustainability. In May, 2020 the Commission presented a package of guidelines and recommendations to help its Member States safely go from travel restrictions to the reopening after the lockdown of tourism businesses lockdown. The link of transport and tourism is more than ever highlighted while also their liaison to economy and social dimensions (business, entrepreneurship, employment) is unquestionable.

Commission's Tourism and Transport package includes:

- An overall strategy towards recovery in 2020 and beyond;
- A common approach to restoring free movement and lifting restrictions at EU internal borders in a gradual and coordinated way;
- A framework to support the gradual re-establishment of transport whilst ensuring the safety of passengers and personnel;
- A recommendation which aims to make travel vouchers an attractive alternative to cash reimbursement for consumers;
- Criteria for restoring tourism activities safely and gradually and for developing health protocols for hospitality establishments such as hotels [8].

2.2.2 EU 2020 Strategy for smart, sustainable and inclusive growth

Responding to the economic and social crisis of Europe and to the intensified global challenges, EU defined the strategy Europe 2020 as a framework for effective decision making with a view to reaching 2020 with having achieved major sustainability goals. Towards accomplishing this path, the EU Member States, having deepened in the strategy philosophy, translated the EU-level targets to national targets taking into account special characteristics and country needs. The five areas that need structural transformation or/and upgrade for achieving high level of competitiveness, productivity and equity (or in other words as the title of the strategy reveals; ‘smart, sustainable and inclusive growth’) in EU and the accompanying targets as defined in EU2020 are:

Area of intervention	Target
Employment	75 % of the population aged 20-64 should be employed
Research & Development	3% of the EU's GDP should be invested in R&D
Climate change & energy	The ‘20/20/20’ climate/energy targets should be met (greenhouse gas emissions/share of renewable energy sources/energy efficiency)
Education	Share of early school leavers should be under 10% and at least 40% of the younger generation should have a tertiary degree
Poverty & social exclusion	20 million less people should be at risk of poverty

EU 2020 intervention areas and targets

In a nutshell, the Flagship Initiatives of the EU 2020 Strategy are:

- Innovation Union
- Youth on the move
- A Digital Agenda for Europe
- Resource efficient Europe
- An industrial policy for the globalization era
- European Platform against Poverty
- An Agenda for new skills and jobs [27]

Coming to transport sector, Intermodal transportation effective and smart management of transport systems and services is seen to be a major intervention area important issue supporting that of the EU 2020 Strategy as it states that each EU Member State needs to establish smart, upgraded and fully interconnected transport and energy infrastructures and make full use of ICT. Taking into account the abovementioned link among transport and tourism, the envisioned goals for the first sector are affecting positively also the tourism sustainability dimension. Furthermore, being part of the Flagship Initiative 'An industrial policy for the globalisation era', the enhancement of the competitiveness of the tourism sector is mentioned as one of the urgent actions to work on.

2.2.4 EU maritime and coastal related policy

An Integrated Maritime Policy for the European Union, COM(2007) 575 final

Europe's maritime spaces and its coasts are central to its wellbeing and prosperity – employment and leisure (tourism) is part of these spaces. The European Commission, acknowledging the relation of Europe with the sea, proposed in 2007 an Integrated Maritime Policy for the European Union, *based on the clear recognition that all matters relating to Europe's oceans and seas are interlinked, and that sea-related policies must develop in a joined-up way if we are to reap the desired results*. The Policy was estimated to enhance Europe's capacity to survive and win from globalisation and increased competitiveness, to fight climate change and degradation of the marine environment, to increase maritime safety and security and to contribute to energy security and sustainability achievement. Maritime and coastal spaces, tourism (it is marked in a characteristic way that tourism depends on attractive and healthy marine environments), employment, competitiveness, transport and sustainability are notions included in the Policy.

Projects of particular importance that were mentioned referred to:

- A European Maritime Transport Space without barriers
- A European Strategy for Marine Research
- National integrated maritime policies to be developed by Member States
- An European network for maritime surveillance
- A Roadmap towards maritime spatial planning by Member States
- A Strategy to mitigate the effects of Climate Change on coastal regions
- Reduction of CO₂ emissions and pollution by shipping
- Elimination of pirate fishing and destructive high seas bottom trawling
- An European network of maritime clusters

- A review of EU labour law exemptions for the shipping and fishing sectors [24]

According to the progress of the EU's Integrated Maritime Policy in 2012 (COM/2012/0491 final */) , the Policy has set the beginnings of a vision for getting real benefits for maritime growth and sustainability in Europe – the contribution of maritime to Europe's economy is high and the next step is to secure this development. Blue Growth is going to be the second phase of the Integrated Maritime Policy for achieving healthy maritime economy [25].

EU Blue Growth strategy, COM (2012) 494 final

Coming as a follow up of the Integrated Maritime Policy, Blue Growth is the long-term strategy to support sustainable growth in the marine and maritime sectors in EU. The strategy consists of three components:

- Develop sectors that have a high potential for sustainable jobs and growth, such as (aquaculture, coastal tourism, marine biotechnology, ocean energy, seabed mining)
- Essential components to provide knowledge, legal certainty and security in the blue economy (marine knowledge, maritime spatial planning, integrated maritime surveillance)
- Sea basin strategies to ensure tailor-made measures and to foster cooperation between countries (Adriatic and Ionian Seas, Arctic Ocean, Atlantic Ocean, Baltic Sea, Black Sea, Mediterranean Sea, North Sea) [26].

Coastal tourism is indeed one of the sectors recognized as of high potential, presenting link to maritime affairs and to sustainability. Official documents related to Blue Growth are:

- Initiative for the sustainable development of the blue economy in the western Mediterranean (19/04/2017)
- Framework for action
- Report on the Blue Growth Strategy: Towards more sustainable growth and jobs in the blue economy (31/03/2017)
- Communication from the Commission: Innovation in the Blue Economy: realising the potential of our seas and oceans for jobs and growth - COM(2014) 254/2 (13/05/2014)
- Marine Knowledge 2020: roadmap accompanying the document
- Communication from the Commission: Blue Growth opportunities for marine and maritime sustainable growth (13.09.2012)

2.2.5 EU environmental related policy

EU Sustainable Development Strategy (SDS) COM/2001/0264 final & ACTION for MORE SUSTAINABLE EUROPEAN TOURISM

In 2001 the Commission published the communication 'A Sustainable Europe for a Better World: A European Union Strategy for Sustainable Development' with an aim to highlight the need for identifying and developing actions improving life quality of life through investment on sustainability of communities and efficient and clever use of resources. In order to achieve the goals, policy coherence, investment in technology, research and innovation and coordinated actions are mentioned. [16].

The EU SDS was renewed in 2006, following a broad public consultation and an in-depth preparatory process with adoption by Heads of State and Governments at the European Council. Policy integration and communities' engagement and involvement are mentioned as well in this document.

In July 2009 the Commission adopted the 2009 Review of EU SDS where EU has mainstreamed sustainable development into a broad range of its policies. In particular, for the cases where unsustainable trends persist in many areas and the efforts need to be intensified [28].

Action for more Sustainable European Tourism

Recognizing the role of sustainability in almost all sectors of everyday life, the Action for MORE SUSTAINABLE EUROPEAN TOURISM comes in 2007 with identifying key challenges and mechanisms for facing them in tourism sector;

Key challenges for the sustainability of European tourism

- Challenge 1: Reducing the seasonality of demand
- Challenge 2: Addressing the impact of tourism transport
- Challenge 3: Improving the quality of tourism jobs
- Challenge 4: Maintaining and enhancing community prosperity and quality of life, in the face of change
- Challenge 5: Minimising resource use and production of waste
- Challenge 6: Conserving and giving value to natural and cultural heritage
- Challenge 7: Making holidays available to all
- Challenge 8: Using tourism as a tool in global sustainable development

Mechanisms for implementation

- Sustainable destinations
- Sustainable businesses
- Responsible tourists

Very interesting is the dimension of tourism personal responsibility in their choices that refer to:

- Choosing more sustainable transport and accommodation options
- Spreading their pattern of holiday taking throughout the year
- Reducing use of energy and water at their destination
- Reducing and recycling material used and leaving no waste
- Minimising intrusion, for example through noise
- Gathering information to improve understanding of destinations visited
- Respecting nature, culture and host communities' values and traditions
- Supporting the local economy, including purchasing local produce
- Contributing to projects to conserve natural and cultural heritage [7].

2.3 Concluding remarks

Tourism seemed to be as a part of the wide arsenal of EU in achieving sustainability goals and not so much as a stand-alone policy until the beginnings of 2000 when the treaties which reformed the European Union were finally implemented [41]. However, even after 2000, tourism lies hidden in other brother sectors; i.e. Transport White Paper 2011 does not have either a reference to the word 'tourism', however given that a big part of international travellers are tourists, the actual benefits of the achievement of the transport goals in tourism strongly exist. Even today, there are voices that support that the tourism – policy making character is not holistic and integrated and that is not dealt as a proper policy that can develop into a

European tourism model, issues that prohibit alignments and cause the observation of non-harmonized procedures i.e. distribution of competences related to tourism within Member States and fragmented actions [41,42]. Further steps seem necessary in order to establish tourism as a strong policy in the EU for achieving Internal Market goals, sustainability and growth targets. Clearer inter-linkages and cross-references of tourism in the related field policies as well as vice versa seem necessary too.

3.2 National policies, strategies and action plans for sustainable tourism and mobility promotion: Greece

3.2.1 Brief introduction. Tourism in Greece

For Greek economy, the tourism sector is one of the most important sectors and a key pillar in the country's economic growth. In 2017, the tourism GDP accounted for 6.8% of total GVA. In 2018, 381 800 people were directly employed in the sector, accounting for 10.0% of total employment in the country. Tourism is an export champion in the Greek economy. Travel exports accounted for 43.3% of total service exports in 2018.

In 2018, inbound tourism to Greece recorded the highest number of 33.1 million international tourist arrivals, an increase of 9.7% comparing to 2017. Two-thirds of total visits were tourists from other EU countries, noting an increase of 15.1% comparing to the previous year. The volume markets of Germany (+18.2%) and France (+7.3%) grew significantly, recording a total of 4.4 million and 1.5 million visits respectively, as did arrivals from the United States reaching 1.1 million visits, (annual growth of 26.9%). Overnight stays in all means of accommodation rose by 8.1% compared with 2017, reaching 230.7 million.

Domestic tourists counted 5.7 million trips in 2018, recording a 3.6% increase in comparison to 2017. Only 4.7% of domestic trips were for business purposes in 2017, with the vast majority being leisure orientated. The majority of domestic visitors stayed with friends or relatives or in other non-rented accommodation, with only 34.2% of visits using paid accommodation. [1].

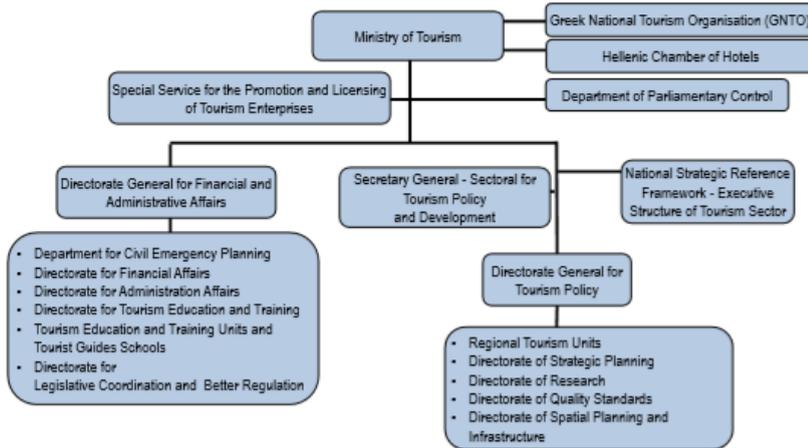
3.2.2 National legislative framework and key actors

The Ministry of Tourism is responsible for tourism policy making and development in Greece. It introduces legislation on tourism, agrees the strategic marketing plan, stimulates investment and works to improve the quality and competitiveness of Greek tourism. The Ministry co-operates closely with other interested ministries and tourism bodies, such as the Association of Greek Tourism Enterprises and the Research Institute for Tourism.

The implementation of the Marketing Strategy is carried out by the Greek National Tourism Organisation (GNTO), which operates a network of 16 offices overseas. The Hellenic Chamber of Hotels is the Government's statutory advisor on tourism, as well as the competent authority responsible for the official classification of hotels, rooms and apartments.

The Ministry of Tourism operates a network of 14 Regional Tourism Offices that licence and inspect tourism businesses, conduct quality control, monitor official classifications and regulate the sector. At the regional and local level, regions and municipalities plan and implement programmes and activities for tourism development and promotion. All promotional activities require the approval of the Greek National Tourism Organisation, to ensure that these campaigns align with the national strategy for tourism promotion.

The total budget for the Ministry of Tourism rose by 6.3% in 2018 to EUR 63.7 million, up from EUR 59.9 million in 2017. Of this, EUR 20.6 million was allocated to support the marketing and promotional activities of the Greek National Tourism Organisation. [1].



Source: OECD, adapted from the Ministry of Tourism, 2020

Organizational chart of tourism body in Greece

3.2.3 National policies and strategies on tourism and sustainable mobility

The Greek key national policies, strategies and actions plans on tourism and sustainable mobility are:

- Hellenic Tourism Organization Strategy - HTO 2019 (Ministry of culture and sports)
- Touristic Strategic Planning – Road map implementation - SETE- Greek Tourism Confederation
- National Development Strategy 2014-2020 in tourism (Draft guidelines)
- National Strategic Plan for Tourism Development 2021-2030
- National Strategic Transport Plan, draft Report, 2019
- National Strategic Reference Framework 2014-2020 (NSRF 2014-2020)
- Tourism Platform of General Secretariat for Research and Technology (GSTR)

Hellenic Tourism Organization (Ministry of culture and sports – HTO Strategy 2019-2020)

According to the Hellenic Tourism Organization (HTO), the promotion strategy to be followed for the year 2019-2020 is described through the following action modules: [2]:

Communication Positioning

Greece must be a leading, attractive and safe island- destination promoting in parallel its diverse inland, by offering authentic thematic tourism experiences 365 days a year, enhancing the traditional ‘sun and sea’ model. Emphasis should be given on displaying unique thematic experiences in all geographical areas of the country, in order to cover all seasons of the year, and to unleash Greece's innumerable opportunities for providing unique and varied experiences to its visitors.

Marketing Objectives

- Increasing tourism's sector contribution to GDP;
- Increase in arrivals (5-10% annually);
- Increasing per capita tourist expenditure of tourists visiting Greece;
- Balanced and sustainable tourism development in mainland and island Greece;
- Extension of the tourist season;
- Development and promotion of thematic tourism throughout the year, in mainland and island Greece;
- Development of integrated and thematic tourism products that will have the character of 'unique experience';

- Targeted strengthening of domestic tourism, aiming to achieve economic stability and growth by highlighting each destination 365 days a year;
- Specialized strategic penetration by target market and opening of new markets;
- Strengthen market shares in mature markets;
- Attracting mega events and tourism conferences;
- Attracting new investments (creating an attractive investment environment);
- Improvement of existing tourist accommodation infrastructure and services through the provision of incentives.

Axes of Marketing Strategy for Tourism 2019-2020:

- Preserving and further enhancement of Greece’s position by upgrading and enriching Greece's main tourism products ‘sun and sea’;
- Empowerment and diversification / Enrichment of classic destinations with authentic thematic experiences aiming to extend the tourist season;
- Emerging of new destinations and their comparative advantages while enhancing strategic connectivity (new flights) and capacity in coordination with decentralized administrations and local entrepreneurship;
- Empowering ‘city breaks’ in Athens and Thessaloniki and highlighting new city break destinations;
- Further support for tourist arrivals in low tourist season through specialized agreements with Tour Operators;
- Opening up of new markets and strengthening of existing mature markets.

The Tourist Product focusing on further development on the below tourism products categories:

- Sun and sea
- City Destination - City Break
- Cultural tourism
- Gastronomic tourism
- Conference tourism
- Health and wellness tourism / medical-therapeutic tourism,
- Sea tourism (cruise, yachting)
- Religious tourism
- Luxury tourism
- Sport-coaching tourism
- Travel Tourism
- Rural Tourism

Some of the above-mentioned actions can be implemented in combination with actions promoting sustainable mobility. Table 3.1 below, depicts these actions giving possible examples of interventions promoting sustainable tourism via sustainable mobility.

Table 3.1: Proposed actions for the tourism promotion by Hellenic Tourism Organization – Strategy 2020 and relevance with sustainable mobility

Action module	Action proposed for the promotion of tourism	Relevant connection of action with sustainable mobility
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	Balanced and sustainable tourism development in mainland and island Greece.	For a sustainable tourism development, main principals of sustainable mobility should be taken into account. Expected touristic flows must be defined in short and medium term horizon, in order the relevant infrastructure and mobility services (e.g. public transport system) to be designed and implemented.
Marketing Objectives	Development and promotion of thematic tourism throughout the year.	Thematic tourism promotion and development of thematic tourism products, as mentioned in previous strategies, should be designed in terms of sustainable mobility (use of alternative transport modes for the completion of thematic touristic trips, development of mobility services and applications for tourists, etc.)
	Development of integrated and thematic tourism products that will have the character of 'unique experience'.	
	Attracting mega events and tourism conferences.	The attraction of mega events, such as conferences, demands beyond the appropriate facilities ensuring, the provision of appropriate collective transport services for the conveners (e.g. upgrade of the existing public transport systems, introduction of new lines, etc., provision of information through relevant mobile application exclusively for conveners, etc)
	Attracting new investments	New investments in the tourism sector do not only refer to accommodation facilities but should also include mobility investments for providing to all visitors alternative options to visit the touristic sights in a more sustainable way.
The Tourist Product	City Destination - City Break	Integrated pedestrian and bicycle networks can be designed and implemented for enhancing alternative tourism trips and reduce the use of private vehicle within the city.
	Conference tourism	Specific mobility services could be designed for the conveners' trips (e.g. DRT services).
	Sea tourism (cruise, yachting)	For cruise and yachting tourists specific mobility services should be developed, for managing the flows arriving at the port and wish to visit the city sights within a few hours

Touristic Strategic Planning – Road map implementation - SETE- Greek Tourism Confederation

According to the Touristic Strategic Design 2021 (Road map implementation) of SETE – Greek Tourism Confederation [3], tourism is expected to be the driving force of Greek economy within the next 8-10 years. As estimated, international visitors will reach 22-24 million with an increase in average expenditure per trip. Total contribution (compared to 2013) in GDP will be 45-48 billion euros (+16 billion euros) and approximately 1 million jobs (+300 thousand).

The main priority for SETE, is to create a strong and diverse product portfolio. Six 'main' products have been designated as well as a number from "complementary and specialized products". For each of the main products a specialized plan has been developed that includes the right strategy market, customer segmentation and infrastructure development and promotion strategy.

The six main products are the basic pillars of the Touristic Strategic Planning and refer to:

- Sun and beach development
- City break development

- Development of Meetings Incentives and Conferences Exhibitions (MICE)
- Development of Cultural Tourism
- Maritime Tourism
- Health Tourism

According to the Touristic Strategic Planning 2021, the above-mentioned products serve specific priorities to be taken into account for the promotion of sustainable tourism.

Table 3.2 below, includes specific priorities that are either linked with sustainable mobility action or can be linked by proposing and implementing relevant actions (possible links with sustainable mobility).

Table 3.2: Touristic Strategic Planning 2021 priorities for tourism link

Main product	Priority	Examples of possible links with sustainable mobility
Sun and beach development	Strategic interventions are proposed to be implemented in the field of infrastructure <i>-The interventions refer to airport staff and services as well as in maritime transport</i>	Beyond the large-scale infrastructure proposed (for airport and maritime transport) the 'Sun and beach development' product can examine the provision of services for tourists arriving/departing at the airport/port that promote sustainable mobility (for example, creation of an info kiosk or development of a mobile app, both providing information regarding the alternative transport options for reaching the final destination of the tourist, based on criteria that promote sustainable mobility).
	Development of 'thematic paths' <i>-Short walks (1-2 hours) in easy-to-reach areas for pedestrians</i> <i>-Routes through selected sights and 'experiences' of the city that have a common theme (e.g. museums, archaeological sites, highways)</i>	The development of short thematic paths is in line with sustainable mobility and a good example of how policies promoting sustainable mobility can be integrated in a general sustainable tourism planning of a region.
Maritime Tourism Development	Enhancing the cruise with additional services provided <i>-Excursions to coastal destinations, such as e.g. urban areas near the ports of departure</i>	The Maritime Tourism Development can be combined with measures and policies promoting sustainable tourism via sustainable mobility. For example, the creation of new marines for large cruise ships could be combined with the development of mobility services or mobility tools/apps promoting the use of alternative transport modes for visiting specific touristic destinations.
	Creation of new one coastal destinations and enhancing existing sea routes in the Eastern Mediterranean and the Aegean Creation of new marines for large cruise ships Development of other destinations as boarding ports for cruise ships - e.g. Thessaloniki (city thematic, religious and tourism)	The development of other destinations as boarding boards should take into account the fact that that all possible provided services for tourists need to be planned and scheduled in terms of sustainable mobility.

National Development Strategy 2014-2020 in tourism

The Ministry's strategic plan for the period 2014-2020 [4] focuses on the following strategic objectives:

1. Change of the traditional model "sun-sea" in parallel with the expansion of the tourist season and increase of the percentage of high-income tourists.
2. Enrichment of the provided touristic product and promotion of new and special tourism forms (Cruise tourism, Conference tourism, City break tourism, etc.).
3. Promotion of the strategic connection with Culture and Environment sectors and touristic development of areas of archaeological and cultural interest
4. Formulation of a friendly investment environment. In contrast to dominant traditional tourist investments, the promotion of more complicated touristic products development will be supported under strict regulatory terms simplifying procedures and operational methods (especially with regard to legislation and taxation).
5. Implementation of strategic touristic infrastructure projects (with an emphasis on infrastructure and multimodal air and sea transport).
6. Promoting human resources, through targeted training of employees and entrepreneurs.
7. Improving the existing tourist dynamic through interventions in existing tourist accommodation infrastructure.
8. Promoting synergies of tourism businesses, at sectoral level and between companies and creating integrated tourism-based networks based on tourist destinations demand.

In the previous programming periods, there was a lack of strategic planning in the tourist sector regarding specific special interventions. As a result, the final financing of the sector could not produce results on a large scale. Consequently, in the new Programming Period, a distinct role is required in planning of such actions and infrastructures, which are necessary in order the country's tourism policy to be flexible in the markets' needs:

- either through a distinct, multidisciplinary, Operational Tourism Development Program, or through a Distinguished Priority Axis for the tourist in the context of other Operational Programs, with the Ministry of Tourism to participate in the actions planning;
- through common planning with the relevant Ministries, of large strategic infrastructure projects essentially crucial for tourism;
- through common planning with Regional Programs of the interventions for local infrastructures' upgrading, local resources utilization, environmental resources protection, and local human resources development. In particular, for the upgrading of the tourist image of urban centers (mainly: Athens and Thessaloniki) in the process of restoring attractiveness and safety and their establishment as tourist destinations "city break", it is necessary to form a special programming tool. Operational Program;
- through special codes for the Tourist sector in priorities included in the Investigative Fund.

Either as a part of a special Operational Program or through Special Priority Axes in other programs, the Tourism Development Strategy 2014-2020 is set up according to the following intervention pillars:

- P1. Important interventions in infrastructure necessary for tourism development;
- P2. Infrastructures for the utilization and parallel protection of "tourist" natural resources;
- P3. Reinforcement actions for business;
- P4. Development actions for human resources;
- P5. Network and infrastructure reinforcement actions for special tourism forms;
- P6. Spatial integration of infrastructure and actions;
- P7. Institutional reformations and actions to strengthen management abilities.

Some of the actions included in the above-mentioned pillars, can be implemented in combination with actions promoting sustainable mobility and are depicted in Table 3.3 below.

Table 3.3: National Development Strategy 2014-2020 in tourism proposed interventions

Intervention pillar	Proposed interventions
1. Important interventions in infrastructure necessary for tourism development.	Significant strategic projects for the tourism sector are included, such as cruise ship ports and intermediate ports in other cities, investments in the utilization of the network of tourist ports in combination with relevant services provision, upgrading of main entrance gates (airports and ports) of the country especially near basic touristic destinations, upgrading of transport hubs such as railways stations, bus stations, etc. At the same time, strengthening research, technological development and innovation in tourism and Business interconnection in Research and Innovation Centers and higher education (Universities), development of networking (clusters) and smart specialization.
2. Infrastructures for the utilization and parallel protection of "tourist" natural resources.	Programs for creating tourist routes within areas of special natural beauty, the program for highlighting destinations and activities related to the environment
5. Network and infrastructure reinforcement actions for special tourism forms.	Actions for the establishment and operation of tourist networks (clustering) aiming to interconnect services and create complete touristic packages. Emphasis will first be placed on specific forms that have already been fully explored, such as: - Marine Tourist: Network and terminal infrastructure in the cruise and tourist ports. Parallel: planning new naval cruise routes in cooperation with relevant bodies of neighbouring states, creating cruise passenger service facilities at coastal ports, the development and improvement of hinterland connectivity networks with existing port and land infrastructure, reception possibility to provide small capacity cruise at marinas with the creation of artificial floating projects, utilization of tourist ports that have remained unfinished, creation of networks of main and satellite tourist ports and Fisheries, redevelopment and redesign of Recreational Recreation Areas, etc.
6. Spatial integration of infrastructure and actions	Actions for the revitalization and regeneration of degraded areas of tourist interest in the withdrawal of old facilities (first in pilot programs and then in their expansion). Targeted infrastructure projects that enhance the competitiveness of tourist destinations by highlighting their important elements, e.g. selected tourist routes, networks of cultural routes, etc.

National Strategic Plan for Tourism Development 2021-2030

The National Strategic Plan for Tourism Development 2021-2030 [5] is currently under development with an ultimate goal to upgrade and further strengthen the competitiveness of the Greek tourism product (holistic approach of the sector).

Key directions include among else:

- Creation of a new legislative framework with immediate implementation of pivotal institutional reforms for the utilization, strengthening and promotion of Special Types of Tourism.
- Foundation of the Destination Management Agency "Santorini".
- Enhancement of Coastal and Maritime Tourism with emphasis on the simplification of the location and licensing of Greek Marinas.
- Strengthening of the institutional framework for the overall upgrading and modernization of vocational education and training on tourism.
- Reference to a regulatory framework involving the short-term rental market in Greece.

National Strategic Transport Plan, Final version, 2019

The **National Strategic Transport Plan** [6], was completed in 2019 and included:

- An Integrated Transport Plan structured in two-time horizons; the mid-term horizon (year 2027) and the long-term horizon (year 2037);
- Support planning tools (traffic model, cost benefit model, online database);
- Management plan and selected capacity building activities (training, institutional support, protocols, data management and collaboration mechanisms with all relevant ministries and agencies) for the creation of a functional Strategic Planning Unit within the Ministry and a fully documented set of activities.

The Strategic Objectives (SOs) were posed in order the transport planning of the country to be linked with its national development strategy dimension. Therefore, five SOs were defined for the transport sector in Greece:

- Economic Growth and Efficiency in the Development and Operation of the Transport System, at Regional and National Level
- Enhancement of Transport Connectivity, including the islands' connectivity with complementary transport modes, interoperability of systems, territorial cohesion and cross-border connection with countries within / outside the EU.
- Ensuring an Environmentally Sustainable Transport Sector
- Providing Accessibility and Social Inclusion in relation to employment, education and social services for the population
- Maintaining Security and Protection of the Transport System.

In parallel with the SOs, eight investment pillars were defined aiming to identify measures and prepare the scenarios of the final Plan. Of these, three are directly linked with the tourism sector development and one indirectly. More specifically:

Pillar 4, refers to the **Tourism Sector Support**, one of the main Greece's economic sectors as it creates a large number of direct and indirect jobs, while in recent years it constantly grows, due to the reduced attractiveness of other destinations in the Mediterranean area. Main objective of this Pillar is the implementation of actions in the transport sector that will expand the tourism supply.

Although the Greek tourism focuses mainly on the summer season and the islands, approaching saturation levels, the observed trends indicate **an extension of the tourist season**, the **development of other types of destinations** and the **development of tourism in the mainland Greece**. Also, the improvement of the economic situation in the country, favours the strengthening of domestic tourism.

For achieving the above, it is necessary to further improve the relevant infrastructure, service level and competitiveness of the transport sector (for all transport modes). As estimated, most of the proposed measures that improve regional connectivity and accessibility (land, sea and air) will have a positive impact on the tourism sector.

Under Pillar 4, measures focusing mostly on tourism supply are proposed (*Table 1*) such as the upgrade, or development of existing railway lines, development of a central waterway network to provide seaplane services to, from and between islands, etc. In addition, the elaboration of a specific Transport-Tourism study is proposed to ensure more coordinated implementation of policy actions and specific transport-related tourism products, such as the development of cultural heritage railways.

Pillar 5, is closely linked to the preceding one, referring to the **Enhancement of Greek islands' connectivity** as the country has more than 150 inhabited islands and the provision of a sufficient level of accessibility both for residents and tourists is a key requirement. Government grants are provided to ensure an acceptable level of connectivity throughout the year, however during the summer the system, faces capacity problems and a low level of service and facilities.

The aim of this pillar is to streamline connectivity with the islands and propose solutions for improving provided services without increasing the state aid. The provision of adequate connectivity enhances not only the general economic development of the islands but also the tourism sector, ensuring an unhindered flow of people and goods. These efforts require quality infrastructure in both the islands and the mainland ports, but also a well-regulated transport system that is affordable and operates on reasonable schedules. In addition, further development of additional connectivity provided by air transport system is under consideration.

Under Pillar 5, measures focusing on Greek islands' connectivity enhancement are proposed such as the development and operation of integrated information systems for the maritime transport, rationalization of ferry and port network and promotion of fleet renewal, adaptation of domestic ferry routes to reduce congestion during the peak periods, preparation and progressive implementation of a port facility improvement program, maintenance and improvement of General Services Financial Interest in the Greek aviation system, by developing synergies between maritime and air unprofitable lines.

Pillar 7, refers to the development of an efficient **Urban and Suburban Public Transport System** in line with the National Transport System. Although urban areas cover only 15% of Greece's geographical area, they represent more than 75% of the total population. However, the accessibility to many intercity buses, port and train stations is inadequate, especially for people with disabilities. Proposed measures to facilitate this access are foreseen in the Plan to increase the use of Public Transport System not only for local commuting but also for longer distances, increasing this way the use of alternative transport modes for both residents and tourists.

Pillar 8, refers to the promotion of **Regional Mobility and Development**, aiming to implement a program of actions to improve transport infrastructure and thus enhance the level of mobility, accessibility and economic development in remote regions of mainland Greece. This pillar, is indirectly linked with the tourism sector as an infrastructure improvement will lead to a better connectivity with specific regions of touristic interest which so far are not popular due to an adequate road network.

The measures proposed in Pillars 4, 5, 7 and 8 are depicted in the following table.

Measures proposed for tourism boost in the National Strategic Transport Plan

Measure Title	Pillar 4	Pillar 5	Pillar 7	Pillar 8
	Tourism Sector Support	Enhancement of Greek islands' connectivity	Development of an efficient Urban and Suburban Public Transport System in line with the National Transport System	Promotion of Regional Mobility and Development
Reconstruction of degraded road network sections	×			×
Upgrade of road axes	×			×
Facilitating border crossing, with major actions 1 - Coordination with neighbouring railways to ensure availability of staff and traction machines 2 - Coordination of border crossing controls with neighbouring countries	×			
Multimodality promotion -Development of an informative platform for transport services -Information provision on land transport services / fees on multimodal online platforms -Preparing bus reform to promote multimodality - Development of intermodal tickets	×		×	×
New rail connections				×
Development of existing rail lines as touristic	×			×
Adaptation of Domestic Ferry Routes for congestion peaks reduce	×	×		
Preparation and progressive implementation of a port facility improvement program for domestic passenger ferry services	×	×		
Preparation and progressive implementation of a port infrastructure upgrade program and modernization of ship service facilities	×	×		
Port relocation - new port facilities in islands' cities where traditional ports are limited by residential expansion		×		
Preparation and progressive implementation of a program for the development of cruise facilities	×			
Development and operation of integrated information systems for maritime sector, with the aim of more effectively monitoring relevant activities, performance and competitiveness		×		
Rationalization of maritime and port network and promotion of fleet modernization	×	×		
Planned airport projects	×	×		
Development of a central waterway network to provide seaplane services to, from and between islands	×	×		
Sustainable Urban Mobility Plan framework			×	

National Strategic Reference Framework 2014-2020 (NSRF 2014-2020)

Greece's development vision for Transport and the Environment, as reflected in the NSRF 2014-2020 [7], prioritizes four actions that:

- a) Contribute to the completion of Trans-European Transport Networks
- b) Enhance regional mobility
- c) Save energy and reduce emissions / development of clean urban transport
- d) Implement Community acquis to protect the environment

Regarding the air transport sector, focus is given on the access of remote areas, for contributing to the country's tourism development by significantly strengthening the island's connectivity. Regarding the urban transportation sector, focus is given on sustainable urban mobility enhancement, environmental protection and promotion of tourism and business / commercial development of Athens and Thessaloniki, which are strategic pillars for tourism (urban tourism, hub for tourist destinations through airports and ports) and entrepreneurship (business attraction, development - support of commercial activities).

The following table depicts thematic goals proposing and relevant selected investment priorities, directly linked to sustainable tourism.

National Strategic Reference Framework 2014-2020 thematic goals and relevant investment priorities linked to sustainable tourism

Selected thematic goal	Selected investment priority	Strategic Objective
06. Preserving and protecting the environment and promoting resource efficiency	6d - Protection and restoration of biodiversity and soil and promotion of ecosystem services, including through the Natura 2000 network, and green infrastructure	<ul style="list-style-type: none"> -Exploitation of environmental, economic and tourism development opportunities. -Promotion of alternative tourism forms. -Update of the national strategy for ecotourism -National strategic plan for the organization and development of Tourism in the Special Zones of Preservation of the network "Nature 2000". Complete ecotourism development programs in National and Regional Parks.
	6iii - Protection and restoration of biodiversity and soil and promotion of ecosystem services, including through the Natura 2000 network, and green infrastructure	<ul style="list-style-type: none"> -Exploitation of environmental, economic and tourism development opportunities.

Tourism Platform of General Secretariat for Research and Technology (GSTR)

The specific document is part of a series of working documents edited by GSRT aiming to identify sectors of Smart Specialization and corresponding priorities for research, technology and innovation regarding the Programming Period 2014-2020. In the specific document [8], the tourism sector is mentioned as a regional priority in the framework of smart specialization. In this framework, several ideas and actions are proposed for the contribution to the value chains of various special tourism forms (categories).

Proposed actions for special tourism forms by the Tourism Platform of General Secretariat

Special tourism forms	Proposed actions
Cultural tourism	Identification, recording-documentation, digitization of the cultural reserve of the area. Organization of thematic routes and local cultural networks.
Maritime tourism	Cruise visitor information services for the available transportation options to the destination they arrive at, the connection of the points of interest with each means of transport and other relevant information. Design of flexible routes that meet the demand and promote the movement with M.M.M. and use of new technologies for real-time information and updating.
Therapeutic tourism	Information regarding the connection of these points of interest with existing public transport systems. Informing tourists regarding accessibility issues for the places to visit (existence of special infrastructure for the disabled). Information on the existence of relevant infrastructure in public transport systems and specialized services for people with special needs.
Events' tourism	Update on the connection of these points of interest with the existing public transport systems.
Tourism for elderly and people with special needs	Informing tourists about the accessibility of the tourist attractions. Information provision regarding the existence of relevant infrastructures in public transport systems and specialized services for people with special needs. Information provision regarding the existence of relevant infrastructure during their trips in the road network (ramps, headlights, lanes for blind people, etc.).

3.2.4 Multi-level governance and competences on sustainable tourism and mobility

There are three governance levels:

- National
- Regional
- Local

Powers division on tourism in Greece

The **central Government**, through the Ministry of Tourism, is responsible for [9]:

- The central government is responsible for:
- Planning and implementing national tourism policy.
- Planning national tourism development within the context of the general government policy.

- Cooperating with all relevant ministries in order to harmonize tourist-related policies and in order to create a welcoming environment for tourist-related investment;
- Representing the country on international and bilateral meetings related to tourism. Signing international cooperation agreements related to tourism.
- Planning and realising training programs with the aim of improving all tourist-related services;
- Designing actions to increase tourist inflows;
- Planning and conducting long-term marketing campaigns to promote Greek tourism;
- Drafting all primary and subsidiary legislation.
- Encouraging tourism investments through EU-funded programmes and national financial instruments.
- Developing maritime tourism by means of spatial planning and monitoring the operation of the national tourist ports.
- Mitigating seasonality (extending the tourism season)
- Focusing on the sectors in which Greece has a comparative advantage on tourism.
- Cooperating at European and international level with organisations and agencies in order to implement and disseminate good practices.
- Checking the compatibility of the regional and municipal promotion programmes and actions with the central planning of tourism promotion.
- At the decentralised level, through the decentralised administration, the state is responsible for the exercise of the necessary competences in order to ensure the effective operation of the tourism businesses (e.g. granting of certificates and licenses of operations) as well as meeting visitors'/tourists' demands and expectations (e.g. inspections of food and leisure businesses).
- The Ministry of Tourism is responsible to work with the relevant ministries in order to create a spatial plan that is appealing for investments on tourism.

The Greek National Tourism Organisation has Regional Tourism Services throughout Greece whose major competences are: granting the special license of operation, keeping the relevant tourism business register, inspecting/auditing tourism businesses and imposing sanctions in cases where there is a violation of the tourism legislation in force.

The Special Agency of Culture and Tourism (organisational unit of the former Ministry of Culture and Tourism) is responsible for planning, coordinating, managing and monitoring the implementation of the National Development Plan of the Ministry of Culture and Tourism and its supervised bodies.

In order to implement the national strategy for tourism, the Ministry cooperates with the competent bodies (e.g. Ministries of Infrastructure and Transport, Environment and Energy, Hellenic Statistical Authority, Local Government Organizations, etc.) and coordinates the operation of the supervised entities (mainly the services of the Greek National Tourism Organisation and of the Hellenic Chamber of Hotels).

Regional authorities are responsible for:

- The drafting and implementation of programmes for tourist planning and promotion, in order to enhance the tourist flows in their territory, ensure tourist development and promote the image of each region.
- The exercise of the necessary competences in order to ensure the effective operation of the tourism businesses (e.g. granting of certificates and licenses of operations) as well as meeting visitors'/tourists' demands and expectations (e.g. inspections of food and leisure businesses).

- The decision on the characterisation and border definition of Areas of Integrated Tourist Development.
- The drafting of infrastructure development plans for the enforcement of the climate change consequences on tourism, within the framework of development programmes.
- Licensing voyager ships that operate in lakes or rivers.

Municipal authorities are responsible for:

- The implementation or participation in programmes for tourism development and for the promotion of alternative forms of tourism and the creation of resorts and other leisure facilities.
- The development of cultural tourism.
- The enforcement of the respective law by the businesses of tourist interest.
- Linking agricultural production and tourism development.

The exercise of the necessary competences in order to ensure the effective operation of the tourism businesses (e.g. granting of certificates and licenses of operations) as well as meeting visitors'/tourists' demands and expectations (e.g. inspections of food and leisure businesses)

Powers division on transport in Greece

The **central government** is responsible for:

- Planning and implementing the national policy. It also develops the relevant national legislation and participate in creating the appropriate institutional framework at European and international level for the development of top-quality transport, mass-transit, telecom and postal services under conditions of fair competition.
- The planning and implementation of a coherent national strategy on road safety and safe transportation.
- The planning and implementation of transport and other infrastructure projects at the national level with the aim of increasing mobility, accessibility and strengthening the overall performance of the economy.
- Ensuring the safety of infrastructure and transport.

Regional authorities are responsible for:

- Issuing decisions on the change of legal address of companies operating public transport vehicles.
- Licensing the creation of transport companies.
- Administrating, reviewing and revoking driving licenses for cars and public buses;
- The definition of routes, bus stops and terminals, number of itineraries, timetables and fares for intercity buses (e.g. KTEL) and withdrawal of unfit buses.
- The formation of the disciplinary board for sanctioning transport operators and bus owners. Organising the periodic inspection of motor vehicles.
- The review, approval and commissioning of new intercity and interregional bus services (KTEL).
- The establishment of a new long-distance line. Defining the conditions according to which the new long-distance line would be awarded to an operator.
- Determining the number of new passenger cars for public use with a taximeter (taxis).
- The approval of cars for the needs of local authorities to address operational needs.
- Defining the exact jurisdiction, beyond the one that is already prevised, in which the violators of rules related with public use vehicles will be subject to criminal and administrative penalties.

- The exceptional licensing of private vehicles used by domestic or foreign entities and individuals that conduct major investments in the country or are subject to special investment-related legal provisions.
- Licensing lorries and cargo cars for public or private use.
- Licensing establishment and operation of petrol stations.
- Keeping the register of drivers and cars of public or private use.
- Licensing of vessels, which run on natural and artificial lakes and navigable rivers in the pursuit of tourism and transport trips.
- Licensing the establishment and operation of vocational schools for training of transport managers as provided for in Reg. (EC) 1071/2009.
- Planning and conducting examinations, establishing the examination committees and issuing certificates of professional competence for transport of passengers or goods to the graduates of vocational schools for transport managers.
- The authorisation of the establishment and operation of private national roads. Also responsible for withdrawing this license temporarily or permanently if it is no longer subject to the conditions under which it was awarded.
- Issuing of Community licenses for international road transport, within the Community.
- Issuing of control documents for international occasional carriage of passengers by coach and bus, as provided for in Reg. (EC) international 1073/2009, INTERBUS Agreement (2002/917/EC Decision of the Council) and bilateral Agreements.
- The granting of a certificate for road transport on own account, between EU Member States, Licensing the establishment and operation of vocational training drivers of vehicles carrying dangerous goods.
- Licensing of private Centre of Technical Control of Vehicles (K.T.E.O).
- The licencing and certification of imported used cars operating with anti-pollution technology.

Municipal authorities are responsible for:

- Constructing, maintaining, and managing municipal roads, parks, and public spaces.
- Urban planning and housing, building licensing, and control.
- Traffic regulation and planning.
- Public parking.
- Local public transport.
- Municipal transport with fares, which is of a contributory character and covers only operational needs. Municipal transport is used in the event that there is no public transport or for transporting residents belonging to social groups such as disabled, elderly and children, municipality employees and students to and from school.
- Urban transport. establishment of lines, stops, tariffs, passenger stops, withdrawal of buses.
- Construction and maintenance of local roads.
- Urban traffic control.
- Aqueducts and motorways.
- Prohibiting car parks in certain areas.
- Licensing road transport drivers (passenger/goods).
- Licensing car and motorcycle maintenance and repair technician places, car emissions controls. and
- Licensing training schools for driving cars and motorcycles.

- Dealing with outdoor advertisement, in order to ensure road safety.
- Management and exploitation of area zone of the ports of their jurisdiction and the construction and maintenance of the port works.

3.2.5 National cooperation schemes and action plans for sustainable tourism and mobility promotion

Main **Touristic Stakeholders** and **Unions of Touristic Stakeholders** on sustainable tourism are the following:

- Hoteliers
- Touristic Agencies
- Transport operators (including all transport modes)
- Tour operators and Tour guides
- NGOs related to the tourism sector

Hellenic Hoteliers Federation

The Hellenic Hoteliers Federation [10] was founded in 1949. It is an employers' organization and represents the hotel enterprises that are operating in Greece. The Hellenic Hoteliers Federation is undertaking initiatives and actions in order to protect the interests of the hotel enterprises that have to face an ever-changing environment, where the competition between traditional and emerging destinations is intensified.

Hellenic Chamber of hotels

The Hellenic Chamber of Hotels [11] operates since 1935 as a Legal Entity of Public Law. It is the institutional consultant of the Government as far as tourism and hospitality issues are concerned. Its members are, by law, all the hotels and camping sites of the country. It is a member of the Confederation of National Associations of Hotels, Restaurants and Cafeterias of EU member-states (HOTREC)

The purposes of the Chamber include:

- The investigation, suggestion and implementation of every measure that contributes to the development of the hotel industry in Greece
- The advisory support of all its members in financial, legal and labor matters
- The elaboration of studies
- The provision of statistical data regarding the number of hotels
- Detailed information on hotel units and services and camping
- Participation in international tourism exhibitions
- The organization of relevant conferences
- The cooperation of the hotel industry with the other sectors of the Greek economy

General Panhellenic Federation of Tourism Enterprises

The General Panhellenic Federation of Tourism Enterprises [12] is the Entrepreneurial Agency for the collective representation of Travel Companies in Greece. Based on the single Branch of Tourist Offices & touristic buses, it also represents Associations and Businesses of Maritime Agencies. Basic goals are the service and promotion of its Members interests, but also the elaboration and promotion of policies and actions for the development of Greek tourism and the improvement of its position internationally.

HATTA

HATTA, the Hellenic Association of Travel and Tourist Agencies [13], was established in 1927. Since then, the Association has been contributing dynamically to the development and promotion of Greek Tourism, providing through its members a variety of differentiated services that have been supporting the country's developmental efforts while upgrading the quality of the tourist services offered. At the same time HATTA is a trade union aiming at defending its members' interests.

Hellenic Confederation of Tourist Accommodation Entrepreneurs (S.E.T.K.E.)

It is the leading tertiary body representing entrepreneurs - owners of rooms and apartments in Greece [14]. In this confederation, all small tourist family businesses of rented rooms and apartments which ensure holidays in Greece to a large number of Greek and foreign tourists are included, covering 50% of tourist traffic. Through its website, visitors can quickly and easily find their desired holiday accommodation and make reservations directly with the owner of the chosen accommodation, without intermediaries and time-consuming process.

Panhellenic Federation of tourist guides

Panhellenic Tourist Guides' Federation [15] was founded in the year 1985, as an umbrella second-degree association, which represents all qualified tourist guides' associations of Greece. Its website offers the opportunity to the professional qualified tourist guides to contact to each other, to be informed about matters related to their profession, insurance and social security, legislation, education, conventions and seminars, as well as matters concerning environmental protection in archaeological sites and tourist routes of Greece. It also offers to all tourism, culture and education professional sectors the chance to find and book a qualified tourist guide for Greece, through all local first-degree tourist guides' associations.

Greek Union of air travel agencies (P.E.T.A.G.A.)

P.E.T.A.G.A. [16] is an travel agents association, founded in 1983, with mission to safeguard, study and promote the common financial, social and professional interests of travel agencies that are involved with distribution or airlines tickets. P.E.T.A.G.A. interacts with public, administrative and judicial authorities, the government and travel unions organizations both in Greece and abroad, as well as air travel and tourism stakeholders in order to ensure and safeguard the professional interests of its members.

Hellenic Yacht Brokers Association (HYBA)

HYBA, [17] groups the best professionals of the yachting industry in Greece. It promotes, advises and informs about Hellenic Yachting and Cruising the Archipelago and shares its experience with anyone around the world.

Hellenic Association of Tourist Skiing

Hellenic Association of Tourist Skiing [18] is a non-profit club, with people interested in snow sports as its members. Members have full access to information regarding snow sports (Greek and foreign ski resorts, news, weather forecasts, mountain activities etc.), can participate in Club events all year long for improving skiing/snowboarding skills and contribute to the improvement of snow sporting conditions in Greece.

Hellenic Professional Yacht Owners Association (HPYOA)

HPYOA, [19] widely known as EPEST, is a non-profitable institution. Its Members are Greek owners of more than 4.000 professional yachts (manned or Bare-Boat), governed by the Greek law 2743/99. EPEST was established in 1974 with aim to study and plan the nautical tourism, the promotion of economic and professional interests of its members, the development of a spirit of cooperation, assistance and brotherhood between them as well as of every other activity which would lead to the improvement of terms and conditions for the employment of their yachts, and to the freedom and safety of navigation.

Within the framework of the Terms of Reference, the Association attends all the relevant with its object, developments in the Ministry of Merchant Marine, the Ministry of Tourism, in the National Tourism Organization, the Ministry of Economy, the competent Authorities in the European Union, in other Administrative State Services, in the Chamber of Shipping, as well as in International Organizations.

The Association intervenes whenever and wherever appropriate for the planning of right policy. EPEST'S efforts include such activities as updating its legal framework for the limitation of illegal charters by foreign flag non license yachts, improvement of Marinas' infrastructure, increase of berths in the marinas, cleanliness of marinas, safety against any danger as well as establishment of any measure for the improvements of the operations of marinas and of the services rendered by the public or private sector.

Greek Marinas Association (G.M.A)

G.M.A. [20], was established in 2010 in order to represent, upgrade and promote the tourist ports and marina facilities throughout the country. GMA membership includes 77% of the total regional berthing capacity, having as members both public and private, well organized marinas that focus on Quality, Safety and customer satisfaction. GMA's main mission is the improvement of the national context of development, operation and exploitation of tourist ports. Greek marinas are the essential infrastructure for the yachting networks and the key factor for Sea Tourism development in Greece. It's website is a guide of the GMA members, geographically divided, with basic information on each of the marinas.

Main **Touristic Cooperation Schemes** are:

Greek National Tourism Organization (GNTO)

GNTO, [21] is governmental department established in 1929. Its main goal is the organization, development and promotion of tourism in Greece by using all of the country's potentials. It supervises and controls all the touristic market's relevant actions as well as any other activity deemed as necessary for the promotion of the touristic product.

Greek Tourism Confederation - SETE

SETE [22] is an umbrella organization representing various sectors, including accommodation, transportation & travel, recreation, banking & finance, consulting and education. It is the leading advocate and a collective voice for the ever-growing and competitive Travel and Tourism industry in Greece, the key economic sector in the national economy. A recognized social partner of the State, SETE speaks on behalf of the sector, its associations and its businesses of all sizes. SETE's members are both individual companies and associations of businesses. With 13 Associations of Tourism Enterprises as members, the Confederation represents, indirectly, more than 40.000 businesses and 330.000 employees.

INSETE Institute

INSETE [23] is a non-profit organization founded in early 2013, on the initiative of SETE, to contribute with well-substantiated ideas for promoting both public and private policies that will support, modernize and improve the Greek tourism sector and any other service sector which is directly or indirectly associated with it. The Institute contributes effectively in documenting the significance of tourism for the Greek economy and society and boosts the knowledge and skills of its human resources, while supporting a qualitative improvement of the sector.

Marketing Greece

Marketing Greece [24]: is a collaboration of private sector tourism to promote Greece as a modern and exciting tourism destination. It is a non-profit initiative of the Greek Tourism Confederation (SETE) and the Hellenic Chamber of Hotels. Its mission is to support the implementation of the national tourism strategy, in line with SETE's priorities and strategy for Greek tourism as specified in its 2021 Roadmap, and to cooperate with relevant state bodies. Thessaly Tourism Partnership presented below is a case study of Marketing Greece

Thessaly Tourism Partnership: it represents a pioneering cooperation model between Marketing Greece and Coca Cola Tria Epsilon, in collaboration with the Region of Thessaly, with a long-term goal of working as catalyst for the development of the region generally. In doing so, the Thessaly Handcrafted by Time campaign was developed to promote Thessaly as a tourism destination. The strategic goals of the initiative were:

- To enhance the tourism sector of Thessaly as a means of stimulating the region's economy
- To promote the image of the destination internationally and, by extension, local development
- To offer practical answers and support to the needs of the tourism industry locally

There were two principal pillars to the work of the «Thessaly Tourism Partnership»:

- Targeted promotion of the destination and local products of Thessaly using modern digital tools
- Support of tourist entrepreneurship.

Athens and Partners

Athens & Partners [25] is an open, collaborative, public-private partnership, initially formed between the City of Athens, Aegean Airlines and Athens International Airport in 2016. In 2018, the Greek Tourism Confederation joined 'This is Athens & Partners'. This unique alliance has already attracted other major stakeholders such as Lamda Development, TEMES and Lampsa Hellenic Hotels S.A., boosting its efforts to establish Athens as a year - round destination.

Its mission is to create a unified Athens brand that captures the city's true identity and authenticity, focusing on promoting Athens' international ranking as a business destination, targeting higher spending visitors, and increasing the average length of stay. All of its actions and marketing campaigns are implemented by three main bodies: The Athens Destination and Development Management Agency, Marketing Greece, and The Athens Partnership.

Hellenic Association of Professional Congress Organizers (HAPCO)

HAPCO [26] was established in 1996, with the primary purpose to bring together the professional congress organizers and companies from the whole range of services and products of the conference market at an institutional level as well as their representation. Since then, **HAPCO** promotes and supports its members views and interests, as one of the most important organizations in the Greek tourism sector. At the same time, it constitutes the official intermediate with the state and other cooperating competent bodies and agencies, regarding professional and conference tourism issues and policies.

Skal International Athens - Greece

Skal International, [27] member of the Board of Directors of the International Tourism Organization, is the International Organization that unites all sectors of the travel and tourism industry. It is represented by Senior and Management executives of tourism who meet locally, nationally and internationally to discuss issues of common interest in an environment of friendship and solidarity. Skal International Athens - Greece was founded in 1954 by tourism agents and distinguished personalities of the Greek business market. The

members of Skal participated all these years in the International Conferences and created close ties in favour of the promotion of tourism in Greece participating in discussions and decisions for the benefit of common goals.

3.3 National policies, strategies and action plans for sustainable tourism and mobility promotion: Slovenia

3.3.1 Brief introduction. Tourism in Slovenia

In 2017, the GDP related to tourism amounted to EUR 2.3 billion, or 5.3% of total GDP. Considering the direct and indirect impacts, tourism contribution to the GDP is estimated to be EUR 3.6 billion, that is approximately 8.4% of total GDP. In 2018, tourism exports amounted to EUR 2.7 billion, creating a tourism balance of payments surplus of EUR 1.7 billion. In 2018, tourism industries employed 68 150 people and directly accounted for 7.7% of total employment in the country. Travel exports accounted for 34.0% of total service exports in 2018.

Inbound tourists amounted to 4.4 million in 2018, up 10.9% from the previous year. Overnight stays for international tourists in all accommodation categories totalled 11.2 million in 2018, an increase of 15.4% over 2017. Core markets included Italy (13.5% of all inbound overnight visitors), Germany (11.4%), Austria (8.6%), Croatia (4.9%), the Netherlands (4.2%), the United Kingdom (3.7%), and Serbia (3.1%). The Netherlands and Germany, experienced year on year growth of 22.7% and 15.9% respectively. In 2018, domestic trips totalled 10.9 million, of which 2 million (18.3%) were overnight stays, and 8.9 million (81.7%) same-day visits. The total number of overnights in all accommodation was 5.4 million, an increase of 11.1% from 2017 (OECD Tourism Trends and Policies 2020).

3.3.2 National legislative framework and key actors

The Ministry of Economic Development and Technology is responsible for implementing national tourism policy. Marketing is the responsibility of the Slovenian Tourism Board, a public agency that is also responsible for tourism information, market data, coordinating product development, engaging stakeholders and undertaking market research. At the national level, the Statistical Office of the Republic of Slovenia is charged with collecting, analyzing and disseminating tourism data while the Slovene Enterprise Fund encourages tourism SMEs investment via soft loans and grants. Tourism industry organisations include: i) the Chamber of Commerce and Industry of Slovenia – with the related Chamber of Tourism and Hospitality representing the interests of tourism entrepreneurs via optional membership, ii) the Chamber of Crafts and Small Business of Slovenia – representing the interests of tourism and catering entrepreneurs and craftsmen, iii) the Trade Union of Tourism and Catering workers, and iv) the Tourism Association of Slovenia – incorporating 655 local association members.

The strategic planning of tourism reflects a close partnership between the public and private sectors, as well as tourism NGOs. The Ministry co-operates and regularly consults with the industry organisations representing the accommodation and hospitality industry, travel trade, wellness tourism, MICE, etc. In terms of different sectoral policies and legislation co-ordination with an impact on tourism, a wide cross-governmental co-operation exists. Particular emphasis is currently placed on working with four ministries: Culture; Agriculture, Forestry and Food; Infrastructure; Spatial planning and Environment, Education and Sport.

The twelve Regional Development Organisations accountable to the Regional Councils undertake overall development at regional level including the tourism development programmes. The Government has additionally established and funded twelve Regional Destination Organisations to support tourism development, promotion and marketing at the regional level. Regional tourism development priorities are governed by national legislation and reflect basic goals of the National Tourism Strategy but with specific regional development goals. At local level, each mayor and Community Council is responsible for tourism

development. A locally collected accommodation tax provides EUR 17.5 million per year, and it is dedicated to local tourism development and marketing. This is the principal source of funding for local tourism development typically providing investment for information centres, walking and cycling trails and local marketing activities.

In 2018, the central tourism budget was EUR 13.5 million, with EUR 12.9 million of this being allocated to the Slovenian Tourism Board. The Promotion of Tourism Development law provides a further source of funding consisting of both the tourist tax and an additional promotional tax providing some EUR 4.5 million annually. Another source of revenue for tourism development budget comes from the State's gambling concessions, which is allocated to pre-defined areas of Slovenia and amounts to approximately EUR 18 million per year (OECD Tourism Trends and Policies 2020).

3.3.3 National policies and strategies on tourism and sustainable mobility

In 2017, the Government of the Republic of Slovenia adopted a new Strategy for the sustainable growth of Slovene tourism 2017-21, with the strategic vision for Slovenia to be recognised as a global, green, boutique, five stars destination for demanding visitors. The strategic goal of Slovene tourism is to increase revenues from international visitors to EUR 3.7 billion by 2021 from the current EUR 2.7 billion. Supplementary targets include an additional 5- 5.5 million visits, 16-18 million overnight stays, and 18.000 to 22.000 new rooms. Six key policies are identified:

- Developing a new organisational structure for Slovene tourism - which has divided the country into four macro-destinations (Mediterranean Slovenia, Alpine Slovenia, Thermal Pannonian Slovenia and Central Slovenia with Ljubljana) and 35 lead destinations. To support sustainable tourism development and management of destinations, the Master Plans for the four main destinations are in development. Master Plans will focus on tourism education and training, stimulating green and innovative tourism products of SMEs and high-quality services development, enhancing digital promotion of the 35 lead destinations, and marketing clusters of similar destinations and geographically linked exceptional tourist experiences. The objective of the clusters is to strengthen the identity of particular destination and to achieve synergies both in development of the most representative destination products and services along with the more focused marketing communications and destination promotion.
- Streamlining institutional and legal frameworks to create a better environment for business to flourish. This will include a more effective distribution of the tourist tax at local level; expanding the definition of accommodation to include new forms and accommodation quality standards, such as glamping facilities; new regulations for mountain biking and hiking trails; training for outdoor sports; and improvements to safety and security legislation.
- Investing in new and existing accommodation and related tourism infrastructure to increase competitiveness and raise quality.
- Investing in training and education, including updating vocational education standards; developing upper- level courses; promoting tourism as a business and entrepreneurial potential for changing the image of employment opportunities in the sector; establishing a national centre for on-the-job education and training; assisting small and specialised hotels for improving their employees skills and trainings.
- Strengthening land use planning to enable better inclusion of cultural and natural resources and appropriate tourism infrastructure construction planning.
- Supporting small tourism businesses to encourage entrepreneurship and enhance the quality of the tourism offer. Support to small businesses is focused on digital transformation; transition to a low carbon economy; and assistance with grant procurement to improve product quality and services. Some EUR

13.4 million of small grants has been allocated to SMEs over the last two years. To support investment in sustainable tourism and increase the competitiveness of tourism SMEs, a special Incentive credit scheme at the SID Bank of Slovenia, a public development and export Bank, amounting to EUR 160 million, has been established.

Slovenia has introduced a national Strategy for Smart Specialization, which is the base for the creation of Strategic Innovation Development Partnerships, including the one for tourism. The Strategic Partnership for Tourism allows for the wide participation of interested stakeholders from commerce, the research and development sector, civil society and the public sector to co-operate in providing smart and digital solutions for more accessible and competitive Slovene tourism. Key areas of project co-operation include development of new digital channels to attract consumers, digitalising a wide range of tourism products and new ICT solutions to maximise the efficiencies of tourism businesses on the market. Aligned to the Digital Slovenia 2020 Strategy, the new digital solutions are envisaged to support the sustainable use of natural and cultural resources for tourism and to upgrade the Green Scheme of Slovene tourism (OECD Tourism Trends and Policies 2020).

3.3.4 Multi-level governance and competences on sustainable tourism and mobility

Slovenia became a parliamentary republic when it gained its independence from Yugoslavia in June 1991. Slovenia has a bicameral parliament composed of the National Assembly and the National Council. The former is the general representative body of the Slovenian nation and exercises legislative and electoral powers, as well as control over the executive and judicial powers. The National Council is the representative body for social, economic, professional, and local interests. Slovenia has been a member of the European Union since 2004.

The Constitution, adopted in 1991, guarantees local self-government (Art. 9 and Art. 138 to 144). The country developed into a decentralised unitary state in 1993 as the Local Self-Government Act was adopted. This provided for territorial reorganisation, and new municipalities replaced the former communes.

Slovenia is thus a decentralised unitary state composed of statistical regions, devolved state administration units, and municipalities. In 2006, the Constitution was amended in order to enable the establishment of regions, which did not exist until then. The country has twelve statistical regions, which have no administrative function. For the purpose of the regional policy of the European Union, Slovenia has been divided into two cohesion regions: East Slovenia and West Slovenia.

In addition, Slovenia is composed of fifty-eight devolved state administrative units, which ensure state responsibilities and manage affairs falling under the area of expertise of their respective ministries at regional level. They are headed by a head of the unit, appointed by the minister of public administration. However, these units do not have the status of local government. Finally, Slovenia is composed of 212 municipalities, 11 of which have urban status.

State authorities supervise the legality of the work of local community authorities. According to Article 140 of the Constitution, the competencies of a municipality comprise local affairs (related to internal affairs, traffic, construction, agriculture, denationalization, victims of war violence, etc.), which may be regulated by the municipality autonomously and which affect only the residents of the municipality. According to Article 143 of the Constitution, the state could transfer the performance of specific duties within the state competence to the regions and must provide them the necessary financial resources to enable this. However, the regions have not been established yet.

In 2017, municipal revenue amounted to almost EUR 1,98 billion. Municipalities in Slovenia obtain their money from tax revenues, non-tax revenues, capital revenues, donations, transfers, and EU funds.

Specifically, the Financing of Municipalities Act (2006, 2008, 2011, 2015) stipulates that municipalities finance their activities from four major groups of revenues – their own tax revenues (revenues from inheritance and gift taxes, property taxes, taxes on real estate transactions, vessel tax, tax on winnings from conventional games of chance, and any other tax where so provided by the Act governing taxes), non-tax revenues (revenues from imposed contributions, dues, fines, concession fees, payments for public services, environmental fees prescribed on the basis of the act governing environmental protection for burdening of the environment with wastewater and disposal of waste), revenues from the management of municipal property and tangible financial assets, grants, and transferred revenues from the national budget and EU funds.

In 2017, tax revenue represented 71,76 % of municipal revenue, non-tax revenues amounted to 17,15 %, capital revenue to 2,58 %, transfers to 8,25 %, and EU funds and donations to 0,24 %. Own-sources (tax and non-tax) represent 88,92 % of municipal revenue.

3.3.5 National cooperation schemes and action plans for sustainable tourism and mobility promotion

The Green Scheme of Slovenian Tourism (GSST) is a national tool and certification program for promoting sustainable tourism in Slovenia. The tool has been identified as a good practice by Interreg Europe CircE project as part of interregional learning process. The key strategic objective of the scheme is to introduce sustainable models to Slovenian tourism, tourism service providers and destinations. Specifically, it focuses on offering tools to destinations and service providers that enable them to evaluate and improve their sustainability endeavours and promoting these green endeavours through the SLOVENIA GREEN brand.

Slovenian Tourist Board manages and develops the scheme, offers education, and international promotion for Slovenia Green (SG) destinations and service providers. Association for Sustainable Tourism GoodPlace has a license to make assessments using the Green Destinations Standard and is a Green Destinations partner. The GSST is based on international sustainability criteria. To obtain the Slovenia Green Destination label (bronze/silver/gold), the destinations must meet the Green Destinations Standard criteria, while providers first obtain/present one of internationally recognised labels that are also verified by Slovenia Green. Having the SG Destination, SG Accommodation, SG Travel Agency or SG Park label increases the visibility of destinations, accommodation providers, travel agencies or parks and increases the level of promotion they receive through national and international channels.

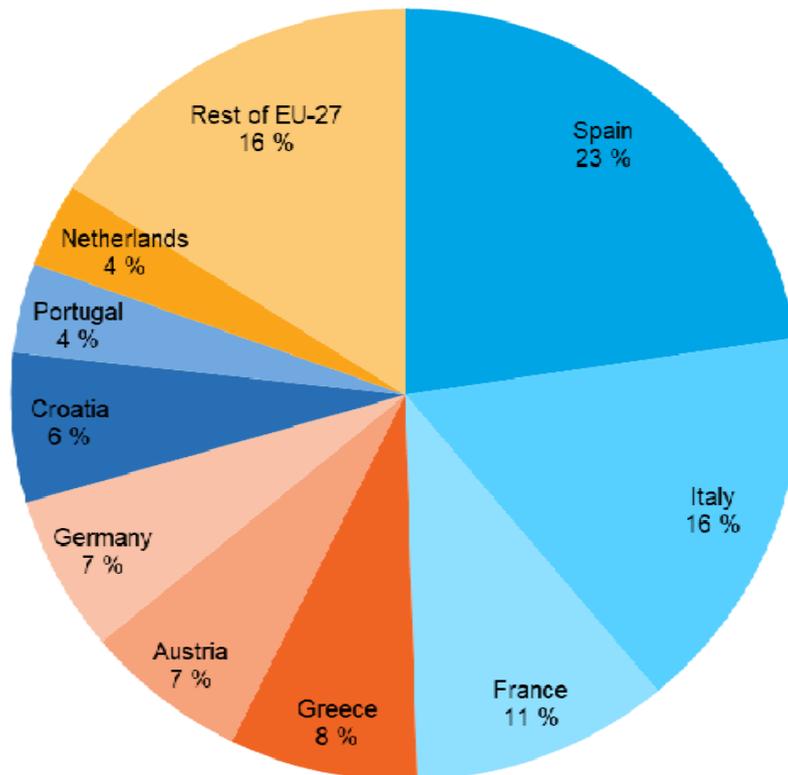
Currently, in Slovenia there are 37 destinations, 22 accommodations, 3 natural parks and 2 agencies, which comply with the green strategy and obtained the Slovenia Green label. The Green Scheme of Slovenian Tourism is an inspiring example how to encourage destinations and tourism service providers to adopt standards of sustainability and stimulate innovation in tourism sector.

There are existing certification programmes in Slovenia (Travelife, Green Globe, Green Key, EU Eco Label, Bio Hotels and EMAS), so tourism businesses are free to choose the label that suits them best, content-wise and financially. On top of the international label they can also get the Slovenia Green certificate.

3.4 National policies, strategies and action plans for sustainable tourism and mobility promotion: Croatia

3.4.1 Brief introduction. Tourism in Croatia

With its geographical position in the world's most important tourist area, Europe and the Mediterranean, Croatia is gaining a competitive tourist advantage. In addition, Croatia possesses many natural and cultural attractions. This is the reason why Croatia is an important tourist destination, which has a 6% share of nights spent at EU-27 tourist accommodation, as it has been illustrated in the following figure.



Share of nights spent at EU-27 tourist accommodation by tourists travelling outside their own country of residence, 2018 (% of all nights spent in EU-27 tourist accommodation) - Source: Eurostat, 2020

Mass tourism in Croatia expanded in the 1960s and in the 1970s, especially a typical "sea and sun" tourism model with stays concentrated in coastal areas in the summer months.

Tourism is a key sector of the Croatian economy. Some of statistic facts that support this assertion are (Orsini & Ostojić, 2018):

1. expenditure by international tourists amounted to 45.5 billion EUR in 2016, roughly 19% of Croatia's GDP and over 35% of its export revenues,
2. international tourism accounted for roughly 7% of the employed population in Croatia,
3. international tourism represented about 92% of overall tourism in 2016.

Basic data about the development of Croatian tourism are given in the following table.

	1980	1985	1990	1995	2000	2005	2010	2015
Number of beds (in 000)	692	820	863	609	710	909	910	1029
Number of tourists (in 000)	7,929	10,125	8,498	2,438	7,136	9,995	10,640	14,343
Number of overnights (in 000)	53,600	67,665	52,523	12,885	39,183	51,421	56,416	71,605
Average number of overnights per bed	77	83	61	21	55	57	62	70
Average number of overnights	6,8	6,7	6,2	5,3	5,5	5,1	5,3	5,0

Basic indicator of tourism development in Croatia Source: Ministry of Tourism of the Republic of Croatia, 2019

After the "Homeland War" the number of accommodation units in Croatia is continuously growing, but the accommodation offer is skewed towards relatively cheap structures (such as private vacation houses and camping grounds). The share of hotels and aparthotels amounts to a modest 11% in the total accommodation facilities in Croatia, as it could be observed in the following table.

	NUMBER OF BEDS		INDEX	STRUCTURE (in %)	
	2017	2018	2018/17	2017	2018
Hotels and Aparthotels	132,576	130,026	98,1	10.98	10.27
Tourist resorts	26,289	26,032	99	2.18	2.06
Tourist apartments	11,854	11,503	97	0.98	0.91
Camping	241,819	235,745	97.5	20.03	18.62
Private rooms	741,509	800,108	107.9	61.41	63.19
Spas	2,011	1,796	89.3	0.17	0.14
Vacation facilities	1,968	1,978	110.5	0.16	0.16
Hostels	16,398	17,420	106.2	1.36	1.38
Other	28,566	40,098	140.4	2.37	3.17
Uncategorized accommodation	4,437	1,561	35.2	0.37	0.12
TOTAL	1,207,427	1,266,267	104.9	100	100

Types of accommodation in Croatia (as of 31th August 2018)

Source: Ministry of Tourism of the Republic of Croatia, 2019

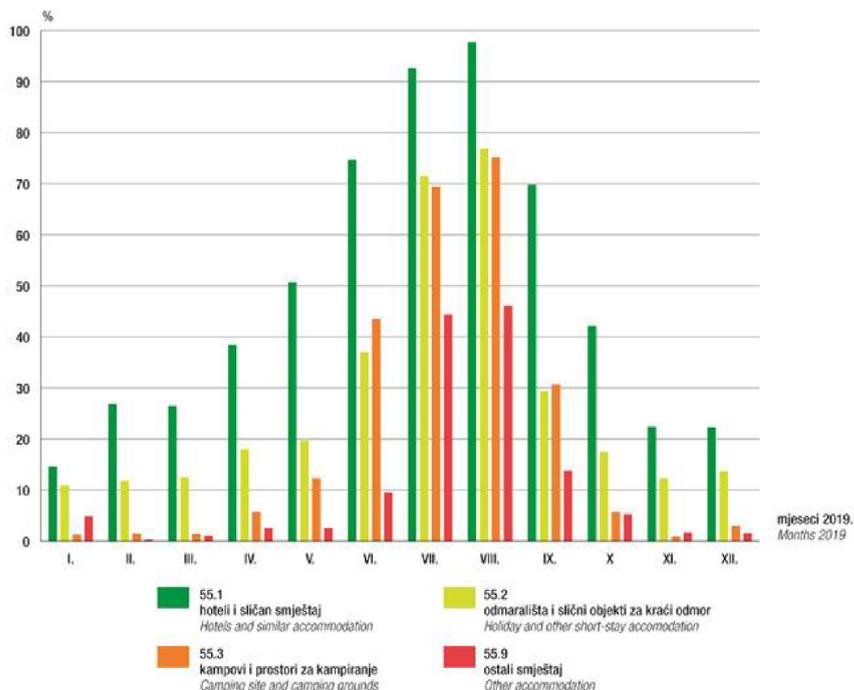
The majority of foreign tourist arrivals and nights in 2019 were realized by tourists from Germany, as much as 2.9 million arrivals and 19.9 million nights (16.6% of the total realised foreign tourist arrivals and 23.7% of the total realised foreign tourist nights). These were followed by the nights realised by tourists from Slovenia (8.9%), Austria (8.4%), Poland (7.0%), Italy (6.1%), the Czech Republic (5.9%) and the United Kingdom (5.1%) (CBS, 2020).

Croatia is a typical destination for family holiday. In 2019, tourists aged up to 14 realised the most nights, 16.9 million, which accounts for 18.5% of the total realised nights. They were followed by tourists aged 35 to 44, who realised 16.1 million nights, which accounts for 17.7% of the total realised nights (CBS, 2020).

The biggest problem of Croatian tourism is strong seasonality. Most tourist overnights (84%) are realized from June to September. The following table and figure show how permanent beds in the accommodation are occupied only in the summer months.

Month	Tourist overnights	Share (%)
January	532.075	1%
February	485.251	1%
March	1.014.777	1%
April	2.513.405	3%
May	5.759.584	6%
June	11.850.435	13%
July	25.918.243	29%
August	27.050.599	30%
September	10.186.069	11%
October	2.826.494	3%
November	781.182	1%
December	733.585	1%
Total	89.651.699	100%

Tourist overnights in Croatia per month in 2018
Source: Ministry of Tourism of the Republic of Croatia, 2019



Occupancy rate of permanent beds (according to NKD 2007., division 551) in 2019
Source: Orsini & Ostojić, 2018

The price of tourism services and the characteristics of the tourism model largely determine tourist spending. The "sun and sea" model is typically associated with lower levels of consumption and a tourist infrastructure skewed towards the mid-low range. In Croatia the average tourist spending per person and night (computed as the ratio of foreign tourism revenue to the number of non-domestic overnights) is around 70% of the average for the Mediterranean region (Orsini & Ostojić, 2018). Average daily consumption of tourists in the destination is 98 EUR per person per night of which 54% is expenditure related to accommodation services, 17% to food and beverage services outside accommodation facility, and 29% to all other services (Tomas Ijeto, 2020).

Some structural weaknesses prevent the sector from achieving its full potential. International tourism is on the rise, worldwide and in Europe. Its expected continued expansion is an opportunity for Croatia, but the sector is still far from achieving its full potential. High seasonality, limited range of services, and low average spending are frequently mentioned weaknesses of the Croatian tourist model (Ministry of Tourism, 2013).

3.4.2 National legislative framework and key actors

Organizational structure of tourism in the Republic of Croatia

The interdisciplinary character of tourism determines its connection with numerous areas, from catering to transport, trade, culture, sports, agriculture, industry, construction and many others. The organizational system of tourism in the Republic of Croatia built on these foundations is extremely complex because it connects numerous factors from the public and private sectors.

Despite this complexity of tourism, its organizational structure follows a certain stratification, so it's possible to talk about the following levels of tourism organization within a country: social, economic, vocational and international level and social authorities. This stratification has been presented in the following figure.



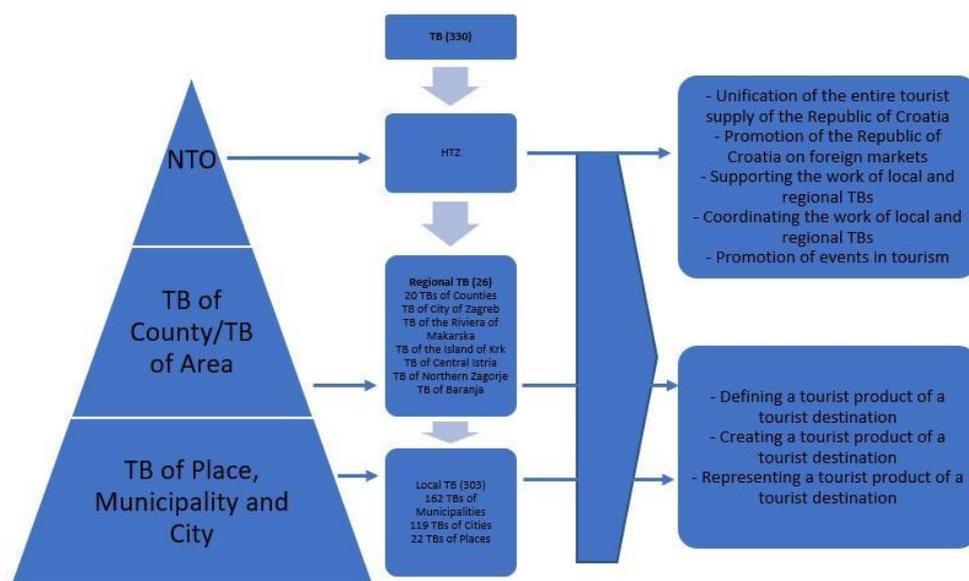
Tourism organization system in the Republic of Croatia - Source: Ćorluka, 2019

State level

At the state level, the Ministry of Tourism and its county tourism offices, as well as the Croatian National Tourist Board, act most directly on Croatian tourism. In the following paragraphs some of their most important tasks are briefly described:

The Ministry of Tourism, as the supreme body of the state administration for tourism, is in charge of administrative and professional affairs, all of which are prescribed in detail by special regulations. It carries out administrative and professional tasks related to the country's tourism policy as part of the general economic policy and determines the country's tourism development strategy. For the purposes of this report, it is important to point out from a number of tasks that the Ministry encourages the development of specific forms of tourism and takes measures to improve the quality of the overall tourist offer in the country.

In addition to the Ministry of Tourism, which has been active in the Republic of Croatia as independent authority since 2008, the system of Tourist Boards (TB) has been operating since 1991, modelled on the Austrian pattern. Tourist boards are legal entities established to promote and advance Croatian tourism; settlement of the general, public interest realized by the public sector and economic interests of legal and natural persons, private sector, in all activities whose operations are related to tourism (hotel, restaurant, entertainment, trade, various services, etc.) so as to manage the destination at the level for which they were founded (Ćorluka, 2019). Tourist boards are established on the level of municipalities and cities, counties and the whole country (Croatian National Tourist Board - CNTB), but there are also tourist boards on the level of wider areas and tourist boards on the level of tourist places, which are optional forms of tourist boards. All units of local self-government in the area of which at least one settlement can be characterized as a tourist place (according to precisely prescribed criteria), are obliged to establish a tourist board of the municipality or city (Ćorluka, 2019). Structure and tasks of tourist boards in the Republic of Croatia have been presented in the following figure.



Structure and tasks of tourist boards - Source: Ćorluka, 2019

For the purposes of this report, it is important to emphasize that the goals of all Tourist Boards are to encourage the development and improvement of the existing tourist product for the area in which they are established and to develop awareness of the importance of tourism and the need to preserve the environment (Ćorluka, 2019).

The duty of the president of the Croatian National Tourist Board is performed by the Minister of Tourism, and thus the two institutions at the state level are inextricably linked.

Economic level

The main economic operators in Croatian tourism are companies and craftsmen, who must (compulsory membership) unite in chambers, depending on the legal and organizational form:

- Croatian Chamber of Trades and Crafts (CCTS),
- Croatian Chamber of Commerce (CCC).

Croatian Chamber of Trades and Crafts is a non-governmental, professional and business organization of all legal entities registered in the Republic of Croatia for performing craft activities. The Croatian Chamber of Commerce is a non-governmental, professional and business organization of all legal entities registered in the Republic of Croatia for performing economic activities. Both chamber organizations are organized according to the territorial and professional principle. In addition to the national level, there are also regional chambers at lower regional levels (Ćorluka, 2019). Within these organizations, guild associations and groups are established that also cover the field of tourism.

Vocational level

With the desire for coordinated action towards the state and economic environment and a more successful appearance on the market, economic entities in Croatian tourism are joining their professional and vocational associations:

- Association of Employers in Croatian Hospitality (AECH)
- Croatian Camping Union (CCU)
- Croatian Association of Nautical Tourism Ports (CANTP)
- Association of Croatian Travel Agencies (ACTA)
- Adriatic Croatia International Club (ACI)
- Ruralis, etc.

Professional associations connect representatives of the same professions in order to resolve common issues, develop and promote activities.

3.4.3 National policies and strategies on tourism and sustainable mobility

The Croatian key national policies, strategies and actions plans on tourism and sustainable are based on two European strategies:

1. EUROPA 2020. Europska strategija za pametan, održiv i uključiv rast - EUROPE 2020 - A European strategy for smart, sustainable and inclusive growth

Link: http://www.europski-fondovi.eu/sites/default/files/dokumenti/Europa_2020.pdf

2. Održiva Europa do 2030. - Towards a sustainable Europe by 2030

Link:

https://ec.europa.eu/commission/publications/reflection-paper-towards-sustainable-europe-2030_hr

https://ec.europa.eu/commission/sites/beta-political/files/rp_sustainable_europe_hr_v2_web.pdf

Some strategic documents in Croatia were valid until 2020 but they were extended because the new ones are not adopted. The list of national policies, strategies and actions plans on tourism and sustainable mobility:

1. Strategija održivog razvitka Republike Hrvatske - Sustainable Development Strategy of the Republic of Croatia
Link: https://narodne-novine.nn.hr/clanci/sluzbeni/2009_03_30_658.html
2. Strategija prometnog razvoja Republike Hrvatske (2017. - 2030.) - Transport Development Strategy of the Republic of Croatia (2017 - 2030)
Link: <https://mmpi.gov.hr/UserDocImages/arhiva/MMPI%20Strategija%20prometnog%20razvoja%20RH%202017.-2030.-final.pdf>
3. Strategija razvoja turizma Republike Hrvatske do 2020. Godine - Tourism Development Strategy of the Republic of Croatia until 2020
Link: <https://vlada.gov.hr/UserDocImages//ZPPI/Strategije%20-%20OGP/turizam//130426-Strategija-turizam-2>
4. Zakon o turističkim zajednicama i promicanju hrvatskog turizma – Tourist Boards and Promotion of Croatian Tourism Act
Link: https://narodne-novine.nn.hr/clanci/sluzbeni/2019_05_52_990.html
5. Zakon o pružanju usluga u turizmu – Act on the provision of services in tourism
Link: <https://www.zakon.hr/z/343/Zakon-o-pruzanju-usluga-u-turizmu>
6. Zakon o sigurnosti prometa na cestama – The Road Traffic Safety Act
Link: https://narodne-novine.nn.hr/clanci/sluzbeni/1996_07_59_1186.html

There are also several strategies that do not directly rely on tourism and sustainable mobility, but they are related with them:

1. Strategija gospodarenja otpadom Republike Hrvatske - The Waste Management Strategy of the Republic of Croatia
Link: https://narodne-novine.nn.hr/clanci/sluzbeni/2005_11_130_2398.html
2. Nacionalni akcijski plan za obnovljive izvore energije do 2020. godine - The National Renewable Energy Action Plan 2020
Link: <http://www.europski-fondovi.eu/sites/default/files/dokumenti/Nacionalni%20akcijski%20plan%20za%20obnovljive%20izvore%20energije%20do%202020.%20godine%20%28prijedlog%29.pdf>
3. Program ruralnog razvoja Republike Hrvatske za razdoblje 2014. – 2020. godine - Rural Development Programme of the Republic of Croatia for the Period 2014-2020
Link: <http://europski-fondovi.eu/sites/default/files/dokumenti/Program%20ruralnog%20razvoja%202014.-2020.pdf>
4. Integrirani nacionalni energetska i klimatski plan za razdoblje od 2021. do 2030 - The Integrated National Energy and Climate Plan for the period 2021-2030
Link: https://mzoe.gov.hr/UserDocImages/UPRAVA%20ZA%20ENERGETIKU/Strategije,%20planovi%20i%20programi/hr%20necp/Integrirani%20nacionalni%20energetski%20i%20klimatski%20plan%20Republike%20Hrvatske%20%20_final.pdf

5. Strategija obrazovanja, znanosti i tehnologije - Strategy of education, science and technology
Link:
http://www.europski-fondovi.eu/sites/default/files/dokumenti/Strategija%20znanosti%2C%20obrazovanja%20i%20sporta_NN_124_2014.pdf
6. Strategija pametne specijalizacije - Smart specialization strategy
Link:
http://europski-fondovi.eu/sites/default/files/dokumenti/Strategija_pametne_specijalizacije_RH_2016_2020.pdf
7. Strategija prostornog razvoja Republike Hrvatske - Spatial Development Strategy of the Republic of Croatia
Link:
https://vlada.gov.hr/UserDocImages//ZPPI/Strategije%20-%20OGP/graditeljstvo//SPRRH_nacrt-prijedloga.pdf

3.4.4. Multi-level governance and competences on sustainable tourism and mobility

There are three governance levels:

- National
- Regional
- Local

On the national level Government of the Republic of Croatia exercises executive power pursuant to the Constitution and the law. In the exercise of executive power, the Government determines, directs and aligns the implementation of policies and programs and to that end proposes and adopts strategies, issues guidelines, adopts acts and undertakes other measures necessary to regulate relations in the sphere of its competence.

The Ministry of Tourism and Sports performs administrative and other tasks related to: the tourism policy of the Republic of Croatia, Tourism Development Strategy; development and investments in tourism; development in special interest tourism, takes measures to improve the quality of the overall tourist offer in the country; carries out the categorization of catering facilities; introduces international quality standards in tourism, and especially in catering; monitors and analyses the operations of the overall tourism industry; realizes international cooperation in tourism etc.

The Ministry of the Sea, Transport and Infrastructure performs administrative and other tasks related to domestic international maritime, nautical, road, rail, air and postal traffic; the system of transport by cable cars, funiculars and lifts and transport on inland waters with the infrastructure of these modes of transport; planning, drafting and implementation of strategic documents and transport infrastructure projects, proposes a strategy for the development of all types of transport etc.

County performs tasks of regional significance:

- education,
- health,
- spatial and urban planning,
- economic development,
- traffic and traffic infrastructure,

- planning and development of the network of educational, health, social and cultural institutions.

In Zadar County there are two administrative departments who are in charge of tourism and mobility (Law on Local and Regional Self-Government, 2019):

- Administrative Department for economy, tourism, infrastructure and EU funds
- Administrative Department for Maritime Property, Sea and Transport

Cities perform tasks of local importance that directly meet the needs of citizens, and which are not assigned to state bodies, especially tasks related to:

- settlement arrangement and housing;
- spatial and urban planning;
- communal economy;
- culture, physical culture and sports;
- protection and improvement of the natural environment;
- fire and civil protection;
- traffic in its area;
- and other activities in accordance with special laws.

The City of Zadar have two administrative departments related to the tourism and mobility (Law on Local and Regional Self-Government, 2019):

- Administrative Department for Economy, Crafts and Development of the Island performs activities in cooperation with the tourist community, taking measures to improve tourist offers and tourist promotions of the city of Zadar and proposing the regulation of working hours of catering facilities,
- Administrative Department for Physical Planning and Construction. The Department of Transport System Construction conducts administrative and other professional activities related to the construction of parts of the transport system invested by the City of Zadar.

3.4.5 National cooperation schemes and action plans for sustainable tourism and mobility promotion

As previously indicated, Croatian National Tourist Board (HTZ) is in charge of promoting tourism in the Republic of Croatia. No matter at what level they operate, the goals of all tourist boards are as follows:

- encouraging the development and improvement of the existing tourist product for the area in which they are established;
- promotion of the tourist product;
- raising awareness of the importance of tourism and the need to preserve the environment. (Ćorluka, 2019).

For the purposes of this report, it is important to emphasize that Croatian National Tourist Board puts a specific focus on modern trends that emphasize the value of creation of sustainable tourism product. The mentioned goals of Croatian National Tourist Board clearly demonstrate the holistic and integrated approach applied - all the various impacts of tourism are considered in its planning and development. This way, tourism in Croatia would be well balanced and integrated with a whole range of activities that affect society and the environment. By doing so, all three pillars of sustainable development (socio-cultural, economic & environmental) will be equally included when contemplating about promotion of identity and reputation of Croatian tourism. Consequently, principles of sustainability to a certain extent define

promotional activities in the country and abroad considering common interest of all tourism entities, while raising the quality of the entire Croatian tourist offer (Ćorluka, 2019).

There is a special section on the website of the Croatian National Tourist Board that promotes cycling. Croatia is overflowing with contrasting landscapes extremely suitable and attractive for discovering and exploration by bicycle. If you decide to experience this abundance of natural and cultural-historical beauty by bicycle, you cannot go wrong.

All the further information about this special section could be retrieved from: <https://croatia.hr/en-GB/experiences/active/cycling>.

3.5 National policies, strategies and action plans for sustainable tourism and mobility promotion: Montenegro

3.5.1 Brief introduction. Tourism in Montenegro

Tourism in Montenegro is directly contributing over 11% of GDP, while total contribution is estimated to be over 21% of GDP. Total number of tourist arrivals in 2019 was 2 645 217, while total number of overnights was 14 455 920.

In 2019, tourists realised 20.0% more arrivals compared to 2018, while the number of realised overnight stays increased by 11.8%. Overnight stays of foreign tourists represent 96.4%, while the domestic tourists represent 3.6% of all overnight stays. Concerning the structure of overnight stays of foreign tourist, in 2019, the most of them were realized by tourists from Russian Federation (24.9%), Serbia (21.4%), Bosnia and Herzegovina (8.5%), Kosovo (5.4%), Germany (4.6%), Ukraine (3.3%), France (3.1%) and United Kingdom (3.0%). Tourists from other countries realised 25.8% overnight stays. Concerning the structure of overnight stays by type of resort, in 2019, most of them were realised in seaside resorts (94.9%), capital (2.1%), mountain resorts (1.8%) and other tourist resorts (1.2%).

Key characteristic of Montenegrin tourism are: dominant concentration of tourist at the coastal area followed by seasonal concentrations in summer months, focus on regional markets, key product is still "3S", while experiencing steady increase of arrivals in the last decade (2009-2019).

More data available at: <https://www.monstat.org/eng/page.php?id=43&pageid=43>.

In terms of nautical tourism, in 2019, the total of 4 775 foreign vessels for entertainment, sport or recreation entered the internal sea waters of Montenegro which indicates an increase of 1.4% in comparison with 2018. Of the total, there were 4 211 vessels which arrived by sea and 564 vessels which were transported by land. By type of foreign vessels for entertainment, sport or recreation in the internal sea waters of Montenegro, there were the largest number of arrivals of sailboats (39.9%), motor yachts (33.7%) and other vessels (26.4%). Number of persons arrived on these vessels in 2019 was 28 562, which is an increase of 3.2% in comparison with 2018. By citizenship, the largest number of arrived persons on these vessels was from: Great Britain (10.8%), USA (5.7%), Croatia (5.7%), Italy (4.9%), Germany (4.2%), France (3.9%) and other countries (64.8%).

In context of this report, nautical tourism and sea transport is in increase and represents an important mobility option as well as increasing significant tourism product for Montenegro and Tivat. Municipality of Tivat has on its territory two big marina complexes, Porto Montenegro and Luštica Bay, followed by many smaller facilities and objects.

More data available at: <https://www.monstat.org/eng/page.php?id=455&pageid=455>.

In area of cruising industry, in 2019, foreign vessels realised 490 cruises in Montenegro. Total of 649 038 passengers arrived during these cruises. In comparison with 2018, the number of cruises increased by 15.6%, while the number of passengers on these cruises increased by 28.2%. By flag of vessels, the structure of foreign vessels on cruise entered internal sea waters of Montenegro in 2019 was the following: Malta (25.1%), Bahamas (23.1%), Panama (16.1%), Belgium (7.3%), Croatia (5.9%), Italy (5.9%), Bermuda (4.9%), Netherlands (2.9%) etc. most of arrivals has been realized in Kotor Port. Due to its vicinity to Tivat, this industry represents booming segment for shore excursions development in Tivat area (e.g. Gornja Lastva, Luštica Bay, Salina, Porto Montenegro etc.).

More data available at: <https://www.monstat.org/eng/page.php?id=500&pageid=43>.

3.5.2 National legislative framework and key actors

National legislative framework is regulated by the Law on Tourism and Hospitality (Official Gazette of Montenegro 2/18, 04/18, 13/18 and 25/19). This Law regulates the conditions for the performance of tourism and hospitality activities and other matters of importance for tourism and hospitality. According to this law, tourism activity means the provision of services by: tourist agencies, tourist guides, tourist escorts, event organizers or representatives in cultural, nautical, rural/country, health, religious, congress, sport, youth, hunting, fishing, sports, recreational or adventure tourism, ecotourism or other forms of tourism, in bathing areas or on ski slopes, as well as the provision of other services under this Law.

Key principles of the law defined in article 3 are: planning and implementing of tourism development policy; sustainable development of tourism based on the compatibility of the interests of economic development and the need to protect the environment and its resources, with adjustment to climate change by the continuous mitigation of the negative consequences of climate change; integrated development of tourism and related activities, as factors of overall economic and social development, which ensures the implementation of mutually aligned plans and programmes in accordance with the law; increased efficiency and accountability in the fields of utilization, management, protection and improvement of the area of tourism; ensuring uniform standards for the provision of services in tourism; protection of the users of tourism products and providers of tourism services; partnership between the private and public sectors and civil society in planning, shaping and placing tourism products on the market; ensuring unique, public and electronic records of registered and recorded data in the field of tourism and hospitality and the electronic exchange of data in conducting business activities.

More data available at:
<http://www.mrt.gov.me/rubrike/zakonska-regulativa/106419/Zakonska-regulativa-iz-oblasti-turizma.html>.

Other important tourism regulation includes: law on tourism organizations, law on residence tax, law on skiing, law on rafting, law on mountain trails etc.

More details available at:
<http://www.mrt.gov.me/rubrike/zakonska-regulativa/106419/Zakonska-regulativa-iz-oblasti-turizma.html>.

Key actors in tourism and mobility area are: Ministry of sustainable development and tourism, Ministry of transport and maritime affairs, National tourism organization, Chamber of commerce, Montenegrin tourism association etc.

- National governance level in tourism and mobility area, represented by government and relevant ministries, is responsible for: strategy and policy for tourism and transport development, integrated planning and development of tourism and related activities, categorization of tourist sites, promotion of tourism in the country and abroad, property and legal affairs in tourism, inspection etc.

More details about Ministry of sustainable development and tourism are available at:
<http://www.mrt.gov.me/ministarstvo/djelatnosti/133935/Djelokrug-rada-Ministarstva-odrzivog-razvoja-i-turizma.html>; <http://www.mrt.gov.me/en/ministry?alphabet=lat>.

Also, more details about Ministry of transport and maritime affairs are available at:
<http://www.msp.gov.me/en/ministry?alphabet=lat>.

Ministry of sustainable development and tourism is organized through following departments/directorates:

- Directorate for Spatial Planning
- Directorate of the Chief State Architect

- Directorate for Construction
 - Directorate for Inspection Affairs
 - Directorate for Competitiveness Development and Investments in Tourism
 - Directorate for the Development of Tourist Destination and Tourist Infrastructure
 - Directorate for Monitoring Tourism Flows and Tourism Turnover
 - Directorate for Housing Development
 - Directorate for Environment
 - Directorate for Waste Management and Utility Development
 - Directorate for Climate Change
 - Directorate for EU Integration and International Cooperation
 - Directorate for Valorization of Tourism Locations
 - Minister's Office
 - Department for Internal Audit
 - Department for General Affairs, Human Resources, Finance, Logistic and Technical Support
- National tourism organization (NTO) plans and carries out the tourism informational and promotional activities of Montenegro both in the country and abroad, create the annual program for informational and promotional activities of the state; follow and analyse trends on the domestic and international tourism markets and carry out tracking studies; create the conditions and provide the means for affirmation of tourism values and potentials by way of publications, exhibits at tourism shows, presentations etc.; create and develop a tourism information system in Montenegro and enable it to be connected with other information systems in the country and abroad; co-ordinate and unite the informational and promotional activities of all tourism subjects and co-operate with tourism organizations in the country and abroad.

More data available at:
www.montenegro.travel/en/objects/national-tourism-organisation-of-montenegro.

- Chamber of Economy of Montenegro is a business association that represents interests of all businessmen for the economic and overall development of the state of Montenegro. Key activities of the Chamber are: ensures realization and enhancement of common interests of its members; creates a favourable ambient for development of market economy; participates in the development of the EU association programs; provides assistance to its members in introducing EU standards; works on education and training of staff, corresponding to the economy's demand; provides information to its members with a view of finding potential partners in the international market and establishing contacts with international partners; develops information system and business connections; organizes activities in the area of foreign economic relations focused on the promotion of goods and services, economic propaganda, organization of fairs, development of foreign trade network, and realization of foreign trade activities; provides information to economic entities with regard to services of introduction of the QMS and its implementation in practice; provides assistance to its members in peaceful settlement of disputes through the Courts that are established within the Chamber, as independent bodies characterized by an independent decision making. Tourism and transport sectors are represented individually as association within the chamber.

More details about Chamber available at: <https://www.privrednakomora.me/en/about-chamber>.

- Montenegrin Tourism Association (CTU-Crnogorsko turističko udruženje) is a association of professionals and includes following stakeholders: hotels, tour-operators and agencies, restaurants,

private accommodation, transport operators (including all transport modes), tour guides, camps, NGOs related to the tourism sector. More details about CTU at: <http://www.ctu-montenegro.org/en>.

- Other significant actors in sector of tourism and mobility are as follows: “Morsko dobro” Agency, “Skijališta Crne Gore” Agency, University of Montenegro-Faculty of Tourism and Hotel Management, Scientific-Technological Park – Technopolis etc.

3.5.3 National policies and strategies on tourism and sustainable mobility

Key document that regulates tourism development is Montenegro tourism development strategy (to 2020). According to strategy, By 2020, Montenegro is a destination with all-year-round tourism, with picturesque landscapes and protected biodiversity. Its brand name and statement “Montenegro – Wild Beauty” is not only justified by offering its visitors a look of the unmatched pristine nature. It equally offers diversity and high quality aimed to meet the demands of each individual visitor.

Montenegro boasts diverse high-quality hotels, resorts and other accommodation facilities. They are all internationally competitive and specialised in their target niche in line with the prevailing market trends. Apart from remarkable beaches, Montenegro is known for its unique national parks and nature parks, and an extensive network of panoramic roads for visitors coming by cars and a network of wilderness hiking and biking trails. This network covers the whole country offering to visitors a unique experience and offers to the local population the opportunities for additional income generation. The sophisticated nautical, health and wellness facilities, winter sports and golf entice high-yield guests and strengthen its international reputation.

The diversified products, high standards, training and services quality, offered at still competitive prices have greatly increased employment, personal income and living standards. At the same time, the strategy of consistent quality will reduce the strain in July and August. Montenegro is oriented towards up-scale markets with strictly protected natural and cultural features guaranteeing the appeal of the country in future and the preservation of resources for future generations. For a while already the supply and waste infrastructure will have been aligned with EU standards, and tourism will have constantly been strengthening its standing as a generator of jobs and taxes, stimulating most other sectors of Montenegrin economy.

More data available in: Montenegro tourism development strategy to 2020 www.mrt.gov.me/rubrike/planska-dokumentacija.

In terms of tourism development, Tivat is included in Cluster 3: Boka Kotorska Bay. Cluster 3 is a high-yield destination for all-year-round individual and package tourism. Accommodation sector is represented by top hotels and small family hotels at a 3–5-star quality standard. A DEG development scheme has been drawn up for the Boka Kotorska with thoroughly planned pilot projects for different target groups. The region is aligned solely to touristic requirements and needs. The focus is on nautical – yachting tourism, health with light fitness activities, demanding but also challenging sports such as sailing, diving, rowing, mountain biking and hiking, cultural programmes, events and festivals. Biking and hiking trails will be developed from Herceg Novi, Kotor, Tivat and Budva into the hinterland and onto the Luštica peninsula to extend the season.

In terms of mobility, according to strategy, the easy accessibility of a destination counts as one of the key success factors for its tourism sector, ‘easy’ meaning fast, convenient and cheap. Visitors from the neighbouring markets can reach Montenegro, even by road, relatively easily in a day. With minor deficits, the road and train connections to Belgrade are acceptable. Projects are underway to improve transport links further (Bar–Boljari motorway, section of the Adriatic-Ionian highway). This issue is regulated by Measure

1.1: Improve transport infrastructure within Montenegro within Objective 1: Create required tourism and accompanying infrastructure for attaining the strategic goal.

More details at: <http://www.mrt.gov.me/rubrike/planska-dokumentacija>

3.5.4 Multi-level governance and competences on sustainable tourism and mobility

Governance levels in Montenegro includes two level: national and local. National level in tourism and transport area, represented by government and relevant ministries, is responsible for: strategy and policy for tourism and transport development, integrated planning and development of tourism and related activities, categorization of tourist sites, promotion of tourism in the country and abroad, property and legal affairs in tourism, inspection etc.

More details about Ministry of sustainable development and tourism at: <http://www.mrt.gov.me/ministarstvo/djelatnosti/133935/Djelokrug-rada-Ministarstva-odrzivog-razvoja-i-turizma.html>; <http://www.mrt.gov.me/en/ministry?alphabet=lat>.

Also, more details about Ministry of transport and maritime affairs at: <http://www.msp.gov.me/en/ministry?alphabet=lat>.

Local level, represented by municipal authorities, is responsible for: adopting programmes and strategies of the state; management and development of a tourist area; application for categorisation of a tourist resort; promotional activities etc.

Local government, in case of Tivat, has very developed structure and consists of: Secretariat for Local Government, Secretariat for Finance and Local Public Revenue, Secretariat for Tourism and Entrepreneurship, Secretariat for Spatial Planning and Sustainable Development, Secretariat for Public Utilities, Transport and Energy Efficiency, Secretariat for Culture and Social Affairs, Secretariat for Youth, Sports and Social Affairs, Secretariat for Property and Assets, Directorate for Investments, Office of the Mayor, Office of the Chief Administrator, Protection and Rescue Service, Communal police, Inspection management, Internal Audit Service, Public Procurement Services and Chief City Architect's service.

This structure explains the organization of activities and responsibilities at local level, where most relevant for tourism and mobility issues, are following: Secretariat for Tourism and Entrepreneurship, Secretariat for Public Utilities, Transport and Energy Efficiency.

More details available at: www.opstinativat.me/en/local-government/local-government/.

3.5.5 National cooperation schemes and action plans for sustainable tourism and mobility promotion

Most developed touristic cooperation schemes and initiatives in Montenegro are those related to thematic routes:

- Cheese Route. The development of the project was helped by Italian and Montenegrin experts and supporting institutions (e.g Ministries of Tourism and Agriculture - Montenegro / Ministries of Environment, Land and Sea - Italy). Route involves 5 farms located in the Kolašin mountains. Each site along the route deals with a specific theme connected to "the world of cheese". Warm-heartedness, unconditional and sincere hospitality, simplicity, feeling of respectful family values and the past are the qualities you will find visiting the producers at the cheese farms. The main objective of the Cheese Route is to employ an innovative marketing strategy in order to increase the value generated by milk

processing and products distribution through a better visibility of the whole sector and the differentiated offer.

- Ethno-gastronomic Route. This project was implemented with the assistance of the EU under the IPA cross-border programme, by CERAI (Centre for Rural Studies and International Agriculture - Spain), PRC (Permaculture Resource Centre – Albania) and CSTI (Centre for Sustainable Tourism Initiatives – Montenegro). Trail has brought together tradition, nature, crafts and hospitality from Lake Skadar located on the border between Albania and Montenegro. It involves 31 members from Montenegro and 27 members from Albania. Its cross-border character offers unique opportunity to valorise natural and cultural heritage of Lake Skadar and whole surrounding rural area.
- Ham Trail Njeguši. Small village of Njeguši, located in Lovćen mountain massif, is very important historical site connected with Montenegrin royal dynasty Petrović Njegoš. Apart from that, this place is famous for its delicacies – smoked ham and cheese. This theme trail involves different actors: smokehouses and factories, cheese making facilities, national restaurants, accommodation facilities, hiking or horse riding offers and other activities and attractions. Although relatively small, this cluster could be classified as most developed with the highest level of internal and external cooperation, comparing to other trails in Montenegro.
- Honey Trails and Tales. It involves 8 beekeeping places, located in area of Cetinje municipality. This micro-cluster is quite attractive and offers a great number of activities and attractions (hiking trails, biking and sailing, wine cellars, outdoor exhibitions, fishing villages). The project is implemented by GTZ, NTO and LTO.
- Old Royal Montenegro Trails. This trail is implemented by CSTI and involves 12 businesses, all of them family owned, such as: accommodation facilities, cheese producers, wine producers, olive oil producers, prosciutto producers and honey producers. The project is funded by GTZ and Ministry of Sustainable Development and Tourism.
- Olive Trail. This project was implemented, with the assistance of EU under the IPA cross-border programme between Montenegro and Croatia, by SNV (Dutch Development Agency), Croatian Centre for Agriculture, Food and Village – Croatia. The trail is based on the authentic production of olive oil and involves 52 small family businesses from Dubrovnik-Neretva County (Croatia) and 35 from Boka Bay and Bar (Montenegro). Its cross-border character offers great potentials for future development. Thanks to its locations on the south of Montenegro and around the area of Dubrovnik, this Trail is expected to be the most profitable in the future.
- Via Dinarica. This project was implemented with the assistance of EU under the IPA cross-border programme between Montenegro and Bosnia and Herzegovina (BiH), by CSTI – Montenegro, and KES Limit – BiH. It involves 60 important points of interest in Montenegro and 43 in BiH. Via Dinarica is a route that passes through the most attractive mountain areas of the Dinaric Alps. Via Dinarica promotes tourism for the purpose of economic development of the region, while preserving the environment and respecting the socio-cultural diversity and authenticity of local communities. This Route is the largest one and covers the area of Durmitor National Park and involves more than 100 local businesses from each side of border. Its cross-border character is a very convenient platform for creating attractive nature-based products and visitor experiences.
- Wine Trail. The project is implemented by GTZ, NTO and LTOs (Cetinje, Bar and Podgorica). It involves 33 wine producers, mostly from the area of Lake Skadar. The Wine Trail is very convenient for hikers and cyclists and it is promoted together with other attractions and activities in the area. Most of the members provide short visits and wine tasting, but the accommodation offer is still limited. This Trail is one of the most important for regional and rural development, and further support is needed in order to provide more tourists visits and income.

Another interesting initiative was organized in Montenegro in area of “low carbon” tourism. Actually, Towards Carbon Neutral Tourism Project, implemented by Ministry of Sustainable Development and Tourism and United Nations Development Programme (UNDP Montenegro), in cooperation with National Tourism Organization, supports introduction of environmental certificates EU Eco Label and Travelife for hotels and apartments. Eco certified accommodations attract ecologically conscious guests who care for protection of environment. Certificates were issued upon audit on alignment of 22 mandatory criteria and certain number of points collected based on 43 facultative criteria. Certificate confirm implementation of environmental concept, rational energy use, water use reduction, preservation of the natural surroundings, promotion of sustainable transport and reduction of generated waste. It is worth to highlight permanent communication and promotion at the level of the accommodation, as well as cooperation with guests, businesses, suppliers and other partners in pursuing ecological vision. EU Eco Label, established 25 years ago, facilitates promotion of products and services to the 500 million people market, which includes some of the most important travel markets, such as Germany, France, Benelux and Scandinavian states.

More information about the project and means of support can be found on project web page: www.lowcarbonmne.me.

Other significant cooperation schemes are:

- Blue flag - The Blue Flag program has been implemented in Montenegro since 2003 when the NGO "EKOM" became an associate member of the Foundation for Environmental Education and thus gained the right to be the National Operator for Montenegro. JP Morsko Dobro immediately recognized the importance of the Blue Flag and, from the very beginning, became the general sponsor and patron of the Program, which is one of the most important activities related to the responsible management of the coast and beaches. The Blue Flag is an internationally accepted and recognizable symbol of high standards in tourism and environmental protection awarded to beaches and marinas that meet 32 program criteria in four areas. A bathing area gains its Blue Flag label based on seawater quality, beach services and safety, environmental standards, and education and awareness-raising among the public about the ecological values of the sea and the coast. The Blue Flag is awarded for the current season. It is based on the results from the previous one, which is judged by the National Commission consisting of representatives of the Ministry of Sustainable Development and Tourism, Public Company Morsko Dobro, Red Cross of Montenegro, Port Authority, and environmental NGOs.

More details at: <https://www.total-montenegro-news.com/lifestyle/5603-blue-flag>

- “Dobro iz Crne Gore” - The Chamber of Economy of Montenegro launched a project in 2008 regarding visual labeling of Montenegrin products " Good from Montenegro". It is based on the results of the analysis carried out by the Chamber of Economy on trade exchange of Montenegro with foreign countries during the last few years. The analysis showed substantial, continuous and increasing foreign trade deficit in trade and service exchange. Registration of the collective trademark GOOD FROM MONTENEGRO, as well as the overall activities (analysis and campaign), shall be implement by the Chamber of Economy of Montenegro in order to produce the following effects: to promote domestic resources and stimulate their use, to develop domestic production, to increase export, new investments, new jobs, to strengthen the identity of the State through promoting traditional values (products and services) in tourist facilities, basic economic and social development of Montenegro. The basic goal of registration of collective trademark GOOD FROM MONTENEGRO includes distinctiveness, quality and successful placement on domestic and foreign market.

More details at: <http://www.privrednakomora.me/dobro>

- Panoramic roads around Montenegro. Montenegro's panoramic roads will take you on a journey through the varied landscape, culture and nature of this small, lovable country. On the four different routes

between the beautiful Adriatic coast and the wild and romantic mountains of the north there is a lot to discover. Connecting routes also make it possible to take shortcuts or connect several panoramic roads. No matter if you are travelling by car, motorbike or camper: Discover Montenegro on your own on an ultimate road trip. All panoramic roads are fully signposted and free maps are available at the local tourist organisations. You can also discover the panoramic roads "Durmitor Ring" and "The Circuit around Korita" with a free audio guide on your smartphone.

More details at: www.montenegro.travel/en/info/panoramic-roads-around-montenegro

3.6 National policies, strategies and action plans for sustainable tourism and mobility promotion: Albania

3.6.1 Brief introduction. Tourism in Albania

Tourism is increasingly crystallizing as one of the main engines of the country's economic development. According to the Economic Impact Report of 2018 of the World Travel and Tourism Council¹ (WTTC), along 2017, the tourism sector recorded a direct contribution of \$ 1.12bn, accounting for about 8.5% of the Gross Domestic Product (GDP) while including indirect multiplier effects, total contribution is almost three times higher than \$ 3.47 billion, accounting for about 26.2% of the GDP, positioning this sector as one of the main contributors to the development of the national economy.

Meanwhile, the sector's contribution to the economy is projected to grow significantly over the next 10 years, with the tourism sector expected to account for only 8.8% of the GDP in the next 2-3 years, while by 2028, the sector may reach 9.3% of the GDP. Thus, taking into account this upward trend, it is projected that by 2028 the direct and indirect effect of the tourism sector will reach approximately 1/3 of Albania's total GDP.

Also, in terms of employment, currently the tourism sector employs about 7.7% of the total labor force in Albania, while by 2028 this number is projected to grow to 8.8%. Referring to the same report of the World Council on Travel and Tourism (WTTC), investments in this sector accounted for about 7.5% of all investments in the country, while by 2028 this figure is projected to rise to 8.2%.

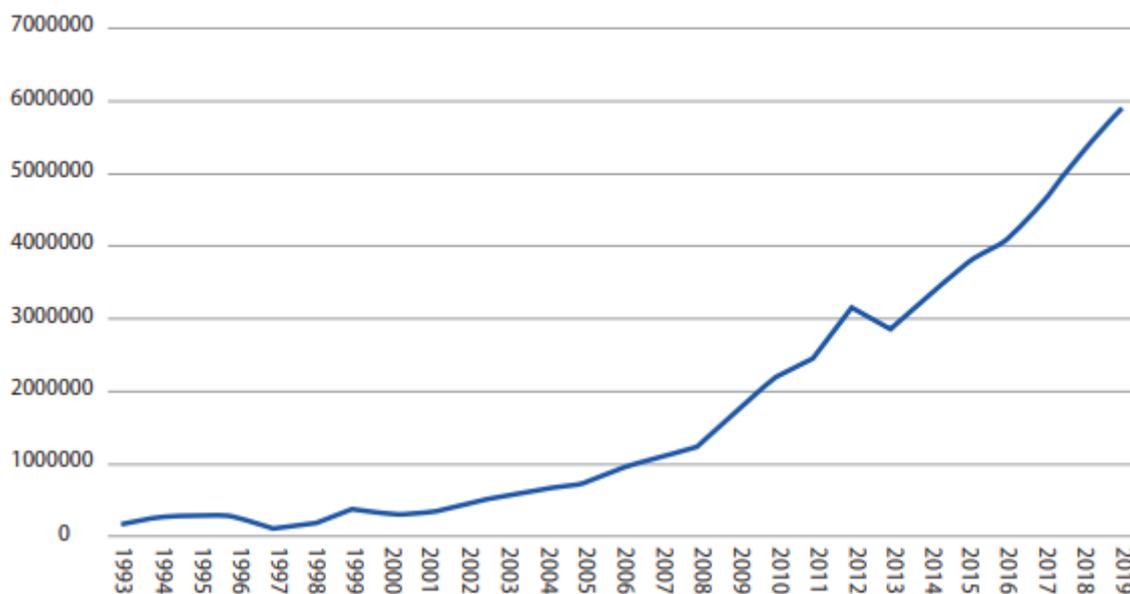


Figure 3.6.1: Tourists number in Albania from 1993 to 2019. Source: Institute of Statistics and World Bank



As shown in Figure 3.6.1, the number of tourists in Albania has shown a *continuous* notable increase the past decades. Europe is the main source of tourists visiting Albania taking up a volume of about 92.4% of all tourists, which reflects that the access >3 hours from one destination to another is still an important factor for the influx of travelers for tourism purposes. However, recently tourists from the United States of

America, or Asia, and especially China, have shown a significant increasing interest, thus indirectly encouraging the development of other tourism sub-sectors, especially the historical and cultural tourism. Figure 3.6.2 provides an overall view of the main statistics related to tourism in Albania

However, compared to other Mediterranean countries, the development of tourism in Albania is still far from the potential represented by the country's natural, historical and cultural assets. Infrastructure, accommodation capacities, quality of services, the tourism offer and product are all factors that have somewhat inhibited the sustainable and consistent development of tourism in Albania, leaving room for uncontrolled and chaotic development that has actually kept this industry in operation, but endangering its sustainability in the long run

Figure 3.6.2: statistics regarding tourism in Albania

3.6.2 National legislative framework and key actors

The legislative framework concerning tourism development underwent several changes between 1992 and 2019. The first law dedicated to tourism passed in pluralist Albania was Law No. 7665, dated January 21, 1993 'For the development of priority areas in tourism'. The law focused on the 'stimuli' concept, providing definitions on the typology of activities, persons, areas, and structures considered as fundamental in stimulating tourism development in the country.

Further, the law sought to encourage foreign investments based on the provisions of Law No. 7594, dated August 4, 1992 'On Foreign Investments.' In 2007, a law 'On Tourism' was passed defining a regulatory framework for the management of the tourism sector and the development of standards for touristic products and services, among other things. The government was beginning to show increasing support for the development of tourism in 2013-2014, which materialized in the preparation of the sectorial law and the law for strategic investments. In 2015, a new Law No. 93/2015 'On Tourism' was approved, addressing numerous issues raised by the business community and tourism experts and introducing, for the first time, clear definitions of key concepts, procedures, certifications, and licenses for business entities operating in the tourism sector, along with a classification of accommodating structures.

The Law No. 55/2015, 'On Strategic Investments' aimed specifically at increasing investments in strategic sectors, which included energy, agriculture, tourism, and natural resource extraction.

Particularly concerning sustainable tourism development ambitions, the law views these sectors as highly profitable in the long term and suitable for a fast-paced economy because of the low costs, unvalored natural resources, and a flexible work force. The law is expected to create the preconditions required for the attraction and retention of strategic investors and a 'fast track' for the processing and approval of strategic investment projects. A Secretariat of the Strategic Investments Committee (AIDA) is responsible for approving the status of each potential strategic investor and orienting potential investment interest from abroad. The law also foresees the creation of a Register of Strategic Investments where all completed strategic investment projects are listed

The expanding legislative framework in support of tourism development resulted in a number of fiscal and administrative incentives aimed specifically at growth and attracting foreign investments in the sector. Below is provided an overview of the most important legal framework for the tourism and mobility development.

Law No.93/2015 "On Tourism"

This Law substitutes Law No.9734, date 14.05.2007 intended to address several issues raised by the business community and by the experts of tourism sector. The law brought some novelties while comparing it with the previous law, such as:

- *The role and functions of institutions.* Law 93/2015 creates a clear picture of the institutions dealing with the tourism sector both in national and local level by eliminating the overlap of competences among them and the uncertainty it cascaded to the users of the law, mainly to the foreign investors
- *Certification and licensing of operators in the field of tourism.* Previous law did not foresee for licensing of the operators offering touristic activities, which brought poor services to the consumers and at the same time has significantly influenced informality
- *Categorization and Classification of accommodation structures.* Law 93/2015 envisaged the categorization and classification process of the tourism accommodation structures which was missing in the previous law
- *Certification of the touristic guides.* Law 93/2015 provides for the certification of the tourist guides and the respective procedures to be followed aiming to standardize such type of activities
- *Clear obligations for institutions.* Additionally, law 93/2015 sets obligations for main institutions such as MoTE in preparing the following documents:
 - o National Plan on Tourism (NTP);
 - o Strategy of Tourism and Action Plan (Tourism Strategy);
 - o Central Tourism Register;
 - o National Register of Touristic Sources;
 - o National Sites with Priority in Developing Tourism.

Law 114/2017, “On Some Amendments to the Law No.93/2015 “On Tourism”

Through law 114/2017 the CoM made some new provisions on the main law 93/2015 that incite investments of 4- and 5-stars hotels and resorts in the areas of priority for tourism development and their managing through franchising contracts or similar to franchising.

Law 55/2015, “On Strategic Investments”

In an effort to foster investments in strategic sectors, was adopted law 55/2015. The law identifies the country's strategic sectors and provisions detailed and special administrative favorable procedures, facilitating or accelerating support and services to domestic and foreign investors.

The administrative procedures provisioned in this law related to the preparation, implementation, development and realization of a strategic investment project as well as to the issuance of licenses/permits/authorizations and opinions pursuant to this law are of the highest priority and are followed by an accelerated procedure by all the public institutions/entities/public authorities, directly or indirectly involved in these procedures.

In the remainder of this section is provided a complete overview of tourism-related institutions according to the law's provisions and their respective competences.

Ministry of Tourism

Ministry of Tourism performs the following tasks:

- implements the basic principles of sustainable tourism development, in accordance with the provisions of this law and the legal and sub legal acts in force, in cooperation with all stakeholders of the tourism industry;
- establishes and administers the Central Tourism Register and the National Register of Tourist Resources;
- financially supports projects that help develop the tourism field;

- supports, protects and develops tourist resources and promotes tourism products in accordance with the principles of sustainable tourism development and in cooperation with interest groups;
- takes measures for the welfare, protection and promotion of employment in the tourism industry, giving priority to employment of young people;
- promotes, supports and cooperates with public and private institutions in the collection, processing and administration of data in the field of tourism;
- drafts and implements policies for certification and classification systems in accordance with the provisions of this law;
- develops policies for tourism product and marketing in the field of tourism, based on the Tourism Development Strategy and the National Marketing Strategy for the Tourism Sector.

The territorial units of tourism

These are created as an administrative structure of the ministry responsible for tourism. The manner of organization and functioning of the territorial branch of the tourism service is approved by the order of the minister responsible for tourism. The territorial division of the tourism service performs these functions:

- coordinates field work for the implementation of tourism product development policies and tourism destination management;
- advising tourist enterprises to meet the standards and increase the quality of services and tourism products offered;
- provide information on tourism enterprises regarding the legal framework and standards in the field of tourism, and disseminates classification / certification manuals for tourist undertakings;
- cooperate with local authorities and interest groups to provide information in the field of tourism, according to the requirements and tasks given by the structures responsible for tourism;
- collects data and compiles periodic reports, in cooperation with the local government unit tourism officials, who presents it to the responsible structure in the ministry responsible for tourism.

Private Sector Advisory Committee for Tourism

Private Sector Advisory Committee for Tourism (KKSPT) is established as an advisory body for the tourism sector. The KKSPT is chaired by the Minister responsible for tourism and includes representatives from national associations of enterprises operating in or related to tourism, representatives from higher education institutions, chambers of commerce, representatives of associations or NGOs operating in the field of tourism, as well as representatives of inter-national institutions/donors. KKSPT performs the following functions:

- advise the minister responsible for tourism for the development of the Tourism Development Strategy prior to its approval by the Council of Ministers;
- ensures cooperation between the private sector and the ministry responsible for tourism on issues that may arise during tourism development, the implementation of the Tourism Development Strategy and the Action Plan;
- provides information on the performance of the private tourism sector and suggests to the ministry responsible for tourism taking measures on tourism related issues.

National Tourism Agency (NTA)

National Tourism Agency is a public legal entity, under the minister responsible for tourism, which aims to promote Albanian tourism, both inside and outside the country. NTA performs the following tasks:

- implement marketing policies in the field of tourism, promoting Albanian tourism at the national and international level, to create Albania's image as a tourist destination in the international market;
- provide information for visitors, travelers and tourists, for tourist services offered, for tourist products and destinations, for activities and other useful information;
- promote the product and tourist destinations in the country and abroad, cooperating with the regional tourism offices, local government and other organizations operating in the field of tourism;
- promote investments in priority tourism development areas, cooperating with other public investment promotion institutions in the country;
- initiates and promotes tourism projects, according to their field of activity, taking the prior approval of the ministry responsible for tourism.

National Coastal Agency (NCA)

The National Coast Agency is a public legal entity under the responsibility of the minister responsible for tourism, which aims to protect and track the development of the Albanian coastal area. NCA performs the following tasks:

- conservation and sustainable development of the coastal zone;
- implementation of policies and strategies for integrated coastal zone management;
- coordination of programs related to the coastal zone;
- promoting investments in the coastal zone;
- contributing to public information, consultation and access in drafting and implementing policies and strategies related to integrated coastal zone management.

National Tourism Inspectorate (NTI)

National Tourism Inspectorate performs the following tasks:

- controls the implementation of the criteria and conditions of the subjects that exercise tourism activities, in accordance with the provisions of this law, bylaws in its implementation and other legal acts in force;
- controls and inspects the premises where the tourist activity is carried out;
- controls and takes measures for violations found by subjects that exercise tourist activity, in accordance with the provisions of this law;
- Imposes fines and other administrative measures against natural or legal persons when noticing the provisions of this law.

Commission for Standardization of Tourism Activities

For the certification of tourist activities, the commission for the standardization of tourism activities is set up. The manner of organization, functioning and composition of the standardization commission for tourism activities is determined by approved regulations by order of the minister responsible for tourism. The standardization commission for tourism activities is established by order of the minister responsible for tourism.

Regions and Municipalities

Regions and municipalities perform the following tasks:

- create inventory of the main tourism resources of the local government unit and inventory of tourist enterprises at the local level;

- periodically update the inventory of tourist resources, to the minister responsible for tourism in order to establish a database at national level;
- provide support infrastructure for tourism business activities at the regional / local level, enabling standards to be respected by tourism ventures;
- contribute to the development of different types of tourism at the regional / local level, such as cultural tourism, agro tourism, etc., based on tourism resources, playing an active role in diversifying the tourism product, in cooperation with all central and regional or local institutions, such as and interest groups;
- provide information, as part of the tourism statistics system, to the minister responsible for tourism;
- cooperate to take measures to provide primary healthcare services for visitors/ tourists within the jurisdiction of the local government unit, applying the standards set by the ministry responsible for tourism and health;
- take measures to create and maintain a healthy environment within the jurisdiction of their territory, in accordance with the norms and in the implementation of hygiene and sanitary regulations.

3.6.3 National policies and strategies on tourism and sustainable mobility

I. SUSTAINABLE TOURISM

Vision Statement

“Albania, a hospitable, attractive and authentic destination, for sustainable development of country’s economic, natural and social potentials”.

Mission

Development of destinations, areas, products and diversification of tourism offer, as well as increase of the added value of tourism potentials for the economic and social development of the country.

Aim

Albania should be widely promoted in the international community as a worthy destination to compete equally in the global tourism market. Consequently, Albania’s positioning in this market will be based on two pillars of development:

- *Long-term sustainability of public interventions and investments*, to turn the country’s tourism economy into a tourist attraction, a better place to live and a more profitable potential for tourism ventures.
- *Regular protection and development* of geospaces in respect of nature, ecosystems, demographic and urban development in all areas with a potential in tourism development.

Strategic goals

To realize the vision of this strategy, four strategic goals have been identified, which, at the same time, will be the cornerstones of this document. Based on the achievement of each particular and combined specific objective, the realization of each specific and combined product planned in the Action Plan, the achievement of strategic goals will be made possible, the level of realization which will be ensured through a monitoring process between each indicator and the Strategic Goal envisaged.

These strategic goals are as follows

- Creation of new development industries and clusters as well as consolidation of the tourism offer and creation of new products;

- Increasing the added value and impact of the sector on the economy and employment;
- Development of new products and services in tourism, as well as improvement of their quality;
- Improving the image of the country and promoting authentic local products.

Current Institutional Framework in Tourism for the Development and Implementation of Strategies

Tourism industry has increased its contribution to the country's economy both in monetary and employment terms, becoming thus a strategic sector for Albania. In line with this trend there has been an increased focus from the government, donors, financial institutions and private companies in the sector. As of 2015 there has been an increased dynamic in preparing the necessary legal and regulatory framework which is the prerequisite of any investment and sustainable development.

The political commitment for stronger support to the tourism started to materialize through sectoral law and law on strategic investments both approved in 2015, which aimed to bring the sector under the focus of new splash of investments. Additionally, by-laws, CoM decrees, regulations, incentives have been approved from time to time in order to fill the framework and to address the different segments of the tourism chain aiming to bring the sector development and its contribution closer to its potential.

National Strategy for Sustainable Tourism Development 2019 – 2023

The key objective of the national strategy for sustainable tourism is to serve as a framework for turning the tourism sector into one of the strongest competitive pillars of the country, in the region and beyond. Actors and stakeholders will collaborate to build instruments to increase the added value especially for households, develop new tourism products, and significantly improve service, so that together can promote an Albania of healthy values for a better future

National Strategy for Development and Integration 2015-2020 (NSDI)

This document presents the main challenges faced by the sector, including implementation of standards, quality of tourism services and facilities, development of tourism products, lack of collaboration and effective coordination among stake-holders that are or might become integral part of tourism sector. Two strategic objectives for tourism are foreseen in this strategy:

- developing sustainable tourism in the country to contribute in the economic development and employment, by increasing the staying period of foreign tourists and modest increase in the inflow of emigrants and ethnic Albanians; increase direct contribution of tourism in the GDP; and increase direct contribution of tourism in employment;
- setting up an integrated tourism model of cultural, natural and coastal dimensions through the development of a “Branding Albania” Strategy with a logo and unified motto for investments in tourism.

The National General Plan

Defines the main directions of tourism development based on the potentials of the territory. Map of Tourist Potential in this Plan illustrates areas which are classified as Areas of National Importance for the values they carry in the planning and sustainable development of the territory.

Integrated Inter-Sectoral Plan for Coast Area (IIPS)

From the analyses and studies carried out till to date and based on the national development strategies, but also international ones for the future of Mediterranean region, developed for tourism sector and maritime economy, IIPS Coastline considers that the tendency for tourism development in Albania should be focused on these types of tourism: coastal tourism, cultural tourism, natural tourism/eco-tourism, rural tourism, agro-tourism, mountain tourism, adventure tourism (sports) and tourism of health and well-being.

Inter-Sectoral Strategy “Albania’s Digital Agenda 2015-2020”

The document aims to increase the efficiency of the manufacturing sector, agriculture, **tourism** and industry through ICT systems. One of the strategic objectives of the document foresees improvement of ICT infrastructure in the public administration for aligned and integrated developments as per international standards on e-governance in all the sectors (with the aim of inter-connecting at 100% all the systems by the end of 2020).

Inter-Sectoral Strategy for Rural and Agricultural Development 2014-2020

The documents specify the grounds for an integrated planning and aims the development of rural tourism and other activities related to tourism, such as cultural tourism, natural and mountain tourism, wine tourism etc., by reconstructing traditional buildings and houses for business purposes, such as accommodation, food, leisure, trade etc. According to this strategy, achieving the above goals will be made possible by promoting and marketing country’s tourism image as tourist destination of particular interest; diversifying the tourism products by expanding them throughout the country to ensure integrated tourism development; development of certification and standardization systems in tourism to contribute in the quality improvement of services and products in the sector.

Transport Strategy

The strategy is accompanied by an action plan, based on the pillars: Blue Growth, Regional Connectivity (transport and energy network), Environmental Quality and Sustainable Tourism. An integrated combined tourism model of coastal (beaches and sun), cultural (archaeology, heritage) and natural (eco-tourism) dimensions is supported mainly on an efficient network of roads that can connect every corner of the country.

Business and Investment Development Strategy 2014-2020

Increase of foreign investments is a key objective for the economic development of the country and a strategic priority of the government. Foreign investments are important in many directions while the performance of investments affects the country’s economic and social progress

II. SUSTAINABLE MOBILITY / TRANSPORT

Government of Albania adopted the Sectorial Strategy of Transport and Action Plan 2016-2020. The main goal of the strategy is to have an efficient transport system, integrated in the region and in the EU network, which promotes economic development and upgrades the citizens’ quality of life. The overall objective of the National Transport Strategy and Action Plan 2016-2020 is to (i) further develop Albania’s national transport system, and in addition (ii) to significantly improve its sustainability, interconnectivity, interoperability and integration with the international and European wider transport system and region.

The Transport strategy includes the Transport Action Plan 2016-2020, listing the strategic priority actions and identifying the related list of tasks. The priorities are designed to address the main challenges as well as the weaknesses in the sector, and are listed below:

- increase the transport sector governance to provide better transport services to citizens and businesses alike;
- develop and implement measures to improving the utilization rate of transport infrastructure by removal of physical and non-physical bottlenecks and unnecessary technical cross border barriers;
- ensure harmonization with the EU transport regulatory framework for creating common market conditions and safety standards at national level and within the neighboring region;

- develop co-modal solutions by optimization of individual transport modes and focus on energy- efficient and environmentally friendly transport modes;
- introduce measures for reducing energy consumption and costs per unit of transport service;
- put forward measures to improve the ratio of railway and waterborne transport, foster liberalization of railway services and open the rail transport market to competition;
- increase the use of Intelligent Transport Systems in the transport sector.

3.6.4 Multi-level governance and competences on sustainable tourism and mobility

This section provides an overview of the organizational structure of tourism and mobility in regard with multi-level governance and competences. Tourism management and development is achieved through 3 *levels* of governance. In particular:

Central level

The central government is responsible for:

- The overall policy;
- Inter-ministerial Tourism Committee;
- Advisory Committee on Private Sector Tourism;
- National Tourism Agency;
- The Action Plan, including awareness and marketing; product development; investments; human resources; assessment; data management.
- Sustainable tourism in collaboration with all stakeholders of the tourism industry;
- Developing and submitting for approval at Territory National Council, the National Plan Tourism and ensure its implementation;
- Developing and submitting for approval at Council of Ministers, strategy development for tourism and action plan
- Managing the Central Registry Tourism and National Resource Registry supporting and cooperating with groups in market research process regarding resources and tourist products
- Financially support projects
- Take measures for the maintenance, protection and promotion of employment in the tourism
- Industry by giving priority to youth employment;
- Promote, support and cooperate with public and private institutions in the collection,
- Processing and management of tourism data
- Coordinating enforcement of legal provisions, including conventions and international
- Agreements in the field of tourism;
- Cooperating with international organizations operating tourism programs
- Proposing to the National Council of Territory priority development areas
- Cooperating with the competent authorities and ensuring the safety and protection of visitors, domestic or foreign and promoting and monitoring the implementation of the Code of Global Ethics in Tourism;

The responsible ministries/bodies are:

- Ministry of Economic Development, Tourism, Trade and Entrepreneurship;

- Private Sector Advisory Committee;
- Agencies and Inspectorates named under Law. 93/2015.

Regional level

District representatives and representatives of associations are responsible for:

- Provide a forum to address issues related or arising from tourist activities
- Provide a forum for cooperation, between local government, ministry responsible for tourism and other institutions at the local level, to discuss the issues that arise in the field of tourism development, the implementation of national policy and other issues in a related field;
- The Committee shall meet at least twice a year and any other required by the mayor.

The responsible bodies are:

- Region representative;
- Prefect.

Local level

Local authorities are responsible for:

- The inventory on the main tourist resources;
- The inventory of tourism businesses;
- Technical assistance;
- Propositions to institutions;
- Establishing an inventory of key resources;
- Providing support for infrastructure and business activities in the Tourism sector at the local level;
- Ensuring compliance of local businesses with Tourism law and policy;
- Contribute to the development of various kinds of local tourism, such as cultural tourism, agri-tourism etc.;
- Playing an active role in diversifying tourism products, in collaboration with all Central and local institutions and stakeholder;
- Provide information for tourism statistics;
- Cooperating on measures to provide health care services for visitors / tourists, within the Jurisdiction of local government unit, by applying standards defined by the Ministry responsible for tourism;
- Take measures to establish and maintain a healthy environment within the jurisdiction of their territory.

The responsible bodies are:

- Municipalities.

The transport and mobility services are also achieved through the following governance system. In particular:

Central level

The central government is responsible for:

- The preparation and implementation of the overall policy, in accordance with European standards and further aligning transport policy with EU legislation;

- National and international scale infrastructures;
- Road transport;
- Railway;
- Maritime transport;
- Air transport;
- Telecommunications;
- Monitoring frameworks across Road, Maritime, Rail and Air sectors;
- Funding.

The responsible bodies are:

- Ministry of Transport and Infrastructure.

Local / regional authorities

Local and Regional authorities are responsible for:

- The development of local and regional infrastructure, including roads;
- The provision of local and regional road services;
- Local and regional transport.

3.6.5 National cooperation schemes and action plans for sustainable tourism and mobility promotion

In June 2019, the Government of Albania approved the ‘Strategy of Sustainable Tourism Development in Albania 2019- 2023’ (GoA, 2019). This constitutes a positive first step towards the management of the sector. The responsibility conferred to this document is significant, given the role it has in orienting the development of one of the strategic priority sectors crucial to the economic development of the country.

The main areas of focus for the development of sustainable tourism and mobility are the following:

- Product development (diversification of tourist offer);
- Development of human resources (improvement of the quality of services);
- Marketing (promotion of Albania as a destination for all-year tourism);
- Private and public investments;
- Policy framework and destination management.

Incentivizing Policies For Tourism Sector

Below is provided an updated information of the incentives for tourism sector as provided under current primary or secondary legislation.

Administrative incentives to reduce administrative burden

The “Assisted procedure” is the administrative procedure provided for in the law no.55/2015 under which the public administration follows, coordinates, assists, supervises and, if appropriate, represents a strategic investment during its implementation phases.

The specific procedures facilitated to the investor are the following:

- completion of preparatory actions, preparation of documents and administrative application in an expedited procedure;

- priority handling of documentation preparation, provision of opinions or employment of procedures which are included in the area of activity of the state administration bodies, for the preparation and implementation of the strategic investment.

Fiscal incentives to attract quality investments

- *VAT reduction* for accommodation structures from 20% to 6%. Reduced rate of value added tax applies to the provision of accommodation services in accommodation structures;
- *Exemption from corporate tax* for a 10-year period, for accommodations structures, 4* and 5* hotel/resort;
- *Exemption from the building tax* for accommodations structures, 4* and 5* hotel/resort;
- *Exemption from tax on impact on infrastructure* for accommodations structures, 4* and 5* hotel/resort.

Incentives for agro-tourism as a growth industry

- *VAT reduction* for accommodations structures certified as “agro-tourism entities” from 20% to 6%. The reduced VAT is applicable as of 1 January 2019 for accommodation and restaurant structures certified according to the criteria for agro tourism;
- *Corporate income tax* to be reduced from 15% to 5%., change applicable as of 1 January 2019 for taxpayers certified “agro-tourism entities”;
- *Exemption from tax on impact on infrastructure* for “agro-tourism entities” which shall perform investments in their scope.

Other incentives

- **Law no. 93/2015**, dated 27.07.2015 "On tourism", provides for a number of facilities/support for investments in priority areas for tourism development such as:
 - o The disposal of state immovable property;
 - o Establishing of touristic ports or permanent pits serving as supporting infrastructure for tourist structures;
 - o Disposal of beach areas for investments near the shores of the sea or lake.
- **Integrated Rural Development Program (PIZHR)** - The program of 100 villages aims to coordinate the development interventions in the rural areas of 100 villages. The integrated rural development approach will target measurable objectives for the development of rural space, through centralized focus (integrated and coordinated programming) of public investment, donor and private investment, in the well-defined space of 100 villages, with high potential for economic and social development, agro-tourism and rural tourism, nature and environment as well as cultural heritage.

3.7 National policies, strategies and action plans for sustainable tourism and mobility promotion: Serbia

3.7.1 Brief introduction. Tourism in Serbia

In 2017, tourism's direct contribution to GDP was 0.9%, and this was expected to increase by 2.3% in 2018 to a total of RSD 104.8 billion. The total contribution of the tourism industry to the Serbian economy, including the effects from investment, supply chain and induced income impacts, amounted to RSD 294.6 billion in 2017, or 6.7% of GDP, and was expected to have grown by 2.7% to RSD 302.5 billion in 2018. The tourism industry directly generated 32 000 jobs in the Republic of Serbia in 2017, representing 1.8% of the country's total employment. The industry attracted capital investment of RSD 33.8 billion, 4.1% of total national investment. This is expected to rise by 2% over the next ten years to RSD 43.5 billion by 2028.

The total number of tourist arrivals in 2018 was 3.4 million, an increase of 11.2% from 2017. International arrivals accounted for 49.9% of total arrivals, and showed a 14.2% increase on 2017. Domestic arrivals increased by 8.3% in 2018 compared to 2017. The key source markets for international arrivals in 2018 were Bosnia and Herzegovina (15.4% market share), Montenegro (12.3%), and China (10.5%), followed closely by Croatia and Turkey. All of the five top markets showed growth in volume of arrivals between 2017 and 2018, particularly China which showed an increase of 89%.

(Source: OECD 2020:

<https://www.oecd-ilibrary.org/docserver/6b47b985-en.pdf?expires=1609278380&id=id&accname=guest&checksum=C900927894EC452A9211E9779BB1A836>)

3.7.2 National legislative framework and key actors

The Ministry of Trade, Tourism and Telecommunications is the national government authority overseeing tourism in Serbia. The Ministry has jurisdiction over the Tourism Organisation of Serbia (TOS), which is the national agency for promoting tourism in the country and abroad. The TOS also undertakes tourism market research and collects relevant tourism information. Founded as a government organisation in 1994, the aim of the TOS is to affirm the value and potential of the country's tourist industry. Its activities focus on positioning Serbian tourism in both domestic and international markets, and evaluating the comparative advantages of tourism in Serbia, such as geographical location and historical, cultural and natural identity.

Three Regional Tourism Organisations have been established, as well as 116 Local Tourism Organisations, owned and operated by Serbia's local and regional governments and supported by the private sector. The regional and local tourism organisations act in accordance with the National Tourism Strategy and the plans and programmes of the TOS. The Serbian Convention Bureau was established in 2007 as a part of the Tourism Organisation of Serbia in order to develop MICE tourism.

Professional tourism associations have also been established including the:

- Serbian Spas and Resorts Association (consisting of municipalities, institutes, and special hospitals)
- Associations of Tourist Agencies;
- Business Association of Hotels and Catering Operations;
- International Centre for Tourism and Hospitality Development.

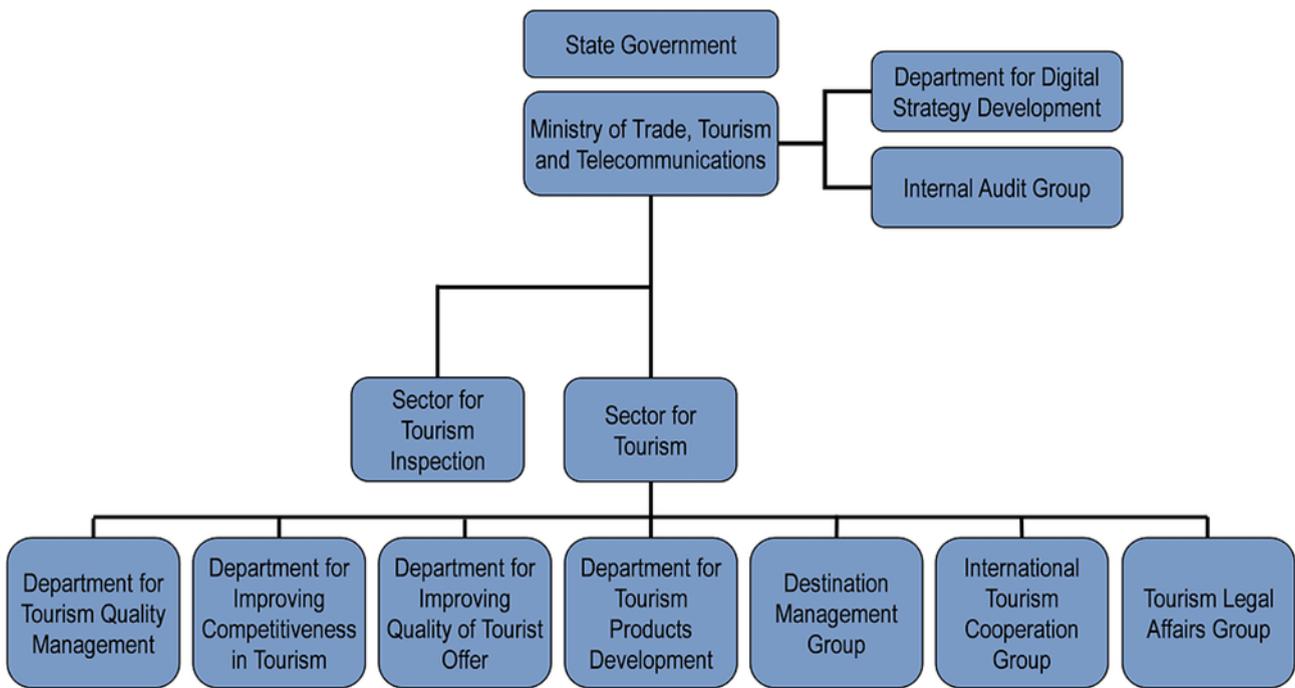


Figure 3.7.1: Structure of Tourism bodies in Serbia
(Source: OECD, adapted from Ministry of Trade, Tourism and Telecommunications, 2020)

Key national actors:

- Ministry of Trade, Tourism and Telecommunications, 2020;
- Tourism Organisation of Serbia (TOS).

(Source: OECD 2020,

<https://www.oecd-ilibrary.org/docserver/6b47b985-en.pdf?expires=1609278380&id=id&accname=guest&checksum=C900927894EC452A9211E9779BB1A836>)

3.7.3 National policies and strategies on tourism and sustainable mobility

The Serbian key national policies, strategies and actions plans on tourism and sustainable mobility are:

- Strategy for sustainable urban development of the Republic of Serbia until 2030;
- Tourism Development Strategy of the Republic of Serbia for the period from 2016 to 2025;
- Strategy on waterborne transport development of the Republic of Serbia, 2015 – 2025;
- Law on Tourism.

Strategy for sustainable urban development of the Republic of Serbia until 2030.

The strategy consists of decisions made through the cooperation of various parties in order to establish a strategic framework for product orientation, inclusive and effective long-term urban development in Serbia. Contextual analysis of the state of urban development the following are included seven thematic areas:

- 1) Sustainable economic growth - urban economy and finance,
- 2) Sustainable urban structures and rational land use,
- 3) Inclusive urban development,

- 4) Demographic change and housing,
- 5) Traffic and technical infrastructure,
- 6) Environment and climate change,
- 7) Cultural heritage and urban culture.

A thematic SWOT analysis was prepared for all seven areas, which is supplemented and corrected on the basis of suggestions and proposals obtained on the round tables (held on March 29-30, 2018) and by members of the Working Group.

(Source: Ministry of Construction, Transport and Infrastructure, website <https://www.mgsi.gov.rs/cir/dokumenti/urbani-razvoj>)

Tourism Development Strategy of the Republic of Serbia for the period from 2016 to 2025

The first objective of the recently adopted Tourism Development Strategy of the Republic of Serbia for the period from 2016 to 2025 is a sustainable economic, ecological and social development of tourism in the Republic of Serbia.

The Tourism Development Strategy of the Republic of Serbia 2016-2025 (Official Gazette 98/2016) with the Action Plan recognizes the City of Belgrade and the metropolitan area as one of the 18 tourist destinations of RS. Key values (attractiveness): cultural and historical heritage, entertainment, gastronomy, festivals, Danube and Sava, shopping, Salters spa, natural resources. Points of development: Belgrade - the city center of the old part of the city, New Belgrade - business and commercial zone, Zemun - the city center and the banks of the Danube.

Key products: city break, MICE tourism, nautical, round trips, festivals/events (Beerfest, BITEF, BELEF, FEST, Belgrade Manifesto, Fish fest,), special interests, health tourism and cultural thematic routes. According to the Action Plan that resulted from this strategy, the document Development Strategy of the City of Belgrade until 2021 should be updated and a program for the development of tourism in the city of Belgrade should be developed.

The Tourism Development Strategy sets the following goals:

- Raising the share of hotels and similar catering facilities in total accommodation capacities to 50%;
- Reaching a total occupancy of accommodation capacities (accommodation units) of 30%;
- Increasing tourist influx by up to three times, or at least by 50%, by 2025;
- Increasing unit expenditure of tourists (per night) by 50%;
- Increasing the share of inbound tourists' overnights to 45% by 2020 and to 55% by 2025;
- Increasing the direct share of tourism in the GDP of the Republic of Serbia twice over;
- Increasing the amount of direct employment in the tourism industry by at least 50% and increasing employment in tourism and complementary activities by up to three times;
- Growth of direct investment

(Sources: Ministry of Trade, Turism and Telecommunications website <https://mtt.gov.rs/download/3/TOURISM%20DEVELOPMENT%20STRATEGY%20OF%20RS%202016-2025.pdf>)

Strategy on waterborne transport development of the Republic of Serbia, 2015 – 2025

Strategy on waterborne transport development of the Republic of Serbia, for the period from 2015 to 2025 has been adopted, together with an Action plan.

The Strategy has defined a list of the most important investments in:

- Serbian ports
- eliminating all critical sectors for navigation on the waterway network
- further improvement of intelligent waterway transport systems

(Source: Ministry of Construction, Transport and Infrastructure, website. <https://www.mgsi.gov.rs/en/odsek/development-inland-waterways-infrastructure>)

Law on tourism

According to the Law on Tourism this law regulates: conditions and manner of planning and development OF tourism; tourism organizations for tourism promotion; tourist agencies; tourism services; Tourism Register; other issues of importance for the development and promotion of tourism. According to the Law on Tourism, tourism planning and development includes: integrated planning of tourism development and accompanying activities; proclamation and sustainable use of tourist space; jobs of special importance for tourism development; categorization of the tourist place and implementation of incentive measures for the development of tourism.

According to the Law on Tourism, the types of planning documents are the Tourism Development Strategy of the Republic of Serbia, Strategic Master Plan, Strategic Marketing Plan, tourism product development program, tourism development program, promotional activities program, where all lower planning documents must be harmonized with the Tourism Development Strategy of Serbia.

(Source: Ministry of Construction, Transport and Infrastructure website [https://mtt.gov.rs/download/1\(2\)/ZAKON%20%20TURIZMU.pdf](https://mtt.gov.rs/download/1(2)/ZAKON%20%20TURIZMU.pdf))

3.7.4 Multi-level governance and competences on sustainable tourism and mobility

There are three governance levels:

- National
- Regional
- Local

Powers division on tourism in Serbia

Central level

The Serbian Government responsible for the development and implementation of laws and policies (aligned to the Constitution) through the ministries and their associated departments and parliamentary groups/committees.

The Ministry of Trade, Tourism and Telecommunications, with the Department for Tourism is responsible for:

- strategy and policy for tourism development
- integrated planning and development of tourism and related activities
- development, proclamation and sustainable use of tourist destinations
- categorization of tourist sites
- implementation of incentives and the provision of material and other conditions for the promotion of tourism development
- promotion of tourism in the country and abroad

- taxes, fees and penalties in tourism
- property and legal affairs in tourism
- improvement of the value and competitiveness of tourism products
- tourism market research and the development of the tourist information system
- the conditions and manner of performing activities of travel agencies
- catering activities
- nautical activities
- tourist hunting activities
- the provision of services in tourism
- planning, maintenance and equipment of public ski areas and the provision of services at ski resorts
- planning, maintenance, equipment and services in spas, theme parks and public beaches
- inspection in the field of tourism

The following internal units are being formed in the Tourism Sector:

- Department for quality management in tourism;
- Department for Improving Competitiveness in Tourism;
- Department for improving the quality of the tourist offer;
- Department for development of tourist products;
- Tourist destination management group;
- Group for international cooperation in tourism;
- Group for legal affairs in the field of tourism;

Regional level

Autonomous provincial authorities are responsible for:

- Adopting programmes and strategies of the state;
- Promotional activities.

The Vojvodina Provincial Secretariat for Economy and Tourism is responsible for tourism programmes and industry development in the territory.

Local level

Municipal authorities are responsible for:

- Adopting programmes and strategies of the state;
- The management and development of a tourist area;
- The application for categorisation of a tourist resort;
- Promotional activities;
- Displaying tourist signalisation;
- Fixing the tourist taxes.

(Sources: Ministry of Trade, Tourism, and Telecommunications website:
<https://mtt.gov.rs/en/ministry/responsibilities-of-the-ministry/>

<https://mtt.gov.rs/sektori/sektor-za-turizam/>

Online platform "Division of Powers. European Committee on the Regions",
<https://portal.cor.europa.eu/divisionpowers/Pages/Comparer.aspx?pol=Agriculture&c1=Serbia&c2=Serbia>

Powers division on transport in Serbia

Central level

The Ministry for Construction, Transport and Infrastructure is in charge of the overall policy, laws, regulations and strategic research related to transportation.

Consists of departments for:

- Road transport, road and traffic safety
- Railways and intermodal transport
- Department for air traffic
- Waterborne transport and safety of navigation

Regional level

Autonomous provincial authorities are responsible for:

- Regulating issues relevant for the Province concerning road, river and railway transport;
- The management of public roads, with the exception of national roads that are part of the European roads network and municipal roads;
- Establishing the public company for management of public roads on the territory;
- The management of waterways, establishment of the public company for management of waterways, enacting of the annual programme of marking and maintenance of waterways;
- Performing other duties stipulated by law;

In Vojvodina the Provincial Secretariat for Energy Construction and Transport co-ordinates transport provision.

Local level

Local authorities are responsible for:

- The construction, reconstruction, maintenance and use of local network of roads and streets and other public facilities of municipal interest;
- The regulation and provision of local transport.

Responsible ministries/bodies

- The Ministry for Construction, Transport and Infrastructure
- Vojvodina the Provincial Secretariat for Energy Construction and Transport

(Sources:

Ministry for Construction, Transport and Infrastructure website: www.mgsi.gov.rs/en/ministry

Vojvodina Government website www.vojvodina.gov.rs/en/

Statute of the Autonomous Province of Vojvodina, Official Gazette of the Republic of Serbia No.62-2009. Law on Local Government, Article 18 (10 -12)

Online platform "Division of Powers. European Committee on the Regions": <https://portal.cor.europa.eu/divisionpowers/Pages/default.aspx>)

3.7.5 National cooperation schemes and action plans for sustainable tourism and mobility promotion

Some of the Serbian main touristic cooperation schemes and initiatives on sustainable tourism are the following:

- National touristic promotion website and agency
- Explore Serbia – Active holiday
- Explore Serbia – Family holiday
- Explore Serbia – Rural retreats
- Explore Serbia – Thematic routs
- Experience Serbia – Gastronomy
- Experience Serbia – Festivals
- Experience Serbia – Nature

The Tourist Organization of Serbia (TOS) has its website, as the official institutional bearer of tourism promotion of the Republic of Serbia on the domestic and foreign markets and performing other activities important for the development of information and propaganda activity in tourism of the Republic.

The activity of TOS is directed towards positioning the tourist product of Serbia in the domestic and foreign markets and tourist vaporization of Serbia's comparative advantages, such as its geo-strategic position, historical, cultural and natural identity.

(Source: Tourist Organization of Serbia website <https://www.srbija.travel/en/about-us>)

4. Strategical, political and legislative frameworks for sustainable tourism promotion at regional level

4.1 Regional policies, strategies and action plans for sustainable tourism and mobility promotion: Emilia-Romagna Region

4.1.1 Governance and key actors of the Emilia-Romagna Region for sustainable tourism and mobility promotion

Emilia-Romagna Region has four different level of governance:

- Regional level
- Provincial and metropolitan city level
- Touristic macro area level
- Municipal and Union of Municipalities level

Emilia-Romagna Region role in tourism promotion:

- Define touristic strategies and guidelines
- Marketing for the Emilia-Romagna tourism promotion abroad (through Apt servizi srl)
- Identification of the Touristic Macro Areas for the tourism promotion (Destinazioni Turistiche)
- Financing support to the promotion measures of the identified Touristic Macro Areas
- Financing the Local Plan for the Tourism Promotion (Programmi turistici di promozione locale, PTPL)
- Collaboration in the management of the touristic Welcome Points
- Promotion of the digital innovation in the sector
- Management of the regional “Control Room” on tourism (Cabina di Regia)
- Management of the Regional Observatory on Tourism.

Emilia-Romagna Role in sustainable transport promotion for tourists

In 2019, Emilia-Romagna region has developed the "Handbook on sustainable mobility in the Med area", i.e. the Guide for solutions in terms of sustainable mobility, which is available to policy makers, local authorities, professionals and also to representatives of local and regional communities, citizens and users. This is the most relevant result of the INTERREG MED Mobilitas project (<https://mobilitas.interreg-med.eu/>) , in terms of transferring the results on an urgently topical issue such as sustainable tourism.

Tourism that focuses on the coasts in summer, but also the movements of residents during peak hours during the rest of the year, cause intense traffic phenomena, with important repercussions on air quality, noise pollution and health, making these places less safe and attractive.

The goal of the handbook is to enhance the projects and solutions created in the Mediterranean area specifically to respond to these problems. The volume collects the results produced by 7 projects of the network on sustainable mobility (CAMP-sUmp, EnerNET-Mob, LOCATIONS, MOBILITAS, MO-TIVATE, REMEDIO and SUMPORT) that can be replicated in other territories, organized for mobility policies and mobility actions.

More information, in terms of regional governance at:

<https://www.regione.emilia-romagna.it/turismo/promozione/organizzazione-e-promozione-del-turismo-in-emilia-romagna>

Key regional tourism stakeholders are:

- *APT Servizi srl* (the regional company for the tourism promotion)

It represents the tool for implementing planning and planning in the tourism sector of the Emilia Romagna Region and the regional system of Chambers of Commerce, in house providing.

APT SERVIZI SRL, in particular, implements the management and implementation of regional tourism plans on the national market and, in particular, specialization in the implementation of projects on international markets.

- *“Destinazione turistica Romagna”* portal

The institutional portal *“Destinazione turistica Romagna”* is a communication channel to provide useful news and reports to members, organizations and individuals and the stakeholders of the organization. In addition, the portal presents strategies, projects and results of the tourism planning of the institution in such a way that the exchange of information is shared with all the local adhering bodies to favor the development of tourism strategies in Romagna.

- *Touristic companies*

Numerous tourist agencies for both stays and trips are present in the Emilia Romagna territories. There are also regional albums that bring together organizations with proven experience and safety such as FIAVET, ANSPI, etc.

- *Emilia Romagna Municipalities and Provinces*

Emilia-Romagna is made up of the union of two historical and geographical regions:

- Emilia, which includes the provinces of Piacenza, Parma, Reggio Emilia, Modena, Ferrara and most of the metropolitan city of Bologna (capital of the region);
- Romagna, which includes the provinces of Ravenna, Forlì-Cesena, Rimini and the municipalities of the metropolitan city of Bologna located east of the Sillaro river

4.1.2 The Emilia-Romagna legislative and policy tools for sustainable tourism and mobility promotion

In the following three main aspects are analysed:

- Regional Policies (tourism and sustainable mobility)
- Regional Promotional Strategies
- Any other relevant political/strategical tool

The main **regional policies on tourism** promotion are:

- *Regional law 4/2016 on regional touristic services and promotion organization*

The law governs the tourism organization of the Emilia-Romagna Region and defines the activities of the Region and the exercise of the functions conferred on local territorial bodies and other bodies interested in the development of tourism in compliance with the principles of:

- a. subsidiarity, differentiation and adequacy;
- b. integration between the various levels of government guaranteeing necessary forms of cooperation and procedures of connection and consultation, for the purpose of coordinated programming;

c. completeness, homogeneity of functions, uniqueness of administrative responsibility.

With this law, a regional Control Room was established with the participation of public and private institutional and representative subjects of the tourism sector of Emilia-Romagna. The Control Room carries out coordination functions on the strategic lines for the development of tourism promotional-marketing activities outlined by the regional council.

The law is composed by 20 articles concerning: i) Regional tourism organization (Articles 1 - 4); ii) Interventions for the promotion and promotion of tourism (articles 5 - 14); Financial, final and transitional provisions (Articles 15 - 20).

- *Regional law 23 April 2019, n°3*

The law concerns tourism in the Emilia Romagna region as it governs the start-up and operation of the Condhotel and the recovery of the colonies and changes the regional law of 28 July 2004, no. 16 (discipline of accommodation facilities aimed at hospitality)

In particular, the law governs the procedures for starting and operating condhotel activities in the regional territory, also providing for simplified procedures for the approval of the variations to the urban planning instruments of the municipalities that are necessary for the implementation of the law, in order to diversify and strengthen the tourist offer, as well as to encourage investments aimed at the requalification of existing hotel accommodation facilities, as per article 5 of the regional law of 28 July 2004, n. 16 (Discipline of accommodation facilities for hospitality), and to promote processes of redevelopment and regeneration of existing properties classified as colonies.

The main **regional policies on sustainable mobility promotion** are:

- *The Integrated Regional Air Plan (PAIR 2020) of Emilia-Romagna* was approved by resolution of the Legislative Assembly no. 115 of 11 April 2017 (pdf, 637.42 KB) and entered into force on 21 April 2017. The PAIR2020 expects to reach important targets for the reduction of emissions of the main pollutants compared to 2010 by 2020: 47% for fine particles (PM10), 36% for nitrogen oxides, 27% for ammonia and volatile organic compounds and 7% for sulphur dioxide) which will reduce the population exposed to the risk of exceeding the permitted daily limit of PM10, 64% to 1%.

- *L.R. 5 June 2017, n. 10 - Interventions for the promotion and development of the regional cycling system*

The goal of this law on cycling in Emilia-Romagna, unanimously approved by the regional assembly is to make the Emilia-Romagna region increasingly sustainable and less polluted.

The objectives of the law are to double the percentage of trips by bike and on foot in the area; the reduction of the motorization rate in the region; the halving of road fatalities by 2020 as indicated by the European Union; the new connections between the existing tracks; greater train-bike integration; the promotion of new conscious lifestyles and active mobility also with a view to preventing the health of the community, for the best use of the territory and the containment of land use; create more services for cyclists, from repair to vigilance.

- *Regional Plan on Transport (PRIT 2025)*

The Legislative Assembly of the Emilia Romagna region with Resolution no. 214 of 10/07/2019 adopted the new PRIT (Regional Integrated Transport Plan) 2025 approved by the Regional Council n ° 2045 of 03/12/2018.

The PRIT 2025 contains a series of regulatory actions to develop sustainable mobility such as: Promotion of sharing services, Promotion of Mobility management actions, Regulatory measures of urban accesses

and parking, Management of speed limits, Traffic and vehicle pricing, Measures for electric mobility, alternative fuels and the fleet, Mobility in internal areas, Accessibility actions.

It also deals with Participation and education in sustainability, the promotion of "Active Mobility" and Tourist Mobility.

With the elaboration of the Integrated Regional Transport Plan (PRIT 2025), the Emilia-Romagna Region has decided to start a participatory process on a major issue of interest for all citizens: mobility and transport. The objectives are:

- overall improve the quality of the Region's action, favoring and qualifying the relationship between the Administration and citizens;
- ensure the inclusion of new subjects in the PRIT development activity, in addition to the institutional ones involved in the planning conference;
- collect experiences and points of view, receive perceptions and indications on general issues of mobility and transport in Emilia-Romagna;
- draw guidelines to better define the new PRIT, in terms of cultural vision and intervention priorities;
- identify ideas and proposals to strengthen the transition to forms of public, cycle / pedestrian and intermodal (rail and road) mobility, in line with the objectives of the plan;
- identify the most suitable forms of communication with citizens in terms of transport.

4.1.3 Regional cooperation schemes and action plans on for sustainable tourism and mobility promotion

Sustainable tourism and mobility are promoted within Emilia Romagna through several portals, networks, websites, etc. Some of these include:

Coastal areas joint promotional campaign (Riviera romagnola): several campaigns and advertisements on national TV and on the web promote the touristic attractions of the region and count on exceptional testimonials; this promotional plan was implemented through a substantial investment of the Region together with APT Servizi and "Destinazioni turistiche" portal.

Regional Touristic Portal (www.emiliaromagnaturismo.it): it brings together all possibilities related to tourism throughout the region: information on historical villages, cities and castles, bicycle paths, trekking paths, itineraries and events.

Regional Observatory on Tourism (www.ucer.camcom.it/osservatori-regionali/os-turistico): the regional observatory on tourism gathers all the information related to tourism in Emilia Romagna and builds a picture of the touristic situation divided by area, city, type of tourism, and so on. Information on tourism in Emilia Romagna are available online until 2019.

Regional thematic trekking paths mapping and promotion (SentieriWeb – www.ambiente.regione.emilia-romagna.it/it/geologia/cartografia/webgis-banchedati/sentieri-web): an interactive map shows all the available paths for walking and trekking with all the points of interest highlighted (shelters, wellsprings, refreshment points, environmental or cultural emergencies). Maps can be downloaded, there is a contact email in case of reporting necessities.

Network of the local touristic reception points (www.emiliaromagnawelcome.com): this portal works similarly to Booking, it is possible to look for an experience in different fields (food valley, art, well-being and spa, golf, motor valley, sea side, etc.) and book it for specific days.

Thematic regional networks (thermal cities, food cities, motor cities, etc.) related to “Destinazione turistica” portal. This is an innovative form of public-private collaboration. Some examples:

- Emiliaromagnaturismo (www.emiliaromagnaturismo.it/it/localita/bologna): it provides a dedicated page for each city in the region with all its detailed information (why visiting it, what to see, where to go eat, etc.). On the same portal, there are dedicated pages for golf, food and other topics.
- Non solo buono (www.nonsolobuono.it/oltre-il-piatto/turismo-sostenibile-in-emilia-romagna): it gives five itineraries of sustainable tourism in the protected areas of the region. These itineraries are all in natural sites, parks and forests of Emilia Romagna.
- Travel Emilia Romagna (www.travelemiliaromagna.it/turismo-sostenibile): this portal is entirely dedicated to ecotourism in Emilia Romagna, it gives hints and ideas of traveling sustainably in the region (by foot, by bike, on a horse, etc.). It is also possible to subscribe to the Newsletter.

Within the many touristic portals of Emilia Romagna Region, we may name some portals dedicated to specific topics/areas:

- Visit Emilia (<https://www.visitemilia.com/destinazione-turistica-emilia/>): specifically focused on “Emilia” and its territories, it has dedicated pages for food, culture and nature.
- Destinazione Romagna (<https://destinazioneromagna.emr.it/>): specifically focused on Romagna and its territories, it has dedicated pages for each city belonging to Romagna and the related news.
- Food Valley Travel (<https://www.foodvalleytravel.com/>): a portal dedicated to food, it suggests food experiences by topic, city or vacation type.
- Motor Valley (<https://motorvalley.it/>): a web portal dedicated to motors and cars, there are news on events, museums, private collections and organized tours.
- Wellness Valley (<https://www.visitwellnessvalley.com/>): a web portal dedicated to wellness, it contains all the hotels, spa, available wellness experiences in the region.

The innovative forms of public-private collaboration in the touristic sectors started in 2016 with a new regional law, i.e. the law 4/2016 on tourism, which establishes the synergy between public and private in the promotion of tourism. So far, three “Destinazioni Turistiche” (touristic destinations) have been identified together with APT Servizi Emilia Romagna: Romagna destination (including the provinces of Rimini, Ravenna, Forlì-Cesena and Ferrara), Bologna Metropolitan City and (including also Modena) and destination western Emilia (Reggio Emilia, Parma and Piacenza). With this new law, tourism is not anymore about products (coast, spa, Appennine, historical cities) but destinations, where all territories participate to tourism coordination.

4.2 Regional policies, strategies and action plans for sustainable tourism and mobility promotion: Friuli-Venezia-Giulia Region

4.2.1 Governance and key actors of the Friuli-Venezia-Giulia Region for sustainable tourism and mobility promotion

The FVG Region operates on three main levels of governance, within which these territories functional sectors and stakeholders interact. This, with the aim of planning, managing and promoting sustainable tourism and mobility (ST&M) in the most effective and efficient way. Key players involved are:

- 1) of public nature (Region, Municipalities, organizations and structures supporting tourism, transport and mobility companies)
- 2) of private nature (tourist and mobility enterprises, local associations)
- 3) of public-private nature (tourist consortia, transport companies, local action groups).

The aforementioned mainly operate by following strategies and measures provided by the European Union and the Regional Strategic programs, plans and laws. Moreover, they also have to comply with indications deriving from national specific sectorial norms, also in the field of environmental, cultural heritage and according to Partnerships and Service Agreements stipulated between other specific stakeholders.

- **Key-players of the regional level of governance**

- ***Regional Directorates responsible for the ST&M sectors in the Autonomous Region of Friuli Venezia Giulia***

Central Directorate for Production activities

This deals with the programming of the economic development in the manufacturing, tertiary and tourism sectors. It is responsible for EU programming 2021-2027 for the implementation of the Agenda 2030's sustainable goals. Its "Tourism Service" operates within the Central management structure. It is responsible for coordinating and directing tourism promotion activities, headed by public bodies and private operators, in line with the operational guidelines of the PromoTurismoFVG DMO. Regarding the promotion of the territory, it contributes to promote an "*integrated brand image*" of the Region at national and international level. It manages the regional tourism strategy, also involving the PromoTurismoFVG.

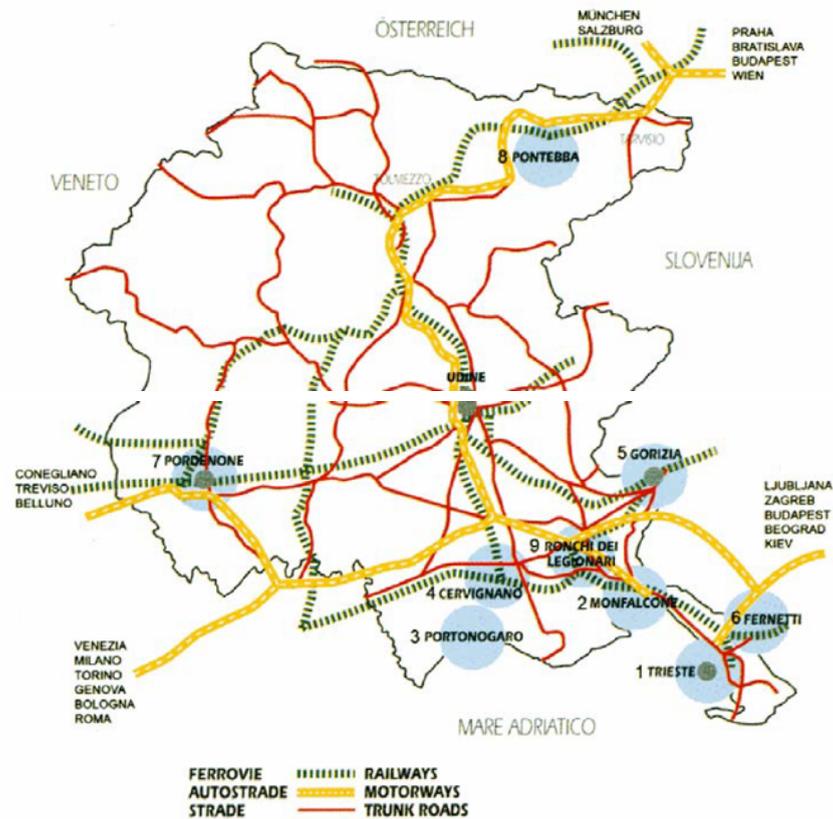
Central Directorate of infrastructures and territory

This deals with infrastructures, regional land and airport transport services, internal navigation routes and functionalities of commercial ports, local public transport by car and rail, in urban and suburban areas and the maritime sector. The structure oversees the regional planning which involves the development of strategic and sectoral tools, the implementation of intervention programs for transport structures serving residents, landscape planning and landscape protection and enhancement. It is responsible for the development of European programs in transport, logistics and navigation sectors, of a cross-border, transnational and interregional nature.

The "Regional and local public transport service" operates within the Central Directorate. It deals with the development of plans and programs in the field of public transport, tariff, and intermodal integration, and with the fulfilment of the infrastructures dedicated to road, rail and maritime public transport.

In addition, there is also the "Landscape, territorial and strategic planning service". It deals with the territory's transformations and verifies the compliance of the territorial structure of the regional planning. It also prepares regional territorial planning tools and coordinates regional structures, in order to integrate

sectoral plans and intervention projects. Lastly, it outlines the planning tools of local authorities and development agencies.



The system of transport networks in Friuli Venezia Giulia

Central Directorate for Environmental Protection, Energy and Sustainable Development.

This deals with strategic planning and programming of environmental actions and sustainable development. It also coordinates the environmental sustainability activities and provides support for training and education in the environmental field. It is responsible for the implementation of interventions and projects of transnational, cross-border and interregional cooperation.

Its "Environmental Assessments Service" operates within the CD. It is in charge of the strategic environmental assessments and environmental impact of programs, projects and works proposed by public and private subjects. It analyses the national plans which may have repercussions on the regional territory and tourism sectors. Moreover, it analyses the impact that the plans and projects may have on sites of interest at the European Community level and of the 'Natura 2000 network'. Finally, it expresses strategic environmental assessment opinions on interregional and cross-border plans.

- PromoTurismoFVG

PromoTurismoFVG is a public Destination Management Organization (DMO). It deals with the planning and the organization of tourist proposals. The development and communication of tourist products promoted and integrated for the Friuli Venezia Giulia region. It develops the regional tourism system by providing guidelines and collaborating with the key players in the sector. In order to carry out its mission, it uses tools such as territorial design, multimedia channels and interactivity, participation in international fairs, market research and analysis. The organization enhances and promotes regional assets such as territorial

peculiarities (sea, mountains, hills), agricultural, food and wine productions; historical, artistic and architectural heritages. It addresses the slow tourism flows (cycling, walking) and stimulates sustainable mobility.

- Trenitalia S.p.A. for the provision of rail transport services on the regional territory

Trenitalia, which is part of the Ferrovie dello Stato S.p.A. Group, is the public operator responsible for providing rail transport services in the regional territory. It provides long-distance rail transport services and connects Friuli Venezia Giulia to Austria and the rest of Italy. In addition, it provides medium-distance services and connects cities to the main urban and tourist centers within Friuli Venezia Giulia, on the basis of a Service Contract stipulated with the Region. On some routes, such as along the Trieste - Udine - Tarvisio, Trenitalia uses a rolling stock used for the transport of bicycles, to support sustainable mobility and slow tourist flows.



The railway network system in Friuli Venezia Giulia

- Local Public Transport (TPL) Scarl FVG for the provision of road and sea transport services on the regional territory

Local Public Transport (TPL) Scarl Fvg is the only regional operator for the bus, railways and maritime transportation of people, residents, and tourists. It is a public-private company established by the Consortium by the main transport companies of Friuli Venezia Giulia ⁽¹⁾. It provides road and sea transport services in the regional territory by connecting all urban centres and marine/mountain tourist resorts. Overall, at the regional scale there are 8.000 stops, many of which also act as intermodal hubs in support of ST&M.

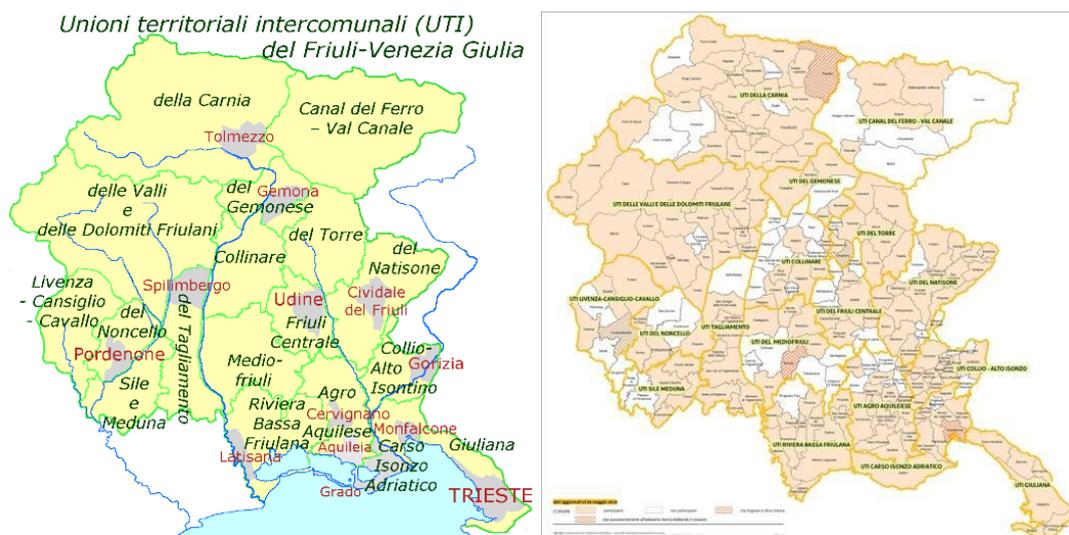
• Key players of the “wide area” governance level

- Tourist consortia for the management, promotion and marketing of the tourist product

According to the regional Law of December 9th, 2016, no. 21 ⁽²⁾, Tourist Consortia are private entities which, within the territories of reference, deal with the promotion and marketing of the tourist offer and the coordination of public and private initiatives to be carried out in the area. The mission is implemented in accordance with the guidelines of the Region, with the planning prepared by PromoTurismoFVG and in agreement with the Municipalities. In addition, they develop targeted promotional projects and set up information systems to support touristic activities on a large area scale. The Consortia are widespread and cover different areas of the region ⁽³⁾.

- Inter-municipal Territorial Unions for the management of services and the promotion of territories

Municipal Territorial Unions are made of groups of Municipalities that have also specific competences in the fields of sustainable development of territories and local economies. To date, the main activities pursued by the Unions have focused on promoting territorial heritage and slow tourism, including the organization of events, the improvement of connections and accessibility to tourist destinations. This also by using public transport services, the networks' planning and cycle routes of wide areas ⁽⁴⁾. With the recent regional legislation ⁽⁵⁾, the Territorial Unions will be transformed into Regional Decentralization Units (EDR) and into the Community of Municipalities.



Inter-municipal territorial unions in Friuli Venezia Giulia

- Local Action Groups for economic and touristic liveliness and the enhancement of the cultural offer

Local Action Groups (LAG) are public-private development tools of large-area, that deal with promoting the development of regional mountain and rural areas ⁽⁶⁾. The mission is pursued through the management of the Local Development Strategy (LDS), the promotion of the EU's Leader program and the cross-border Interreg programs (Italy - Austria, Italy - Slovenia), and through the implementation of the Plan of Rural Development (PRD). These tools, born thanks to the European Union, bring together Municipalities, economic categories, associations of the area and companies belonging to a specific territory, in a consortium company.

The actions and initiatives promoted by the LAG of Friuli Venezia Giulia are designed following the "from the bottom-up" approach. The main outputs of the groups concern the social and economic liveliness of the areas, the qualitative improvement of the touristic services offered by the accommodation facilities, the support to the agricultural marketing, agri-food and handcrafted products, and including the training of operators oriented to promote the values of biodiversity, sustainability and slow tourism and mobility.

An interesting project launched by the Euroleader LAG is the CarniaGreeters network which is a member of the GGN Global Greeter Network and that is constituted by local volunteers, who work in the mountain area of Friuli. These volunteers move in a "sustainable way" outside the traditional tourist circuits in order to make travellers experience authentic experiences, accompanying them to the discovery of heritages, valleys and art treasures. In the meantime, they also create new contacts with local tourist incoming structures and SME of the agri-food sector.

- Companies for the transport of people by road and by sea: TPL Scarl Fvg

The mobility of people, residents and tourists is ensured by the four companies that make up the TPL Scarl Fvg. These companies connect the cities and territories of Friuli Venezia Giulia through the provision of capillary and frequent extra-urban services, which are equipped with booking systems and telematic payment methods. The stops of the TPL services are often configured as intermodal hubs where the transfer from one way of transport to another is carried out (bus - train, bus - car, bus - bike). Road passenger transport services are also integrated with the maritime connections of the regional coast ⁽⁷⁾.



“Bus + bike” intermodality in Friuli Venezia Giulia

- Ferrovie Udine Cividale (FUC) S.r.l. for the provision of rail transport services for people

Since 1886, the railway transport service provided by the regional public company Fuc S.r.l. has been operating between Udine and Cividale del Friuli, a UNESCO city. It is organized along a single track non-electrified line and around 455.000 passengers are transported annually. Some stations, such as Udine, San Gottardo and Cividale del Friuli, perform the function of intermodal hub while others are located in urban, industrial, architectural and natural contexts ⁽⁸⁾. The Company also organizes cross-border rail transportation between Italy / Friuli Venezia Giulia and Austria / Carinthia along the Trieste - Villach route via the "train + bike" Mi.Co.Tra ⁽⁹⁾ which allows train-bike-walk inter-modality and supports the significant flow of sustainable tourism that moves along the route. The Mi.Co.Tra service is integrated with “bike-bus” ⁽¹⁰⁾ which allows connections with other places not served by the cross-border railway service.



Railway service between Udine and Cividale; MI.CO.TRA "Train + bike" intermodality Villach – Trieste.

- **"Sacile-Gemona" Pedemontana Friuli Tourist Railway**

On the non-electrified Sacile - Maniago - Gemona railway, tourist transport services are organized by the use of historic trains by the Region, by the State Railways Foundation and with the participation of local key players and associations ⁽¹¹⁾. This service contributes to the promotion of the localities crossed over by the line and its landscape and historical heritage, by providing support for slow and sustainable tourism development. The services are organized close to and in the context of major events and shows ⁽¹²⁾.



Sacile - Maniago - Gemona del Friuli historic train

- **Key players of the local governance level**
- **Municipalities with specific functions in ST&M field**

Municipalities support travel and tourism agencies, tourist accommodation and beach properties through the activation of two initiatives: the Desk dedicated to production and service activities, which allows the simplification of administrative procedures, and the establishment of Info Points in order to provide tourist information and hospitality ⁽¹³⁾. These bodies can carry out tourism promotion activities in the area in accordance with the guidelines set out in the Strategic Tourism Plan. They may also intervene to strengthen the tourism economy and sustainable mobility also through the planning of networks and cycle routes, through tools such as municipal Biciplan ⁽¹⁴⁾ and the management of automotive and heavy traffic that crosses local arteries.

- **Information and Reception tourist support Offices**

In tourist, marine and mountain centres as well as in the main cities of the Region, there are Help Desks with the purpose of informing, welcoming and assisting tourists. The structures are managed by the Municipalities, by the Pro Loco or by other subjects promoting the territory and staffed with specialised and multilingual personnel ⁽¹⁵⁾.

- ***Pro Loco for territorial promotion***

The Pro Loco are private voluntary local associations that deal with the promotion of the place, the discovery and protection of local traditions, language and customs, the enhancement of products and the beauties rooted in the local context. They may provide greater authenticity to places and have a greater knowledge of heritage and tourist, craft and artistic activities. In Friuli Venezia Giulia these volunteer organizations are present in numerous locations ⁽¹⁶⁾.

- ***Companies for local public transport by road and by sea***

The mobility of people, residents and tourists, within the context of the main cities (Trieste, Udine, Pordenone, Gorizia, Monfalcone, Lignano Sabbiadoro) is ensured by urban services provided by the local companies that make up the TPL Scarl Fvg. These services connect the main parts of the cities and large aggregates such as business districts, hospital units, university, school, commercial and industrial centres.

4.2.2 The FVG legislative and policy tools for sustainable tourism and mobility promotion

In order to promote tourism and to develop integrated and sustainable forms of mobility, the Friuli Venezia Giulia Region has adopted strategies and has implemented policies concerning mainly tourism, transport facilities and landscape valorisation.

The Regional Departments and Services of the involved sectors, as well as the regional organizations and agencies of promotion are all in charge of program management and operational processes. Private companies and local stakeholders play an important role and are recipients of resources in order to achieve the objectives set by the regional strategic Plans. The strategies are also in line with the principles and objectives proposed by the European Union in the tourism, transport and environmental sustainability sectors, especially at cross-border and interregional cooperation levels.

• **Regional Promotional Strategies of general nature**

The 2020 Economic and Financial Regional Document prepared by the Autonomous Region analyses the global and regional economic context, the demographic and labour market evolution. Furthermore, it identifies the main policies that will guide spending forecasts over the next three-year period, and will be adopted in the various sectors as well as recognizing the main expected results expressed in terms of efficacy and efficiency.

The 2018/2023 Regional Planning Document formulates the integrated strategy of the Autonomous Region, identifies the values, principles and purposes that guide government action, illustrates the "missions" and "strategic lines" for the various areas of activity. Together with the swot analysis, it highlights strong internal and external points on which to leverage and the critical ones to be recovered, to encourage the harmonious development of the regional community.

• **Regional Strategies of sectoral in nature**

- ***Polity Sector***

- The fundamental law for the reorganization of local institutions, that have also specific competences in the ST&M sectors, is the *Regional Law of the 29th November 2019, n. 21* entitled "Coordinated

exercise of functions and services between the local bodies of Friuli Venezia Giulia and the institution of regional decentralization bodies".

- Tourism Sector

- *Regional Economic and Financial Document. 2020 regional programming document. Mission 7 - "Tourism", Strategic line - "Culture and quality tourism".*

The Mission is managed by the Directorate of Production Activities Directorate, by the "Tourism Service", by PromoTurismoFVG (which will have the task of implementing the specific interventions) and by the Central Infrastructure and Territory Management. The document outlines the perspectives and objectives of regional action. This in order to strengthen and support the national and international positioning of the Region as a tourist destination for all seasons and for all types of interests.

The increase in the attractiveness and flow of tourists and travellers is connected to the quality of the tourist offer, to the promotion of excellent products and to a widespread tourist reception system. Public and private investments are indicated as part of the strategy and the enhancement of territorial specificities is proposed as well as the dissemination of experiential activities.

Support is provided to the tourism sector through local infrastructure, through integrated networks and itineraries and through the enhancement of services related to the use of e-bikes. Finally, attention is paid to local public transport services and tourism-type transport, both by rail and by sea routes. This because there is a close link between tourism and mobility, in addition to the necessity to guarantee free access to cities, places of history and art, natural and landscape heritage.

- *Vision 2019/2022 - Friuli Venezia Giulia as a sustainable and accessible Italian tourist destination prepared by PromoTurismo FVG*

This vision foresees the positioning of the Region as a sustainable destination, which implies the necessity to create experiences and tourism products that can be easily recognizable on the market. The key terms for the sector are "territory", which has peculiarities and biodiversity of great value, "market", which requires quality, non-standardized products and the opportunity to live authentic experiences, "entrepreneurship", since operators contribute to define strategies and managing activities and they are called out to change approach and evolve themselves, in order to correspond to the needs of the market and the sensitivity of the new tourists.

- *Regional Law of the 9th December 2016, n. 21 "Discipline of regional policies in the tourism sector and the attractiveness of the regional territory, as well as amendments to regional laws on tourism and production activities". The law defines the model and organization of tourism, support for tourism and the hotel industry, how to improve the professions and skills of tourism to the point of specifying the role of local institutions such as Municipalities, Associations and Consortia between public and private bodies.*

- Mobility Sector - Regional Programming and Planning

- *Regional Economic and Financial Document. 2020 regional programming document. Mission 10 - "Transport and the right to mobility", Strategic line - "Large infrastructures and territorial governance plan".*

The Mission is managed by the Directorate Infrastructure and Territory Management and its related "Services", and by the General Management with the International Relations Service. There cannot

be tourism development without any movement of people. Mobility, therefore, represents an essential factor for the evolution of the sector.

The document identifies a series of projects nearing completion and others of new development, aimed at improving passenger mobility.

- 1) first, through the use of railway, maritime and cycle networks in line with cross-border territorial cooperation programs. The Region intends to enhance public rail and tourist services in a logic of cooperation and integration with other operators.
- 2) it also aims at strengthening transport networks by increasing the attractiveness and turnout of services with new organizational models.

Among the objectives that the Region has set, there is also the improvement of internal connections and long-distance transport services, considering that people (users, tourists) need to move freely without using cars and that the system (of the tourism, of the environment) seeks effective and low-impact solutions in the management of mobility flows. Cross-border relations between the regional context and Carinthia and Slovenia are recognized as great interest.

- *Regional Plan for Transport Infrastructure, Freight Mobility and Logistics (2011)*

The Regional Transport Infrastructure, Freight Mobility and Logistics Plan is the current tool for general transport and logistics planning ⁽¹⁹⁾. These are sectors that represent a fundamental component for the economic development of Friuli Venezia Giulia and its international projection. The Plan deals with transportation infrastructures, mobile materials, service levels and accessibility to cities, industrial hubs, ports and logistics hubs. It proposes to optimize the flows of goods and people. Logistics represents a source of value for every sector of industrial production and commercial and tourist services and, therefore, the Plan aims to build a favourable environment to the location of infrastructures and to promote effective rail and maritime transport services, in order to intercept also new tourism niches.

- *Regional plan for local public transport (2013)*

The regional plan for local public transport ⁽²⁰⁾ allows to organize and manage the transport of people by road, rail and through maritime and cross-border services. It governs the entire public mobility system of regional interest and redesigns the overall offer of local transport. In particular, it is proposed to integrate the various services by mode (bus, train, means of navigation), by type (regional/regional fast train, urban/suburban car race, trains related to different lines) and by relationship (home - school, home-work, home - shopping, home - leisure). It is a fundamental support for tourist mobility.

- *Cycling mobility plan of the inter-municipal territorial union (2018)*

The Biciplan of vast area is planned by art. 8 of the Regional Law of the 23rd February 2018, n. 8 "Interventions for the promotion of the new safe and widespread cycling mobility". The Inter-Municipal Territorial Unions, and subsequently the Communities of Municipalities, in accordance with the objectives of the Regional transport infrastructure Plan and the Regional cycling mobility Plan, have the opportunity to design the Plan in order to ensure integration, continuity and efficiency of the system of cycle paths, networks and cycle routes, as well as ensuring accessibility to places and environmental and historical heritage.

- *Municipality cycling plan (2018)*

The municipal Biciplan is planned by art 9 of the Regional Law of the 23rd February 2018, n. 8 "Interventions for the promotion of the new safe and widespread cycling mobility". Municipalities have the opportunity to prepare the Cycling Mobility Plan with the objectives of the Regional Transport Infrastructure Plan, Freight Mobility and Logistics and the Regional Cycling Mobility Plan. Biciplan is a municipal sector plan that must be integrated with other local scale tools such as the urban traffic plan (PUT) and the urban sustainable mobility plan (PUMS).

- **The Environmental sector - Programming and Planning**

- *Regional Economic and Financial Document. 2020 regional programming document. Mission 9 - "Sustainable development and protection of the territory and the environment", Strategic line "Agricultural world and environment".*

The Mission is managed by the Directorate of Environment and Energy Management and its "Services", by the Directorate of Agri-Food, Forestry and Fish Resources, and by the Directorate for Infrastructure and Territory. The protection and enhancement of the environment are considered necessary actions for quality tourism and for attractiveness. The National Strategy on Sustainable Development ⁽²¹⁾ transfers to the Regions the responsibility of adopting a coherent sustainable development strategy through the activation of local governance tools, the involvement of local participants and civilians. The development of the regional strategy considered the 17 Goals and 169 Objectives set by Agenda2030. The guidelines insist on the usefulness of the dissemination of good practices, in terms of management and care of resources, the strengthening of individual needs and sustainable communities and the inclusion of minimum environmental criteria in the design of civil works and plants.

Among the activities envisaged by the Document regarding the promotion of sustainable development and awareness of climate change, there is the creation of "theme- parks", such as green energy parks, and the creation of smart communities. Moreover, the participation in community programs such as the Interreg Europe GPP - STREAM Project and the PREPAIR (Po Regions Engaged to Policies of AIR) project, co-financed with Community funds of the European LIFE 2014-2020 program, represent an essential part of environmental quality promotion policies at the local scale.

• **Other important Laws and regulations**

- *Regional law of August 20th, 2007, n. 23 - "Implementation of Legislative Decree no. 111/2004 on local public transport, freight transport, civil motorization, road traffic and roads";*
- *Regional Law of February 23rd, 2018, n.8 - "Interventions for the promotion of the new safe and widespread cycling mobility";*
- *Regional Landscape Plan (2018).* In this document the Region proposes to protect, enhance and manage the different landscapes and territorial identities, to promote compatible and integrated lines of development. It aims at making environmental heritage, protected areas and historic-cultural buildings accessible to people through the interconnection of slow mobility infrastructures such as cycle paths. The implementation of the Plan's guidelines is envisaged through large-scale tools: "integrated territorial projects" (PIT) and "river contracts";
- *Rural Development Plan (2014 - 2020).* The Region offers also financial resources available to companies, institutions and territories in order to improve the competitiveness of agricultural operators through the preservation and enhancement of ecosystems. This document states that

there is a link between sustainable tourism and agriculture from which both can benefit above all in economic terms.

- Some RDP measures favour the design of large-scale initiatives that integrate the development of agricultural businesses, with the protection of the environment and the landscape, with sustainable and slow mobility.

- **The Transnational, cross-border and interregional programming sector**

The Autonomous Region of Friuli Venezia Giulia promotes transnational, cross-border and interregional cooperation activities in accordance with the Strategic Plans, with the programs and the related funding lines provided by the European Union (both Direct Funds such as Life, and Structural Funds such as ERDF, ESF and FEASR).

Two of the four international cooperation instruments prepared by the European Union are interesting for the territorial repercussions in the transport and sustainable tourism sector: the Eusalp strategy for the Alpine Macroregion and the Eusair strategy for the Adriatic-Ionian Macroregion.

- The strategy for the *Alpine regions* includes 9 different action groups, in particular, the 3rd thematic sector related to "Ensuring sustainability in the Alps: preserving the Alpine heritage and promoting sustainable use of natural and cultural resources", which through action n. 6 proposes "Preserving and enhancing natural resources, including water and cultural resources" and with action n. 7 it aims to "Develop ecological connectivity throughout the EUSALP territory".
- The strategy related to the *Adriatic-Ionian macro-region* aims to deal with the interconnection of the area's systems, both terrestrial and maritime, and to assess the impacts that terrestrial activities determine on coastal and marine ecosystems. Of interest for the themes of the project is PILLAR n. 4 "sustainable tourism" with specific objectives aimed at the "diversification of the tourism products and services of the macro-region and the seasonality of the demand for internal, coastal and maritime tourism" and the improvement "of the quality and innovation of the tourist offer and the improvement of the sustainability and responsibility for tourism capacity of tourism key players in the macro-region", which will be pursued through two topics: "diversified tourist offer (products and services)" and "sustainable and responsible tourism management (innovation and quality)".

Thus said, we would like to add that the Autonomous Region of Friuli Venezia Giulia also has operated on three other levels of European territorial cooperation:

- Cross-border cooperation on the INTERREG Italy/Slovenia 2014-2020, Italy / Austria 2014-2020 and Italy/Croatia 2014-2020 programs and on the INTERREG CENTRAL EUROPE program 2014 - 2020;
- Interregional cooperation - through the use of Interreg Europe 2014-2020, Urbact III and Espon 2020;
- It also used the Connecting Europe Facility (CEF, EU Regulation n. 966/2012) as an EU financial instrument aimed at improving European networks in the transport, energy and telecommunications sectors, in particular, to activate new transport services of people and improve existing ones in order to better connect Friuli Venezia Giulia with Austria and Slovenia.

4.2.3 FVG Regional cooperation schemes and action plans for sustainable tourism and mobility Promotion

Friuli Venezia Giulia is a small region where cooperation among territories, economic sectors, the various key players in the tourism sector and transport service operators, is active. A dense network of relations has allowed the evolution of the various components and the improvement of the possibilities of generating

value. The Region's strategic programming aims at promoting the balanced development of territories and economic sectors, within the various levels of governance, stimulating the adoption of cooperation schemes between the various participants involved.



Location of Friuli Venezia Giulia in the European context

4.2.3.1 Cooperation schemes for sustainable tourism and the promotion of mobility within the macro tourist areas

Through the PromoTurismoFVG Action Plan, the Region has identified 12 macro areas that cover the whole Friuli Venezia Giulia in order to characterize the specific qualities of each one, to promote them to the market and to inform tourists about the events that distinguish the territory, the types of accommodation facilities, the quality of the places, landscape and buildings, the areas of environmental interest, the food and craft products, the itineraries for excursions by bike, e-bike and boat.

Each of the areas is generally accessible from outside and inside, as they are equipped with urban and suburban public road transport services, which allows connections between urban centres and smaller and more distant locations. In some cases, there are rail and tourist transport and intermodal transport services. These areas are often covered by a network of cycle paths and itineraries which guarantee a deeper enjoyment of the landscape, parks, and areas of environmental value by enthusiasts and travellers. Mobility sometimes takes on experiential connotations, if we consider practices such as that of the religious, historical and experiential "Walks".

The model is based on cooperation of the various key players and by territories "organized in destination" that enables the development of an offer to respond to the specific needs of already loyal tourists and new potential customers, both domestic and international.

Collaboration takes place within the areas between:

- the Territorial Unions,
- the tourist consortia, which perform the function of managing, promoting, and marketing the tourist product,
- Information, Reception and Assistance Offices, where they exist,
- Local Development Action Groups, which are responsible for stimulating the growth of mountain and rural areas also through projects integrated with local tourism,
- carriers and companies of road, rail, and maritime transport,

- local associations that promote activities and events and support tourists to the accessibility of the places.

Within each identified context, there is the possibility for the individual traveller, the family and the organized group, to acquire tourist packages and offers ⁽²²⁾ also through on-line booking.

Considering the vastness of the tourist macro-areas, the Municipalities establish collaborative relationships mainly with neighbouring municipalities and do not participate in the more extensive and complex project networks.

This situation rewards the areas where there are cities and urban centres capable of attracting significant tourist flows, and the areas where public and private entities cooperating with each other are active.

The wide range of companies located in the various segments of the supply chain is affected by the positioning of the areas on the tourism market and the choices made by travellers and tourists. The suppliers who are successful are those who in the macro-areas are able to meet the needs of tourists, who intercept scale flows, both domestic and international, and who know how to anticipate market trends and changes in people's tastes, ways of living their holidays and destinations to visit.

The link between Mobility and Tourism is constantly implemented through the promotion of road and rail local public transport services, in order to connect cities, smaller towns and territories rich in environmental heritage, equipped with APPs for users and travellers who want to acquire information and book trips. This link has been further strengthened through the APP of the organization PromoTurismoFvg to promote the discovery of the territory and allow for the booking of tourist packages.

The macro tourist areas identified and that within them generate horizontal and vertical cooperation are:

1. Carnia - claim "a big village, made up of seven valleys that cross the magical Carnic Alps".

- **Cooperation scheme** - within the mountain area operates the Unione territoriale dei Comuni (Territorial Union of Municipalities); the national project "Internal Areas" for the improvement of education and training, health and transport services is being implemented; the "Euroleader" Local Development Action Group acts; in the tourism sector the "Arta Terme - Benessere Alpino" Tourist Consortium and the "Comelico - Sappada" Tourist Consortium intervene; tourists and travellers can be accompanied to experience the heritage of this area by the Carnia Greeters group of volunteers.
- **App** - tourists can buy "tourist packages" through the PromoTurismoFvg app; regarding mobility concerns, users and travellers can require information and book through the app of the road local public transport services provider.
- **Sustainable mobility** - accessibility to heritage and places is ensured by MTB itineraries, by the "Cammino delle Pievi" (Way of the Parishes) and by the route "una Bibbia a cielo aperto" (an open-air Bible).



Carnia's territory and local products

2. **Cividale del Friuli, Natisone and Torre Valleys** - claim "history, art and nature, different languages and cultures, legends and traditions".

- **Cooperation scheme** - within the piedmont and mountain area operates the Unione territoriale dei Comuni (Territorial Union of Municipalities); the Local Development Action Group "Torre - Natisone".
- **App** - tourists can buy "tourist packages" through the PromoTurismoFvg app; users and travellers can require information and book through the app of the road local public transport services provider.
- **Sustainable mobility** - accessibility to heritage and places is ensured by the railway services on the "Udine - Cividale" line, by the widespread system of cycling and e-bike networks and itineraries, by the "Via delle Abbazie" (the Way of the Abbeys) path and by the route of the "44 chiesette votive".



Places and heritages of Cividale

3. **Friuli Collinare area and San Daniele del Friuli** - claim "smooth hills dotted with villages and castles surround a true pearl of art".

- **Cooperation scheme** - the Comunità Collinare and the Municipalities operate within the area by jointly managing initiatives for tourists, travellers and cyclists; the tourist and experiential project "Strada del Vino e dei Sapori" (Wine and Flavours Route) is active for the discovery of the food and wine qualities and localities.

- **App** - tourists can purchase "tour packages" through the PromoTurismoFvg app; users and travellers can require information and book through the app of the road local public transport services provider.
- **Sustainable mobility** - accessibility to heritages and places is ensured by cycling itineraries and the path called "Romea Strata - Allemagna" with the possibility of stopping at the ancient Hospitale dei Crociati of San Giovanni, in the locality of San Tomaso di Maiano.



Places of Friuli Collinare

4. Gemonese - claim "the heart of Friuli, among medieval towns, eco-museums and traditional festivals".

- **Cooperation scheme** - within the piedmont area operates the Unione Territoriale dei Comuni (Territorial Union of Municipalities).
- **App** - tourists can purchase "tour packages" through the PromoTurismoFvg app; users and travellers can require information and book through the app of the road local public transport services provider.
- **Sustainable mobility** - accessibility to heritage and places is ensured by the railway tourist service Sacile - Maniago - Gemona (active in summer) which uses historical locomotives and carriages, by the BiciBus service on the Maniago - Gemona del Friuli route (active in summer), while on the Tarvisio - Venzone - Gemona del Friuli route by the cross-border railway service "treno + bici" (train + bike) Mi. Co.Tra. and the regional local public transport railway service that allows the transport of bicycles, the European cycle route Alpe Adria - Radweg (Eurovelo n. 7), and the "Cammino di Sant'Antonio" (Saint Anthony's Way) and "Cammino Celeste" (Celestial Path).



Places and landscapes of Gemonese territory

5. **Gorizia, Collio and Monfalcone** - claim "Central European charm, rounded hills and excellent food and wine".

- **Cooperation scheme** - the Unione Territoriale dei Comuni (Territorial Union of Municipalities) operates within the area and in a part of the territory there is also the Local Development Action Group "Gal Carso - Las Kras"; in the tourism sector the key players are the Tourist Consortium "Gorizia e Isontino"; the tourist and experiential project "Strada del Vino e dei Sapori" for the discovery of wine and food excellences and the project "Itinerari della Grande Guerra - 1915 – 1918" (Itineraries of the Great War - 1915 - 1918) with open-air museums.
- **App** - tourists can purchase "tour packages" through the PromoTurismoFvg app; users and travellers can require information and book through the app of the road local public transport services provider; Sustainable mobility: accessibility to heritage and places is ensured by the local public transport railway services on the Udine - Gorizia - Trieste line and by the Mi.Co.Tra. "train + bike" cross-border railway service on the Palmanova - Cervignano del Friuli - Trieste Airport route, by the Friuli-Venezia Giulia Trieste Airport, by the BiciBus transport service (active during the summer period), by a widespread system of cycling networks and itineraries and by the walking routes on the symbolic places of the Great War, and by "Cammino Celeste" (Celestial Path).



Places and connections

6. **Grado, Aquileia and Palmanova** - claim "a complete holiday amongst sea and lagoon, archaeology and early Christian mosaics".

- **Cooperation scheme** - the Municipalities of the low eastern plain of Friuli are part of two Unioni Territoriali (territorial Unions); in one part of the Municipalities the integrated sustainable development project called "Mar e tiaris" (Sea and land) and the "Agro Aquileiese inter-municipal

plan of cycling networks and itineraries" are operative; in the tourism sector operates the "Grado Turismo" Consortium.

- **App** - tourists can purchase "tour packages" through the PromoTurismoFvg app; users and travellers can require information and book through the app of the road local public transport services provider.
- **Sustainable mobility** - accessibility to heritage and places is ensured by the cross-border rail service "train + bike" Mi.Co.Tra. on the route Tarvisio - Udine - Palmanova and by the regional rail local public transport service that allows the transport of bicycles, from the European cycle route Alpe Adria - Radweg (Eurovelo n. 7), the cycle route AdriaBike (Eurovelo n. 8), the "Romea Strata - Aquileiense", "Cammino Celeste" and the routes " affreschi nelle Chiese campestri " (frescoes in the country churches)" and "via Flavia".



Places and landscapes

7. **Lignano Sabbiadoro** - claim "an oasis to combine relaxation with all kinds of fun, and a blue flag sea".

- **Scheme of cooperation** - within the area of the low western plain of Friuli operates the Unione Territoriale (Territorial Union) of Municipalities; you can find the tourist and experiential project "Strada del Vino e dei Sapori" (Wine and Flavours Route) for the discovery of wine and gastronomic excellences.
- **App** - tourists can purchase "tour packages" through the PromoTurismoFvg app; users and travellers can require information and book through the app of the road local public transport services provider.
- **Sustainable mobility** - accessibility to heritage and places is ensured by the interregional railway service Venice-Trieste, by the "bus + sea transport" local public transport service, by the widespread system of networks and cycle routes of the Riviera, by the "bike + ferry" transport service on both banks of the river Tagliamento (between the Regions Friuli-Venezia Giulia and Veneto).



Places, landscapes and heritages

8. **Piancavallo and the Friulian Dolomites** - claim "all year open air activities between Piancavallo and the Friulian Dolomites".

- **Cooperation scheme** - within the mountain and piedmont area operates the Unione Territoriale (Territorial Union) of Municipalities and the Local Development Action Group "Montagna Leader"; the national project "Internal Areas" for the improvement of education and training, health and transport services is being implemented; in the tourism sector acts the Consortium "Piancavallo Dolomiti Friulane".
- **App** - tourists can purchase "tour packages" through the PromoTurismoFvg app; users and travellers can require information and book through the app of the road local public transport services provider.
- **Sustainable mobility**: accessibility to heritage and places is guaranteed by the Sacile - Maniago - Gemona railway tourist service (active in summer) which uses historic locomotives and carriages, by the regional local public transport railway service which allows the transport of bicycles on the Maniago - Sacile route, by bike networks and routes and by the "Cammino di San Cristoforo" and the "Frassati path".



Places, landscapes and connections

9. **Pordenone and surroundings** - claim "the city of great cultural events, surrounded by many historical towns".

- **Cooperation scheme** - within the flat area of western Friuli operates the Unione Territoriale (Territorial Union) of Municipalities; in the tourism sector acts the Consortium "Turismo - Provincia Ospitale"; the tourist and experiential project "Strada del Vino e dei Sapori" (Wine and Flavours Route) is active for the discovery of the food and wine qualities and places.
- **App** - tourists can purchase "tour packages" through the PromoTurismoFvg app; users and travellers can require information and book through the app of the road local public transport services provider.
- **Sustainable mobility** - accessibility to heritage and places is ensured by rail services of the Udine - Pordenone - Sacile - Venice and of the Portogruaro - San Vito al Tagliamento – Casarsa lines, by a widespread system of cycling networks and itineraries, by the "Romea Strada - Allemagna",

"Cammino di San Cristoforo" and the "Via delle Abbazie Benedettine" (Benedictine Abbeys Street) route.



Heritages and landscapes

10. **Tarvisio** - claim "renowned mountain resort, Tarvisio is also a meeting point of languages and peoples".

- **Cooperation scheme** - within the area operates the Unione Territoriale (Territorial Union) of Municipalities and the Action Group for Local Development "Open Leader"; the national project "Internal Areas" for the improvement of education and training, health and transport services is being implemented; in the tourism sector operates the Consortium of "Tarvisiano, Sella Nevea and Passo di Pramollo".
- **App** - tourists can purchase "tour packages" through the PromoTurismoFvg app; users and travellers can require information and book through the app of the road local public transport services provider.
- **Sustainable mobility** - accessibility to heritage and places is ensured by the cross-border rail service "train + bike" Mi.Co.Tra. between Villach (A) - Udine (I) - Trieste (I) and by the regional public transport services rail service that allows the transport of bicycles, by the European cycle route Alpe Adria - Radweg (Eurovelo n. 7) and by the paths called "Cammino Celeste" and "Romea Strata - Allemagna".



Places, heritages and connections

11. **Trieste and Carso** - claim "Trieste is a fascinating crossroads of cultures, religions, architectures".

- **Cooperation scheme** - within the area operates the Unione Territoriale (Territorial Union) of Municipalities and the Action Group for Local Development "Gal Carso - Las Kras"; in the tourism sector acts the Consortium "Promotrieste"; is active the tourist and experiential project "Strada del Vino e dei Sapori" for the discovery of wine and gastronomic excellences.
- **App** - tourists can purchase "tour packages" through the PromoTurismoFvg app; users and travellers can require information and book through the app of the road local public transport services provider.

- **Sustainable mobility** - accessibility to heritage and places is ensured by the sea route and the docking of cruise ships in the port, by the "bus + sea transport" service, by the cross-border "train + bike" Mi.Co.Tra. railway service on the Udine - Palmanova - Trieste Airport - Trieste route and by the regional local public transport railway service that allows the transport of bicycles, by the European cycle route AdriaBike Slovenia - Italy (Eurovelo n. 8) and by the historical and experiential route called "via Flavia".



Places, heritages and connections

12. **Udine and surroundings** - claim "the capital of Friuli speaks to you with lively squares, masterpieces by Tiepolo and taverns;

- **Scheme of cooperation** - within the area operates the Unione Territoriale (Territorial Union) of Municipalities.
- **App** - tourists can purchase "tour packages" through the PromoTurismoFvg app; users and travellers can require information and book through the app of the road local public transport services provider.
- **Sustainable mobility** - accessibility to heritage and places is ensured by the cross-border railway service "train + bike" Mi.Co.Tra on the route Villach (A) - Gemona del Friuli (I) - Udine (I) and by the regional local public transport railway service that allows the transport of bicycles, the railway service on the line "Udine - Cividale", the European cycle route Alpe Adria - Radweg (Eurovelo n. 7) and a cycle network with the "Ippovia del Cormor" (Cormor Bridle Path) and the routes of the Torre torrent.



Places, heritages and connections

Some of the tourist areas have been involved in different **European cooperation and planning activities** aimed at sustainable and intermodal mobility and accessibility to cities and territories. These projects are also aimed at crossing and supporting national and European tourist flows along the north-south (Austria - Italy) and east-west (Slovenia - Italy) ridges among which are:

1. Interreg IV Italia – Austria (2007 – 2013)

- this is the organisation of a cross-border "train + bike" rail service called Mi.Co.Tra;

- the project was promoted by the Land Carinthia and the Friuli-Venezia Giulia Region, with the collaboration between the railway companies OBB (Austria) and Ferrovie Udine Cividale S.r.l. (Friuli Venezia Giulia); operational since 2013.



Mi.CO.TRA. between Italy and Austria

2. Connect2CE, Improved rail connections and smart mobility in Central Europe (2018)

- this is the extension of the cross-border service Mi.Co.Tra. from Udine to Palmanova (Unesco city) Trieste Airport and Trieste; operational since 2019.



Mi.CO.TRA. in Trieste

3. Connect2CE, Interreg Central Europe (2014 -2020)

- these are 3 projects and areas of intervention:
 - improvement of public transport connections at regional and cross-border level (2018);
 - development of new info systems - mobility (2018);
 - development of integrated ticketing and pricing schemes with the pilot action "single integrated ticket Italy - Slovenia/Trieste - Ljubljana" (2018).

4 Interreg Italia – Austria, BIKE NAT

- this involves the creation of cycle routes to enhance the natural and cultural heritage;
- through the enhancement of the cross-border territory through specific actions of tourist promotion, the improvement of accessibility to places of tourist and cultural interest, thanks to the implementation of pilot projects dedicated to the elimination of architectural barriers along the Alpe Adria - Radweg cycle route, and the launch of new intermodal and "bike friendly" services.

5 Interreg Italia – Austria, EMOTIONWay (*Eco & soft Mobility Through Innovative and Optimized network of cross-border Natural and cultural Ways*)

- this involves the creation of a cross-border network of cycle routes and paths: the "Eastern Alps Cycle Route Network";
- through the improvement of connections through the inter-modality bicycle - bus and bicycle - train; the provision of new cross-border local public transport services and, once the missing links have been identified, the promotion of pilot measures for intermodal bicycle - bus and bicycle - train connections.

6. Interreg Italia – Slovenia, CROSSMOBY

- This is about sustainable, cross-border, intermodal mobility planning and passenger transport services;
- through the improvement of capacity in sustainable mobility planning and the provision of cross-border public transport connections, based on an institutional cooperation approach and aimed at reducing transport emissions.

7. Interreg Italia – Croatia, MOSES (*Maritime and multimodal transport Services based on Ea Sea-way project*)

- it is about increasing sustainable maritime links;
- through the promotion of pilot actions and feasibility studies between Italy and Croatia in order to organise sustainable passenger connections and improve services for passengers in terminals, and to connect ports to their hinterlands through the adoption of sustainable and innovative modes;



"Ferry + bike" intermodality

8. Interreg Italia – Croatia, ICARUS (*Intermodal Connections in Adriatic-Ionian Region to Up growth Seamless solutions for passengers*)

- it is the promotion of a strategy for intermodal connections in the Adriatic Ionian Macro region;
- through the promotion of sustainable accessibility in relations between the coasts and hinterland, and car-free living areas.

9. Life - Prepair

- the aim is to improve air quality, in accordance with Directive 2008/50/EC and the European "Clean Air for Europe" strategy, in the territories of the Po River Valley and Slovenia;
- through the adoption of integrated actions in the various territories aimed at promoting cycling and local public transport with an impact on the reduction of emissions.

These activities have been complemented by other initiatives, at the European and national level, cross-border and interregional, which have helped to further strengthen the link between transport and tourism in certain tourist areas and territories, among which:

- "train + bike" Mi.Co.Tra. along the route Villach (A) - Tarvisio (I) - Udine (I) - Trieste Airport (I) - Trieste (I), by the railway companies Fuc S.r.l. and OBB Land Carinzia;
- "bike + bus" (experimental during summer) managed by the manager of road transport Arriva Italia, through the subsidiary Saf of Udine, along the Udine - Cervignano del Friuli - Aquileia - Grado route, by Atap S.p.A. along the Maniago - Gemona del Friuli route;
- tourist trains with historical rolling stock (in summer) on the railway line Sacile - Maniago - Gemona del Friuli and on other stretches of the regional railway network, by the Associazione Fondazione FS and the railway transport manager Trenitalia S.p.a.;
- rail link between Udine - Trieste - Ljubljana (experimental) by the rail transport manager Trenitalia S.p.a.,
- "bike + ferry" on both banks of the Tagliamento river, between the Regions Friuli-Venezia Giulia and Veneto (localities involved are Lignano Sabbiadoro and Bibione);
- integrated subscription between public transport services and bike sharing in the main cities of the Region.

4.2.3.2 Cooperation schemes for sustainable tourism and the promotion of mobility within the territorial systems

Some regional areas and smaller localities have been involved in the development of programmes in the fields of environment, agriculture, mobility and tourism that have improved their economic performance, attractiveness for tourists and travellers and accessibility.

The benefits for the territories and businesses have been obtained through the integration of the following types of projects:

- the enhancement of the landscape and the environmental, historical and artistic heritage and local resources of the agri-food sector ⁽²³⁾;
- the connection between cities and coastal and maritime areas, and between cities and mountain and inland areas;
- transnational, cross-border cooperation with Interreg programs (24) and the interregional cooperation in the field of passenger mobility, rail and intermodal transport, cycling tourism (cycling, e-bike, MTB), and experiential paths and trails;
- the implementation of the national programme called "Aree Interne" (25) (Inner Areas) in mountain areas with social and economic fragility.

Some cities and territories are also improving their profile in relation to their ability to attract new flows of tourists and cyclists.

The spread of authentic forms of travel and new trends in the "turismi" (different types of tourism) market, which is increasingly shifting from producers to consumers (so in the pre and post Covid-19 phase), are redesigning the traditional hierarchies of places and affirming new centralities.

Notes

(1) The companies that are part of the Consortium are Apt of Gorizia, Atap Spa of Pordenone and Arriva Italia, through the subsidiary Saf of Udine and the connected Trieste Trasporti of Trieste; LPT Fvg Scarl has a

structure with 1900 employees, 953 buses, 21 equipped depots, 13 ticket offices managed directly and with a widespread sales network while it transports 105 million passengers/year for a volume of 41 million bus/km;

(2) The functions are carried out on the basis of art. 12 "Tourist consortia for the management, promotion and marketing of the tourist product" of the Regional Law of December 9th, 2016, n. 21 "Discipline of regional policies in the tourism sector and attractiveness of the regional territory, as well as amendments to regional laws on tourism and productive activities";

(3) The Consortia distributed over the regional territory are the Arta Terme - Benessere Alpino Tourist Consortium based in Arta Terme, the Comelico - Sappada Tourist Consortium in Sappada, the Gorizia and Isontino Tourist Consortium in Gorizia, the Pordenone Tourism Consortium - Hospitality Province in Pordenone, Consortium for the tourist promotion of the Tarvisio area, Sella Nevea and the Pramollo Pass in Tarvisio, Promotrieste in Trieste, Consorzio Lignano Vacanze in Lignano Sabbiadoro, Consorzio Grado Turismo in Grado and the Piancavallo Dolomiti Friulane Tourist Consortium based in Aviano;

(4) This according to art.8 "the Cycling Mobility Plan of the Inter-municipal Territorial Union of the Regional Law of February 23rd, 2018, n. 8 "Interventions for the promotion of the new safe and widespread cycling mobility";

(5) Regional Law of November 29th, 2019, n. 21 "Coordinated exercise of functions and services between the local authorities of Friuli Venezia Giulia and establishment of regional decentralisation bodies";

(6) The regional Gal are Euroleader operating in Carnia, Carso - Las Kras in Carso, Torre - Natisone in the Valleys, Open Leader in Canal del Ferro - Valcanale and Montagna Leader operating in the Friulian Dolomites;

(7) The main localities of the regional coast such as Trieste - Muggia, Trieste - Grado, Trieste - Sistiana, Marano Lagunare - Lignano Sabbiadoro are served by maritime transport services;

(8) On the railway line there are 48 daily trips frequented mainly by students and subscribers, while there is a limited number of tourists; each of the 6 stop stations is well structured and has automatic ticket issuing and payment equipment;

(9) This service was born from a European Interreg Project and subsequently implemented by a Connect2CE programme, and is organised in parallel with the European cycle route "Alpe Adria - Radweg", part of Eurovelo n. 7, which runs between Salzburg (Austria) and the Adriatic Sea/Grado (Italy/Friuli Venezia Giulia); Mi.Co.Tra. ensures accessibility to mountain and foothill areas, places of historical-architectural value (Venezia) and important cities (Udine, Trieste);

(10) The experimental "bus + bike" service is managed by Arriva Italia through the subsidiary Saf of Udine, it takes place in the period April - June and is dedicated to passengers with bicycles following the buses, while the stops for the loading/unloading of the bikes are concentrated in the towns of Udine, Palmanova, Aquileia and Grado not served by the railway;

(11) The revitalisation of the railway and tourist services are carried out on the basis of National Law no. 128 of August 9th, 2017 "Provisions for the establishment of tourist railways through the reuse of lines in disuse or in the process of being dismantled located in areas of particular naturalistic or archaeological value" and National Law no. 71 of July 11th, 2019 "Entrusting transport services to tourist railways";

(12) Among others, Aria di Festa in San Daniele del Friuli, Tempus est Jocundum in Gemona del Friuli, Mercatino dell'antiquariato in Aviano; the events are accompanied by music and folklore managed by local enthusiasts and associations;

(13) The functions are carried out on the basis of art. 7 "Competences of the Municipalities" of the Regional Law of December 9th, 2016, n. 21 "Discipline of regional policies in the tourism sector and attractiveness of the regional territory, as well as amendments to regional laws on tourism and productive activities";

- (14) On the basis of art. 9 "The Municipal Cycling Plan" of the Regional Law of February 23rd, 2018, n. 8 "Interventions for the promotion of the new safe and widespread cycling mobility";
- (15) The tasks and activities are provided for by art. 8 "Tourist Information and Reception Offices" of the Regional Law of December 9th, 2016, n. 21 "Discipline of regional policies in the tourism sector and attractiveness of the regional territory, as well as amendments to regional laws on tourism and productive activities";
- (16) Among others, Aquileia, Aviano, Buri - Buttrio, Casarsa della Delizia, Cordovado, Castrum Carmonis, Fogliano Redipuglia; Fontanafredda, Vâr - Camino al Tagliamento, Pro Glemona-Gemona del Friuli, Latisana, Manzano, Moggese - Moggio Udinese, Monfalcone, Comunità di Mortegliano, Lavariano e Chiasiellis, Pasian di Prato, Pordenone, Pozzuolo del Friuli, Sacile, San Daniele del Friuli, Nediške Doline - San Pietro al Natisone, Sesto-Sesto al Reghena, Spilimbergo, Sutrio, Tramonti di Sopra, Trieste, Val Resia - Resia;
- (17) The macro tourist areas with the relative claim are the following Carnia - a large village, made up of seven valleys that cross the magical Carnic Alps; Cividale del Friuli, Valli del Natisone and Valli del Torre - history, art and nature, different languages and cultures, legends and traditions; Hilly Friuli and San Daniele del Friuli - smooth hills dotted with villages and castles surround a real pearl of art; Gemonese - the heart of Friuli, among medieval towns, Eco museums and traditional festivals; Gorizia, Collio and Monfalcone - Central European charm, rounded hills and excellent food and wine; Grado, Aquileia and Palmanova - a complete holiday between sea and lagoon, archaeology and early Christian mosaics, Lignano Sabbiadoro - an oasis to combine relaxation with all kinds of fun, with a blue flag sea; Piancavallo and the Friulian Dolomites - outdoor activities all year round between Piancavallo and the Friulian Dolomites; Pordenone and surroundings - the city of great cultural events, surrounded by many historical towns; Tarvisiano - renowned mountain resort, Tarvisio is also a meeting point of languages and peoples; Trieste and Carso - Trieste is a fascinating crossroads of cultures, religions, architecture; Udine and surroundings - the capital of Friuli speaks to you with lively squares, masterpieces by Tiepolo and taverns;
- (18) In the first place, the Regional Law December 9th, 2016, No. 21 "Discipline of regional policies in the tourism sector and attractiveness of the regional territory, as well as modifications to regional laws on tourism and productive activities";
- (19) The PRITML was approved by Decree of the President of the Region n. 300 of December 16th, 2011;
- (20) The PRTPL was approved with Decree of the President of the Region n. 80 on the 15th of April, 2013;
- (21) This Strategy was approved by the Council of Ministers on October 2nd, 2017 and by the CIPE on December 22nd, 2017;
- (22) Tourists and travellers can take advantage of packages and/or offers in relation to the experiences they wish to undertake (art, culture and history, food and wine, slow tour, sea, mountain, bike), to take advantage of the support of guides, to the specific cities, towns and places they want to visit and/or stay, to the preferred holiday period, budget available;
- (23) These projects are activated on the basis of the Rural Development Plan, the Regional Landscape Plan, the Inter-municipal Territorial Union Plan, Development Agencies such as Local Action Groups, Industrial Development Consortia;
- (24) In particular, through the Interreg Italy/Austria, Italy/Slovenia, Connect2CE and Mediterranean;
- (25) The national programme "Aree Interne" (Internal Areas) involved three mountain areas of Friuli-Venezia Giulia, Alta Carnia, Canal del Ferro and Valcanale, Alpi and Dolomiti Friulane, and focused its interventions on health, school and mobility.

4.3 Regional policies, strategies and action plans for sustainable tourism and mobility promotion: Central Macedonia Region

4.3.1 Governance and key actors of the Central Macedonia Region for sustainable tourism and mobility promotion

Central Macedonia Region's levels of governance regarding sustainable tourism and mobility are:

General Directorate of Development and Environment

The General Directorate of Development and Environment [28] implements the general directions of the competent Ministries. It cooperates with the relevant Ministries for the implementation of the existing legislation framework and provides instructions and directions to the respective Directorates of the Metropolitan Unit of Thessaloniki as well as to the Regional Units regarding their mission's execution. In addition, it cooperates with the competent Municipalities and other regional bodies of the Region regarding issues of its competence.

The General Directorate of Development and Environment also implements all strategies and programs designed by the Region of Central Macedonia for its development, competitiveness and environmental protection in its area of responsibility.

Directorate of Tourism

The Directorate of Tourism [29] subjects to the General Directorate of Development and Environment and aims to formulate a policy for the development of the touristic product in the area by promoting actions that will enhance it while it also aims to increase the added value of the tourism sector in the Region of Central Macedonia. It is also responsible for the coordination of all the institutions engaged or interested to be engaged in the tourism sector and for strengthening the tourist culture in the Region's residents.

The Directorate consists of the following departments:

a) Department of Tourism Promotion responsible for:

- The submission of the programs of tourist development and promotion of the Region of Central Macedonia, the support of their actions (preparation, implementation of procedures), the participation in the planning and the preparation of their actions.
- Participation in conferences of tourist content both in Greece and abroad in cooperation (where this is deemed necessary) with other involved services of the Region.
- Cooperation with other Regions of Greece based on tourism promotion, on national strategic plan for tourism as well as studies of international trends in the tourism market.
- The cooperation with bodies, organizations, institutions, etc., on issues of tourist interest or actions for tourist promotion (eg. promotion of local products, etc.) in the Region.
- The utilization of social media and media for tourism promotion in the Region of Central Macedonia.
- The implementation of actions for citizen's awareness regarding the promotion of tourism in the Region of Central Macedonia.
- The completion and preparation of all required administrative documents concerning the Regional Council, for the characterization and delimitation of Areas of Integrated Tourism Development.

b) Department of Tourism Planning and Coordination responsible for:

- The development of the strategic plan of the tourist product in the Region of Central Macedonia.

- The planning of actions for the development of tourism.
- The planning and presentation of European tourism-related programs in cooperation (where this is deemed necessary) by other structures of the Region of Central Macedonia.
- The collection of all tourism product studies as well as the collection and of statistical data and research of new markets.
- Cooperation with other Regions of Greece based on tourism promotion, on national strategic plan for tourism as well as studies of international trends in the tourism market.
- The cooperation with bodies, organizations, institutions, etc., on issues of tourist interest or actions for tourist promotion (eg promotion of local products, etc.) in the Region.
- Participation in conferences of tourist or developmental content in Greece and abroad in collaboration where this is deemed necessary with other involved services of the Region.
- The planning of training programs for the tourist development and promotion of the Region of Central Macedonia in cooperation with the government bodies, the respective provided services of the Regional Units, the Municipalities and the tourism bodies of the Region as well as the implementation of their actions.
- The proposal for participating in European Networks and other extroversion actions.

General Directorate of Planning and Infrastructure

The General Directorate of Planning [30] and Infrastructure is responsible for the long-term planning and the action plan of the Region of Central Macedonia. Within the framework of its responsibilities, it prepares the infrastructure development plans and the sectoral development programs. It is the main executive body of the Region of Central Macedonia and its mission is to prepare the strategic development plan of the Region, to gather sectoral studies and data required for the formulation of development plans and to select the strategic development plan.

Directorate of Strategic Planning

The Directorate of Strategic Planning [31] subjects to the General Directorate of Planning and Infrastructure. It aims at planning, preparing, supervising, controlling and implementing all the training actions, data collection and studies required for the formulation of strategic action plans. It is responsible for studies' update, provision of information to stakeholders, monitoring the implementation of projects by the relevant departments, finding and managing possible financial schemes and resources, promoting national strategic objectives and operational planning, monitoring and evaluation of the Region's actions general development.

It consists of the following Departments:

a) Department of Strategic Planning, responsible for:

- The implementation of plans, the coordination of bodies after their approval, the implementation of the Development Program of the Region and the specialization of the objectives and directions of the development policy of the primary sector, industry, tertiary sector and tourism, as well as the promotion of national strategic goals.
- The implementation of plans, the coordination of bodies after their approval, the implementation of the Strategic plan and the Operational Program of the Region, the annual Action Plans, the proposals for the formulation of the regional development policy and the European Programs co-financed by EU financial resources.
- The preparation of medium-term development programs.

b) Strategic Plan Monitoring Department, responsible for:

- Monitoring the implementation and preparation of final reports for the evaluation of the programs conducted by the Regional Policy Planning Department and elaboration of general and special development studies required for the determination of general and specific directions.
- The final configuration, the distribution of credits, the responsibility for the approval and monitoring of the execution of the annual Public Investment Programs, the investment programs of Central Independent Resources and all kinds of own resources.
- The distribution of the respective amounts and the approval of their disbursement, which is kept by the Regional Development in the Bank of Greece.
- Monitoring and evaluating the planning and implementation of all development and institutional interventions.

Regional Development Fund of Central Macedonia

The Regional Development Fund of the Region of Central Macedonia is a legal entity under the private law subjects to the Region of Central Macedonia. It is responsible mainly for:

- The management of public investment programs.
- The management of financing of public sector bodies and other legal entities.
- The management of European Union financing programs and other international organizations/bodies (Article 3852) 190, par. 2a).
- The technical support of the Region, especially in the elaboration of studies, researches and programs assigned by the Region for better utilization of the resources (Law 3852/2010, article 190, par. 2d).
- The provision of services, the conduct of research, the elaboration of technical and economic studies and the supervision and implementation of programs assigned to the Fund by the Ministries, the Region, the Decentralized Administration and Municipalities and by legal entity under the private law (Law 3852/2010, article 190, par. 2th).

Central Macedonia Region role in tourism promotion:

- Formulate a specific policy for tourist product development and promotion.
- Increase the added value of tourism in the Region.
- Strengthen and promote cultural development in the Region.
- Strengthen thematic tourism and support the creation of thematic routes.
- Promote and develop alternative forms of tourism.
- Promote of social media and marketing tools for tourism promotion.
- Integrate programs in priority thematic formats.
- Create sustainable tourism destination labels.
- Increase tourists' attraction in the Region.
- Strengthen the European and National Network for the Promotion of Thematic Tourism Actions
- Formulate a touristic identity for The Region.
- Promote actions for touristic period expansion.
- Create synergies between regional products.
- Create partnerships with other relevant regions in Europe.

- Create economies of scale at communication level.

Central Macedonia Region role in sustainable transport promotion for tourists

- Enhance access, use and quality of ICT
- Support the shift towards low-carbon transport modes
- Promote sustainable transport and remove bottlenecks in key tourism network infrastructures
- Develop alternative-to-car traffic networks at touristic destinations
- Utilize main infrastructures (ports, airports) to support and increase touristic flows to Central Macedonia

Key regional tourism stakeholders are:

- Public and private transport operators
- Touristic companies
- Municipalities
- Chamber of Commerce
- Hotel Association

4.3.2 The Central Macedonia legislative and policy tools for sustainable tourism and mobility promotion

The main regional policies, strategies and actions plans on tourism promotion and sustainable mobility are:

- Strategic and business plan for the development and promotion of thematic tourism in the region of Central Macedonia (RCM); [32]
 - Regional Operational Program Central Macedonia (ROP, RCM); [33]
 - Operational programme 2015-2019 region of Central Macedonia;
 - Marketing Plan of touristic product in the Region of Central Macedonia (Roadmap 2015-2020), INSETE; [34]
 - RIS3 and Digital Growth Strategy in Greece. Smart Specialization, ICT projects and e-services in the Region of Central Macedonia. [35]
- **Strategic and business plan for the development and promotion of thematic tourism in the region of Central Macedonia (RCM)**

The Region of Central Macedonia envisioning the development of an '*Athropocentric Region which improves the quality of life through actions of quality thematic tourism*' poses the following Strategic Objectives:

Strategic objective 1: Promote the social and cultural development of the Region;

Strategic objective 2: Enlargement of regional development indicators (employment, per capita income, beds, etc.);

Strategic objective 3: Strengthening thematic tourism actions.

These objectives are specialized in intervention axes, taking into account mainly the problems and weaknesses of the Region regarding already developed thematic tourism activities, while also follow the principles of efficiency and effectiveness. Five *intervention axes* are proposed in total, numbering several actions for the promotion of thematic tourism in the Region of Central Macedonia.

- **Intervention axis 1:** Strengthening the public opinion regarding the thematic tourism actions that are being developed within the Region. Actions proposed include:

- *Highlight of the tourism product* through the dynamic promotion and development of alternative forms of tourism;
- *Integration of programs* in priority thematic formats (conference tourism, educational / cultural, athletic, mountaineering, healing, etc.);
- *Support the creation of thematic networks - routes* (wine roads, trails of Alexander the Great, Ottoman and Modern Macedonian and Ottoman Hellenistic times, "steps" to Mount Athos etc.).
- **Intervention axis 2:** Environment protection and quality of life enhancement. Actions proposed include:
 - *Measurers* for preserving local heritage and tackling deterioration;
 - *Adoption* of good behaviour prototypes;
 - *Development* of alternative-to-car traffic networks at destinations.
- **Intervention axis 3:** Development of tourist infrastructure to improve economic and tourist development. Actions proposed include:
 - *Utilization* of public and municipal areas towards thematic tourism infrastructures;
 - *Adoption, development and certification* of environmental and energy management standards for tourism facilities;
 - *Creation* of sustainable tourism destination labels.
- **Intervention axis 4:** Staff training in thematic tourism promotion activities.
- **Intervention axis 5:** Development of necessary electronic applications / tools to promote thematic tourism through new technologies. The action proposed includes:
 - *Utilizing* modern tourism promotion and marketing tools.

Even though there are non-descriptive details regarding the aforementioned actions, it could be said that some of these acts in favour of sustainable tourism via sustainable mobility. A relevant explanation of the possible connection is given in the following table.

Strategic and business plan for the development and promotion of thematic tourism
in the region of Central Macedonia

Intervention Axis	Action proposed for the promotion of thematic tourism	Relevant connection of action with sustainable mobility
1. Strengthening public opinion on the thematic tourism actions being developed in the Region	Support in the creation of thematic networks/routes (wine roads, trails of Alexander the Great, "steps" to Mount Athos etc.)	Thematic routes or integrated programs can be designed in terms of sustainable mobility (use of alternative transport mode, for example a 'bicycle' wine trip)
	Integrated programs in priority thematic formats (conference tourism, educational / cultural, athletic, mountaineering, etc.)	
2.Environment protection and quality of life enhancement	Development of alternative-to-car traffic networks at destinations	Integrated pedestrian and bicycle networks can be designed and implemented for enhancing alternative tourism trips and reduce the use of private vehicle.
5. Development of necessary electronic applications / tools to promote thematic tourism through new technologies	Utilizing modern tourism promotion and marketing tools	Development of mobile applications and tools for tourists focusing on the promotion of sustainable mobility (creation of reward schemes provided to tourists for using the apps and selecting

Regarding the operational objectives these are related to a further analysis of the intervention axes. They are the key steps to achieve the strategic goals and should be quantified. The following operational objectives are proposed with the aim of redesigning negative impacts to positive ones. It is noted that the following operational objectives and proposed actions should be implemented by the Region in cooperation with organizations (e.g. chambers, hotels, regional units etc.) in order to achieve the maximum and desired results.

- **Business Objective 1:** Reduce the seasonality of tourism;
- **Business Objective 2:** Strengthening local / regional business culture in actions of alternative forms of tourism (e.g. exhibitions, promotions, incentives etc.);
- **Business Objective 3:** Provide an integrated platform / tool for presenting thematic tourism activities developed in the Region;
- **Business Objective 4:** Promoting local gastronomic products to increase tourists' attraction in the Region;
- **Business Objective 5:** Strengthening the European and National Network for the Promotion of Thematic Tourism Actions.

Available at: www.shorturl.at/chDO4

- **Regional Operational Program Central Macedonia 2014 – 2020 (ROP, RCM)**

The programme aims to boost economic development and create job opportunities in Central Macedonia. It contributes to the achievement of Europe's 2020 targets for smart, sustainable and inclusive growth, also in line with the smart specialisation strategy. It should create jobs and help SMEs to become more competitive and innovation-driven. EU funding will also contribute to meeting the requirements of the Union's acquis, in particular as regards greenhouse gas reduction in and increase energy efficiency.

ROP, will substantially contribute to the promotion of the following key EU and national development priorities:

- "Strengthening research, technological development and innovation"
- "Enhancing access to, and use and quality of, ICT"
- "Enhancing competitiveness of SMEs"
- "Supporting the shift towards a low-carbon economy in all sectors"
- "Promoting climate change adaptation, risk prevention and management"
- "Preserving and protecting the environment and promoting resource efficiency"
- "Promoting sustainable transport and removing bottlenecks in key network infrastructures"
- "Promoting sustainable and quality employment and supporting labour mobility"
- "Promoting social inclusion, combating poverty and any discrimination - ERDF"
- "Promoting social inclusion, combating poverty and any discrimination - ESF"
- "Investing in education, training and vocational training for skills and lifelong learning"
- "Technical Assistance Axis": provision of technical assistance.

Focusing on the transport sector and in line with the Strategic Europe 2020 framework, the upgrade/expansion of sustainable networks is promoted for achieving the goal of sustainable development. The ultimate goal is the contribution of transport networks in business competitiveness and environment protection.

Based on the needs, the priorities of the regional strategy in the field of sustainable transport focus on improving the accessibility through the development of sustainable transport are:

- The completion of major roads and railways, included in TEN-T as well as port and air infrastructure European and national interest
- Improvement of regional mobility through the connection of secondary and tertiary nodes with TEN-T
- The promotion of infrastructure in order the city of Thessaloniki to become an international transit center
- Upgrade of road safety through the implementation of an integrated application plan
- The development of the gas distribution network in the Region Central Macedonia

Regarding the promotion of sustainable mobility, the main goals focus on:

- Reduction of urban pollution (air, noise) in large cities
- Improvement of urban mobility system by expanding the use of alternative transport modes
- Reduction of travel time and travel cost
- Upgrade of urban environment quality, health and life quality of residents
- Improvement of the cities' image

The promotion of tourism is referred in several investment priorities, where indicative actions for tourism boost are proposed (detailed in the following table).

Regional Operational Programme of Central Macedonia.
Investment priorities and indicative actions for sustainable tourism and sustainable mobility

Selected thematic objective	Selected investment priority	Indicative actions
02. Improving access, use and quality of information and communication technologies	2b. Development of ICT products and services, e-commerce and increasing demand for ICT	Strengthening investment projects of the secondary sector and tourism-culture for the introduction of processes, organizational or promotional innovations, supported by ICT. Digitization and availability of public data in terms of open access. Emphasis on cultural content in order to be used in actions of integrated tourism promotion.
03. Improving the competitiveness of small and medium-sized enterprises	3d. Support the ability of media to grow in regional, national and international markets, and participate in innovation processes	Development of interface and cooperation forms between the tourism sector and other sectors / branches of the regional economy that directly affect the tourism product such as: culture, health, marine and other transport modes, focus on both encouraging new entrepreneurship and upgrading its key competitiveness indicators of tourism sector in the Region. Existing and established companies of the branches that participate in the configuration of the tourist product of RCM to organize informal mergers with the aim of planning and promoting integrated tourism services.
04. Supporting the transition to a low carbon dioxide economy in all areas	4e. Promotion of low carbon emissions strategies for all types of areas, especially for urban areas, including the promotion of sustainable urban mobility and adaptation of	Promotion of alternative environmentally friendly transport systems that will contribute to the decongestion of Thessaloniki city. Development of maritime transport in Thermaikos.

	measures to reduce impact	
06. Protection of the environment and promotion of efficiency resources	6c. Preservation, protection, promotion and development of physical and cultural Inheritance	<p>Interventions in the monuments established as tourist destinations, in order to continue to be poles attracting tourist interest.</p> <p>Interventions in emerging new poles of tourist interest.</p> <p>Interventions in destinations that attract the interest of visitors coming from new tourist markets.</p> <p>Protection and restoration of biodiversity and promotion of ecosystem services, via Natura 2000 network, and green infrastructure.</p>
07. Promoting sustainable transport and removing problems in key network infrastructure	7a. Supporting a multimodal single European transport space through investments in the TEN-T network	<p>Completion of TEN-T road connections.</p> <p>Improvement of regional mobility through the connection of secondary and tertiary nodes with TEN.</p> <p>Promotion of infrastructure in order the city of Thessaloniki to become an international transit center.</p> <p>Upgrade of road safety through the implementation of an integrated application plan.</p> <p>Development of the gas distribution network in the Region Central Macedonia.</p> <p>Upgrade of a railway connection between the port of Thessaloniki with the road network.</p>

Available at: <https://www.espa.gr/el/Pages/staticOPCentralMacedonia.aspx>

- **Operational programme 2015-2019 Region of Central Macedonia**

The Program includes four sections approved in two phases:

- **Phase A:** Section 1- Strategic Plan.
- **Phase B:** Section 2- Operational Plan;
Section 3: Five-Year Action Plan-Economic Program;
Section 4: Monitoring and Evaluation Indicators of the Program.

The general direction the Region will follow for its strategic development in the next five years (2015-2019) is determined as follows:

“Utilization of existing and creation of new competitive advantages through the integration of innovative data and procedures in all sectors of economic development. Focus on on interventions to enhance social solidarity and cohesion and improve the quality of life in the Central Region”.

This direction is in line with the vision and mission of the Region of Central Macedonia, as through innovative actions a new and modern identity will be formulated to boost its competitiveness, economy and quality of life.

Respectively, the strategy of the Region for its internal development is determined as follows:

“Utilization of Information and Communication Technology tools and innovative management tools to simplify administrative processes and improve the quality of services provided”.

The strategy of the Region becomes more specific and understandable through the definition of Strategic Objectives, divided in two general categories, the "Strategic Objectives of Regional Development" and the "Strategic Objectives of Internal Development".

Regarding the transport and tourism sector these are included in the Regional Strategy category, which includes five strategic objectives, focusing on critical issues of development and degradation of quality of life the Region must face as major priority, in order to effectively fulfil its mission and vision.

As obvious, there is a direct connection between the two objectives, as the goals and actions of Strategic Objective 2 are in some cases prerequisites for achieving the goals of Strategic Objective 3. For example, the enhancement of accessibility within the Region as well the upgrade of Thessaloniki's port and airport are expected to increase touristic flows.

Regional development category	
Strategic Objective	Goals/Actions
2. Strengthening of Sustainable Spatial Planning and protection of natural environment	<p>Enhancement of accessibility within the Region</p> <p>Improvement of urban environment quality through the reduction of pollution in the wider metropolitan area of Thessaloniki and other urban centres within the Region.</p> <p>Integration of sustainable urban transport. Focus on smart and alternative transport modes</p> <p>Upgrade of Thessaloniki's port and airport</p>
3. Upgrade and diversification of Tourism- connection with Culture	<p>Extension of the tourist season and creation of a twelve-month tourist season in the Region</p> <p>Development and promotion of alternative forms of tourism</p> <p>Increase of touristic flows through accessibility enhancement within the Region as proposed in Strategic Objective 2.</p> <p>Establishment of Thessaloniki as an attractive 'city break' destination</p>

Available at: www.shorturl.at/jCRTV

- **Marketing Plan of touristic product in the Region of Central Macedonia (Roadmap 2015-2020), INSETE**

According to the Marketing Plan of touristic product in the Region of Central Macedonia, the aim is to form the strong brand- Central Macedonia of enhanced recognition, able to support synergies and new tourism products (modelled on other well-known regions such as Tuscany for Italy, or Southern France). The main benefits are expected to be:

- Creation of synergies between regional products;
- Economies of scale at communication level;
- Creation of new thematic-oriented products that will appeal to more districts and attract more audiences year-round, such as:
 - Wine tours in Central Macedonia,
 - Cultural treasures of Central Macedonia,
 - Majestic nature of Central Macedonia;
- Creation of partnerships with other relevant regions in Europe and the world.

The Marketing Plan is proposed to be promoted through the development of a communication platform providing relative applications regarding touristic themes.

Even though there is not a direct connection with sustainable mobility in the Marketing Plan of INSETE, the promotion of new thematic-oriented products such as wine, cultural and nature tours, could be easily completed through the use of sustainable transport modes. In such a case, the relevant trips could be organized combining different alternative modes of transport. For example, a nature tour could be organized in two phases; bus use for reaching a specific point and specific bicycle or pedestrian paths for the trip's completion.

Available at:

www.regional-tourism-plans.insete.gr/packages/pkm/pdf/marketing_plan_central_macedonia.pdf

- ***RIS3 and Digital Growth Strategy in Greece. Smart Specialization, ICT projects and e-services in the Region of Central Macedonia***

RIS3 is a report summarizing the findings of desk research about the ICT related actions proposed by the regional and national Research and Innovation Strategies for Smart Specialisation in Greece.

Regarding the Region of Central Macedonia (RCM), the development of ICT tools plays a crucial role in the development of sectors characterized as 'champions' and is a strategic policy contributing to sustainable growth. The selected areas are:

- Agri-food,
- Building Materials,
- Tourism,
- Textile and Clothing.

Regarding the area of tourism, the RIS3 strategy for the RCM proposes:

- Creation of imaging applications for presentation and promotion of tourist destinations with new digital media (software to provide advanced services, augmented reality, tourism) for achieving minimize management costs and fees advertising;
- Enlargement of the target groups;
- Expansion of the tourism period.

Available at:

www.komninos.eu/wp-content/uploads/2015/12/RIS3-and-DGS-in-Greece-Final-18-11-2015.pdf

4.3.3 Regional cooperation schemes and action plans on for sustainable tourism and mobility promotion

Central Macedonia Region main cooperation schemes:

Macedonia - Thrace Travel Agents Association

Macedonia - Thrace Travel Agents Association [37] works to promote the development of travel and tourism in Greece, strengthening the spirit of solidarity and cooperation among tourism providers in all aspects of development and quality service combined with the protection and safeguarding of professional and financial interests of its members.

The members of the association are actively involved in professional missions in Greece and abroad and international tourism fairs as well as the annual Thessaloniki International Tourism Exhibition 'Philoxenia'

4.4 Regional policies, strategies and action plans for sustainable tourism and mobility promotion: Epirus Region

Epirus is located in the north-western Greece, between the mountain range of Pindos and the Ionian Sea and combines impressive mountains and a charming seaside scenery. The entire area is run by mountains and rivers which are traversed by wonderful arched bridges.

Nationally, regionally and internationally, the region of Epirus is considered as an ideal location for alternative and sustainable tourism. Its untouched mountainous charm of Pindos with its virgin forests, the mountain lakes, the scenery of singular beauty, as well as the rivers of Epirus offer ideal sources for activities connected to sustainable tourism and mobility promotion such as cycling, kayak, rafting, canoeing etc.

The dedication to policies, strategies and activities related to sustainable tourism and mobility promotion has to go a long way in Greece, however Epirus is active in EU projects, transnational co-operations and policies.

4.4.1 Governance bodies and key actors of the Epirus Region for sustainable tourism and mobility promotion.

Region of Epirus

The Region of Epirus is an independent, decentralized Administrative Unit with responsibilities of planning, coordination and implementation of policies for the economic, social and cultural development of the involved areas. Geographically, it consists of the Regional Unions of Arta, Thesprotia, Ioannina and Preveza. The headquarters are located in Ioannina. The regional governor is currently Alexandros Kachrimanis.

The Region of Epirus has a primary administrative role at a regional level and is concerned with a variety of issues, including environmental, economic, touristic and mobility development. The following departments of the Region of Epirus are particularly focused on the priorities of holistic development in the context of sustainability, mobility and tourism:

- *General Directorate of Development Planning, Environment and Infrastructure*, with the following main responsibilities:
 - Regional planning, investments and development.
 - Environmental protection.
 - Spatial planning.
 - Development of technical infrastructure and transportation.
 - Etc.
- *General Directorate of Development*, with the following main responsibilities:
 - Industrial Development.
 - Development of energy sources.
 - Development of lifelong learning.
 - Trade development.
 - Touristic development.
 - Employment.
 - Etc.

- *General Directorate of Transport and Communications*, with the following main responsibilities:
 - Transportation permits.
 - Technical responsibilities.
 - Etc.

Regional Union of Municipalities of Epirus

The Regional Union of Municipalities of Epirus is a public body that, among its responsibilities, is concerned with the implementation of inter-municipal projects. These are collaborations between Municipalities of the region and, in some cases, these projects include cross-border collaborations, such as the Interreg programs and more.

Moreover, the Regional Union of Municipalities of Epirus is concerned with regional development in the context of tourism, economy and sustainability, focusing on the so-called intangible actions, such as the enhancement of culture, the environment, roads or other public facilities, infrastructure, tourism, and more.

Regional Tourism Service of Epirus

The Regional Tourism Service of Epirus is part of the Ministry of Tourism and is a Regional Organization based in Ioannina.

The responsibilities of the Directorate of Tourism include:

- The collection of supporting documents for the issuance of permits for touristic offices.
- The collection of supporting documents for the issuance of permits for rental vehicles (rental cars and motorcycles).
- The collection of supporting documents for the issuance of a license for rented rooms.
- Auditing of rental rooms and rental classification categories.
- Auditing of touristic buses regarding their contribution to touristic projects.
- Check the eligibility, the qualities and categories of the accommodation businesses in the area.
- Develop and promote the cultural and tourism identity of the area.
- Preserve and implement the unique natural, historical and cultural heritage of the area and reach the right audiences.

The locations of responsibilities of the Regional Tourism Service of Epirus are Arta, Thesprotia, Ioannina and Preveza.

Managing Authority of Epirus

The Managing Authority of Epirus with cooperation with the **Hellenic Ministry of Development & Investments**, a ministry that has close ties and cooperation for development and investments options in tourism areas, via the ESPA funding, started the Epirus OP. A Programme that has close ties with sustainability and aims to contribute to realising the vision of the Region to make Epirus a place worth living; competitive and outward-looking. Some examples of the expected contribution are:

- "Reinforcement of regional competitiveness by promoting innovation and ICT" (ERDF 13.43% of EU allocation)
- "Environmental protection and sustainable development" (ERDF 40.16% of EU allocation)

- "Improving transport infrastructure" (ERDF 22.82% of EU allocation)
- "Reinforcement of educational, health and social infrastructure" (ERDF 8.88 % of EU allocation)

4.4.2 The Epirus region legislative and policy tools for sustainable tourism and mobility promotion

The **Regional Operational Program of Epirus 2015-2019 "AXES and MEASURES"** was a major policy framework that led to the implementation of practical measures and the participation of Epirus in EU projects. The "development vision" of the Regional Operational Program, was developed according to SWOT analysis and approved in September 2011, by the Regional Council. The vision aimed at:

"Life-sustaining, self-sustaining and extroverted development, focused on productivity and comparative advantages that enhance the local identity, with respect for the environment, history and the citizens of Epirus".

On the basis of that, a number of action plans and strategic goals were developed. Among those, the following are particularly focused on tourism, economic development, mobility and sustainability:

- Development, strengthening and organization of alternative forms of tourism and special sports activities for all, directly related to the rich natural and cultural resources of the areas.
- Protection, rational management, utilization and promotion of the physical and residential environment, in connection with the utilization of renewable sources of energy (water potential, forest wealth, agricultural residues, farms, etc.).
- Promoting the cultural heritage as a promotional factor of the local economy.
- Investment in human capital, which will lead to its encouragement of creating new products, processes and services.
- Improving infrastructure, especially in the areas of key roads, management sewage and waste, as well as the modernization of obsolete and insufficient infrastructure in the agricultural sector (land improvement projects, agricultural electrification, etc.).
- Civil-centered operation of the Region, as an administrative unit, with the provision high level of service to citizens and the business community.

Having framed the action goals, policy measures were also developed according to the Operational Program Priority Axis. In the context of sustainable mobility and tourism, the following can be identified:

Priority Axis 1: Strengthening the infrastructure, environmental protection and quality of life

Thematic Goals:

- Transition to an economy of low dioxide and carbon emissions in all areas.
- Promoting climate change adaptation, prevention and risk management.
- Preservation & protection of the environment and promotion of efficient use resources.
- Promotion of sustainable transport and removal of landfills at basic infrastructure networks.

Priority Axis 3: Local economy and employment

Thematic Goals:

- Enhancing research, technological development and innovation.
- Improving the access, use and quality of ICT.
- Improving the competitiveness of small and medium-sized enterprises.

The aforementioned Priority Axis and Thematic Goals, were the foundation for the future investment decisions and participation in EU Programs.

There is also a legislative framework supporting the policies, e.g.:

- **Legislation 1077/1980** about the ongoing education and training for hospitality employees, with article 3, paragraph 4 the Regional Tourism Service of Epirus based in Ioannina. It was structured with the following Departments: a) Tourist Enterprises & Professions and b) Tourism Development - Inspections and Control.

Thus, it is clearly illustrated that, regionally, Epirus has prioritised tourism, sustainability and mobility infrastructure.

4.5 Regional policies, strategies and action plans for sustainable tourism and mobility promotion: Ljubljana Region

4.5.1 Governance and key actors of the Ljubljana urban Region for sustainable tourism and mobility promotion

Slovenia is divided in 12 statistical regions, where Regional Development Organisations are accountable for overall regional development and function as a liaison bodies between the municipal and national level.

Ljubljana urban region lies in the centre of Slovenia and is the economic, administrative, and cultural hub of Slovenia and is therefore also one of the most appealing regions in touristic regards. Regional development agency of Ljubljana urban region supports its sustainable regional development and encourages the networking and development of partner networks between various stakeholders from different areas of expertise, including tourism.

Regional tourism development priorities are governed by national legislation and reflect basic goals of the National Tourism Strategy but with specific regional development goals. There are two most important regional documents that envision region's development in the tourism field:

- Regional Development Programme of the Ljubljana Urban Region 2014-2020;
- Strategy of Tourism Development and Marketing in the Region of Central Slovenia 2017-2022.

Regional Development Programme of the Ljubljana Urban Region is prepared for each programming period. The present one was prepared for the period 2014-2020 and will be succeeded with the programme for 2021-2027 that is currently being drawn-up.

This document is the fundamental regional-level strategic and programming document that harmonises the development objectives in the region and outlines the instruments and resources for their realisation. The document includes a strategic and a programming section. The strategic section features an analysis of regional development potentials, definition of the key development obstacles and strengths of the region, development objectives and priorities of the region over the programming period, and finally determination of the region's development specialisation.

The programming section outlines the programmes for promotion of development in the region with a timeline projection and a financial evaluation as well as determination of the monitoring, evaluation and organisation of the regional development programme implementation.

The most important regional strategy is **Strategy of Tourism Development and Marketing in the Region of Central Slovenia 2017-2022** sets five core strategic goals for regional tourism:

- (1) *Products*: Unique and attractive ITPs have been developed in the region, offering unique, easily accessible experiences and experiential explorations of the region, tailored to different audiences and the length of their visit.
- (2) *Sustainable development*: The region is a well-rounded geographical and tourist entity, with a common green story. A steadily increasing share of tourism stakeholders have proven (certificates) using a sustainable business system, local green chains, and sustainable mobility.
- (3) *Sustainable mobility*: New sustainable mobility systems have been introduced in the region to complement the mobility needs of the inhabitants of the region and are attractive to tourists.
- (4) *Marketing*: The region is presented visually and content in a modern and creative way and clearly communicates the most interesting contents and experiences. It is positioned as a region of easily accessible and authentic experiences that effectively motivates visitors to visit.

- (5) *Coaching*: A well-defined and well-established system of supportive environment at the regional level, which helps daily to meet the challenges and joint operation of the region, thereby delivering better results for both the municipality and the region.

At local level, each mayor and Community Council is responsible for tourism development. Ljubljana urban region comprises of 26 municipalities, pilot implementation area covers 7 of them, namely Municipality of Borovnica, Brezovica, Ig, Škofljica, Vrhnika, Log-Dragomer and the capital, City of Ljubljana.

Municipalities of Borovnica, Brezovica, Škofljica, Log-Dragomer address tourism and leisure development in their general municipal development strategies and other strategic documents on broader level.

Municipalities of Vrhnika and Ig and the City of Ljubljana have adopted following documents that tackle local tourist development:

- Sustainable Urban Strategy of the City of Ljubljana 2014-2020,
- Strategy of Tourism Development in the Municipality of Vrhnika 2015-2020,
- Strategy of Tourism Development in the Municipality of Ig 2018-2027.

Key regional and local tourism stakeholders are:

- **Tourism Ljubljana** is a local tourism organization established by the City of Ljubljana. It fosters development and undertakes promotion of tourism in Ljubljana as well as the wider Ljubljana region. Thus, it also functions as a regional destination organization (tourist board) for 26 municipalities in central Slovenia.
- **RRA LUR** is responsible for the preparation of key development documents in the region and applying for state and European funds.
- **City of Ljubljana** as the national capital and of the most attractive sites in Slovenia and broader. The city has won the title European Green Capital 2016 for its achievements in sustainable urban development.

4.5.2 Regional cooperation schemes and action plans on for sustainable tourism and mobility promotion

Sustainable mobility is one of the focal points of regional development, and it is also one closely linked to tourism. Especially the capital went from being car dominated city to a modern capital with developed pedestrian and cycling networks and public transport.

This practise is now being adapted throughout the region, where following strategies were adopted:

- Sustainable urban mobility plan for Ljubljana urban region,
- Sustainable urban mobility plan for Ljubljana,
- Sustainable urban strategy for Ljubljana 2014-2020 and implementation plan,
- Sustainable Mobility Plan - Electromobility Strategy in the City of Ljubljana.

4.6 Regional policies, strategies and action plans for sustainable tourism and mobility promotion: Zadar Region

The Zadar County is authorized for strategic planning of tourism and mobility at the regional level. The core development document of Zadar County is:

1. Županijska razvojna strategija Zadarske županije 2016. – 2020. – Development strategy County of Zadar

Link: <https://www.zadarska-zupanija.hr/images/dokumenti/Zupanijska%20razvojna%20strategija%20Zadarske%20zupanije%202016.%20-%202020..pdf>

The new strategic framework of Zadar County 2020-2030 is currently being in final stages of preparations. In the field of tourism, the strategic document is:

2. Glavni plan razvoja turizma Zadarske županije 2013. -2023. - Master plan for tourism development in Zadar County 2013 -2023

Link: https://www.zadra.hr/images/dokumenti/izradeni_strateski_dokunmenti/10.pdf

The Zadar County Tourist Board has the basic role of encouraging, preserving improving and advancing all the existing tourist resources in the county. Its basic task is also cooperation and coordination with legal and physical persons with the aim to implement the plan of tourism development as well as to stimulate and assist in the development of tourism in the poorer developed regions. The important role of Zadar County Tourist Board is the development of a plan and program of promoting Zadar county products and of establishing and implementing all the works for promoting the county at home and abroad. The Zadar County Tourist Board has a total of six city tourist offices and nineteen municipality tourist offices and three locality tourist offices. The tourist office representatives meet at monthly coordination that takes place in Zadar County Tourist Board offices.

The tourist offices, besides working on coordination, participate at tourist fairs, manifestations, festivals, or other gatherings essential for the development of tourism in the region. In the mutual actions, good experiences are exchanged and numerous joint activities are organized in order to create new tourist products and resources.

More information about Zadar County Tourist Board could be retrieved from: <https://www.zadar.hr/en/about-us/about-us>. On the same webpage there is information about bike and boat tour: <https://www.zadar.hr/en/experience/itineraries/bike-tour-of-lost-cities>.

4.7 Regional policies, strategies and action plans for sustainable tourism and mobility promotion: Tivat Region

4.7.1 Regional governance and key actors for sustainable tourism and mobility promotion

Due to relatively small size of the country, regional level in planning and policy making doesn't exist in Montenegro. Although, there are some regional initiatives and actions, more or less formal or informal.

For the case of Tivat, regional level could be Boka Bay, where another two municipalities could be named: Herceg Novi and Kotor. This is only geographical regional level, implying that issues related official governance and key actors could not be applied.

Most applicable for this report are cooperation and initiatives of local tourism organizations of Tivat, Kotor and Herceg Novi, especially at international tourism fairs and events. But, even in these cases, participation of other local organizations and national tourism organization is often active and indispensable.

4.7.2 The regional legislative and policy tools for sustainable tourism and mobility promotion

Regional legislative and policy level is not applicable for Tivat area. In line with this, national legislative and policy tools are the only relevant for Tivat area in this report.

4.7.3 Regional cooperation schemes and action plans on for sustainable tourism and mobility promotion

Most important "regional" cooperation schemes is between Tivat and Kotor in segment of Vrmac regional natural park. There is a set of formal agreements between these two municipalities, but formal plan of cooperation is still "in progress". Hilly area of Vramc (785m) is well promoted as "walking paradise".

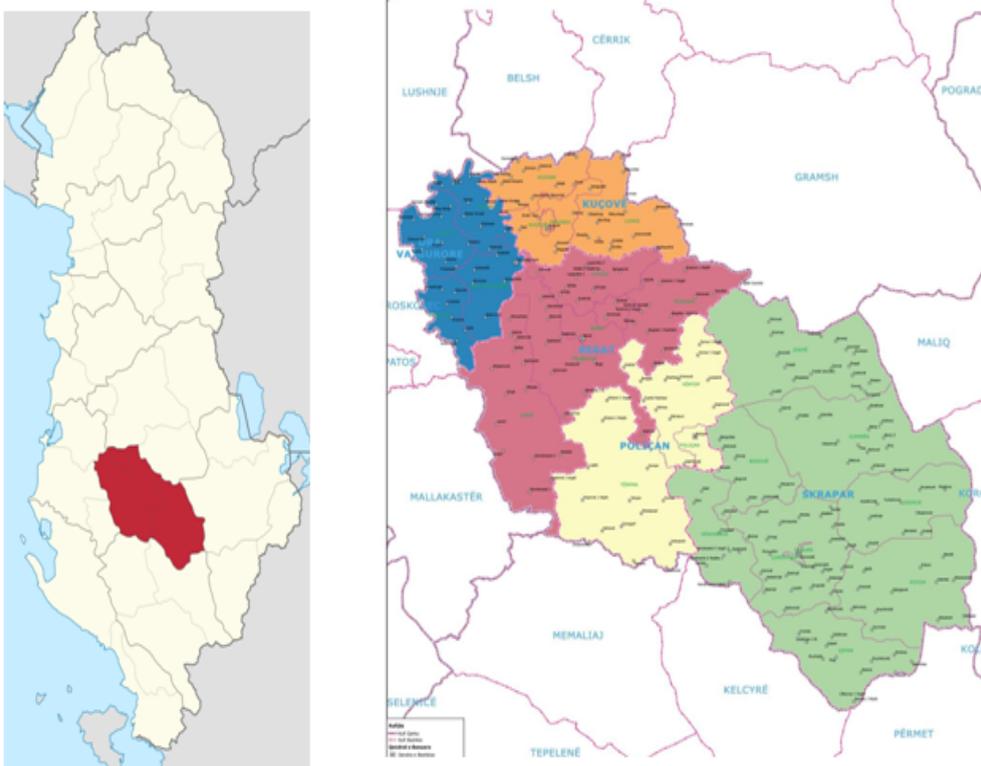
More details about this initiative at: <https://tivat.travel/en/vrmac-walking-paradise/>.

4.8 Regional policies, strategies and action plans for sustainable tourism and mobility promotion: Berat Region

4.8.1 Regional governance and key actors for sustainable tourism and mobility promotion

Berat is located in central Albania, 120 km south of the capital, Tirana. It is the administrative centre of Berat Region and one of two designated ancient museum cities in Albania. Lying on the bank of the Osum River, Berat has been permanently inhabited for close to 2,500 years by Illyrian, Roman, Byzantine, Bulgarian, European medieval, and Ottoman and Albanian civilizations. During the 17th century Berat was the largest city in Albania and the country's main economic centre, with noteworthy development of handicrafts and trade.

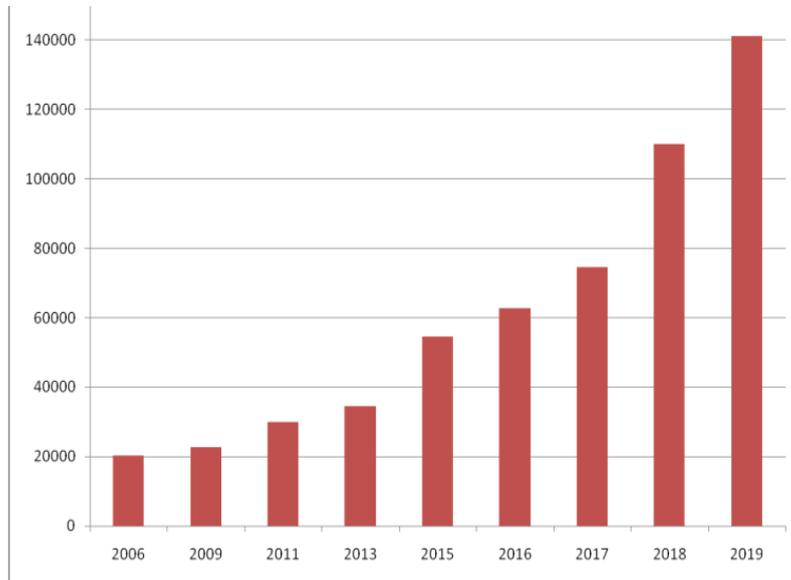
The town bears witness to the peaceful culture and religious coexistence between Christians and Muslims during the Ottoman period. It is a unique town with a wealth of buildings of the highest architectural and historical interest. Recognizing these values, in July 2008, the town was inscribed on the UNESCO World Heritage List.



The map of Albania and the Region of Berat in red (left) - The map of the region and the city of Berat, in red (right)

The rich historical, cultural, ethnographic, architectural and natural heritage values of the town constitute a firm base for tourism development. In turn, sustainable development of tourism has the potential to contribute to the economic, social and environmental development of the region. Berat is already attracting an increasing number of visitors from Albania and abroad, particularly since its World Heritage listing.

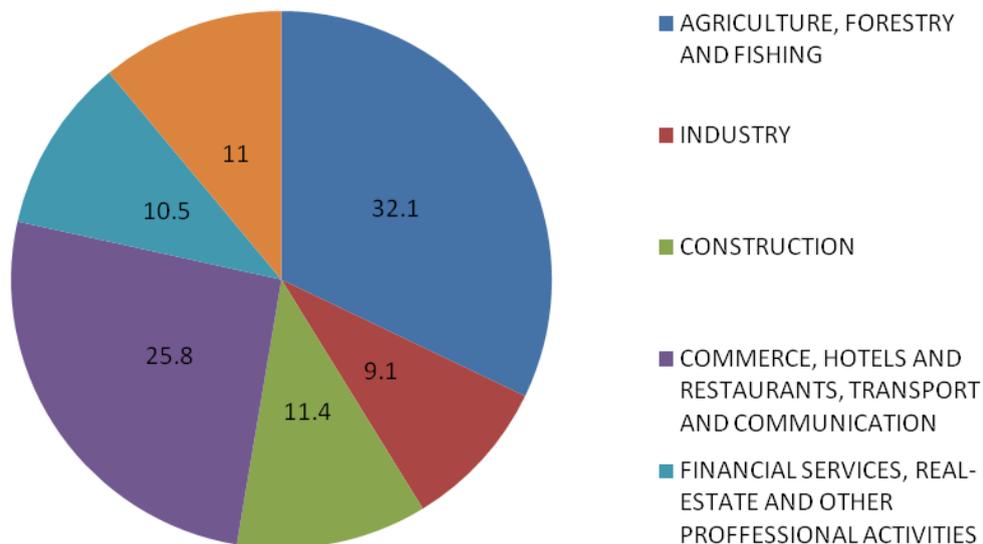
The sensitive development of tourism is identified as a priority objective in **Berat's Strategic Plan for the Social and Economic Development**, while the need to develop in accordance with the outstanding universal value, integrity and authenticity of the town is recognized in the ICOMOS evaluation of the town for World Heritage inscription.



Number of visitors in the city of Berat from 2006 to 2019

4.8.2 The regional legislative and policy tools for sustainable tourism and mobility promotion

The economic situation in Berat Region measured by Gross Domestic Product per capita is slightly larger than the national average. Berat is an region oriented on tourism, agriculture and trade.



Economic sectors – shares in % (2019)

The structure of economy in terms of the number of enterprises shows dominance of the commerce sector, hotels and restaurants, followed by clothing, construction, food-processing and other processing industries at smaller rates

Berat Strategic Plan for the Social and Economic Development

This document identifies the sustainable development of tourism as a priority objective for growth of the local economy. The plan envisions Berat as a World Culture Heritage ancient city, with a community that enjoys harmonious development and equal opportunities, a centre of international tourism with a dynamic economy based on consolidated agribusinesses and handicrafts.

The importance of tourism developing in harmony with the city's unique qualities is recognized in the strategic goals of the plan. i.e.:

- **Strategic goal 1:** An international cultural centre supported by tourism, which preserves and develops the city's unique culture, history and architectural heritage;
- **Strategic goal 2:** Harmonized development of the city's economy, which competes in the regional market through expanding its agribusinesses and handicraft businesses, and where diversity and quality are encouraged;
- **Strategic goal 3:** Coordinated and equilibrated urban development in harmony with the cultural identity of the region, environmentally friendly and innovative;
- **Strategic goal 4:** A high quality, dynamic and all-inclusive social life where equal opportunities for progress and well-being are supported and expanded for all.

4.8.3 Regional cooperation schemes and action plans on for sustainable tourism and mobility promotion

Regional development is a core pillar of economic development for our country. Our regions are vital drivers of the country's economy. Given our natural and comparative advantages, innovative and skilled people and growing export markets, there are significant opportunities for the continued growth of regional economies.

The Regional Development Strategy (Strategy) is a plan to build on the potential of our regions for the benefit of all Albanians. The Strategy is built on the understanding that achieving good regional development outcomes requires a blend of economic and social investment, and ongoing support to ensure the sustainability of our regional communities.

As we move into the next decade, the Strategy harnesses the best knowledge and understanding of what works, and builds on the significant achievements we have made together in recent years. Targeting our regional development effort and investment through the Strategy will deliver the best outcomes.

We are focused on giving greater priority and purpose to the key foundations for economic development and driving new growth and investment in areas where our advantages match national and global opportunity. This will ensure we are focused not only on our current prosperity but on the opportunities for future generations.

There are many public services and functions that are well planned, organized and delivered at the regional level, (e.g. the solid waste management – mobility and transport, waste disposal, the development of tourism and private sector, etc.; areas where actions cannot be effectively implemented only at the municipal level. It is clear that there is a need and a space for "regional intervention".

The vision of the regional development strategy is encapsulated as *"Berat will soon become a region where citizens and their children may live, work, and develop themselves through education, work and social interaction, in good health and within a favorable natural, physical and cultural environment."*

This vision implies:

- A rupture with many existing trends, including institutional and individual attitudes, behaviours and performances;
- A commitment to forge a new form of co-operation across systems and levels of governance;
- A commitment to work for a much greater degree of economic and especially productive performance;
- A commitment to review and change where required, regulatory and other administrative practices that are contrary to the vision of this Strategy;
- A call on national government responsible for various fields within this Strategy to align their policies and practices on this Strategy and to accept the call to engage with the regional partnership to this effect;
- A call on donor organizations to study this vision and strategy, to seek to identify specific actions which they can support;

The vision will be realized through the following strategic objectives and through developmental actions and investments falling under priority areas:

Strategic objectives of the regional development strategy

Strategic Objectives
SO1 – To strengthen the development capacity of actors and institutions within the region to drive the regional development process forward
SO2 – To widen the productive part of the regional economy, esp. in areas capable of generating overall regional income
SO3 – To ensure an appropriate level of accessibility and connectivity of and within the Region, essential for economic and social purposes
SO4 – To value and improve the natural environment of the Region as a key aspect of the Region’s identity and attractiveness, especially avoiding all negative effects on the environment through human activities
SO5 – To ensure adequate provision of essential services to citizens that guarantee good health
SO6 – To develop the capacity of the people and to provide appropriate conditions of fairness, inclusion and opportunity to all so that citizens may optimally participate in the economy and society

The Tourism sector, under the principles and objectives of this strategy, will be developed on joint initiatives between various market actors organized through a Regional Tourism Partnership and on basis of an overall regional tourism strategic plan.

Examples of possible actions that may be pursued in this priority area are:

- Development of Regional Tourism Plan building on existing local strategies but seeking to develop a “regional brand”;
- Product Development relative to nature and activity tourism – especially related to the Canyons in the South East of the Region – leading to a proper visitors’ facility compatible with principles and practices of responsible and sustainable tourism;

- Product Development relating to cultural and heritage tourism and combining element so the entire offer of tourism attractions in the Region (i.e. culture, heritage, nature and activity);
- Joint branding, marketing and direct sales (including a single regional tourism website) and other initiatives – this will be undertaken by the Regional Tourism Partnership when formed (see Priority 1). This will include trails with supporting maps, signals, etc.;
- Definition of regional tourism principles and standards for tourism actors and sites (e.g. voluntary code of conduct linked to inclusion in regional marketing materials and sites) – relating to hospitality standards, minimum competence for persons interfacing with visitors, minimum standards for accommodation (where national standards already exist, regional partnership will seek to go “beyond compliance”).

Berat is a region with a strong touristic potential, specifically for:

- **Cultural tourism** – Berat city has been mainly promoted as an international center of cultural heritage (the traditional neighborhoods of Mangalem, Gorica and Castle , the National Museum of Icons, “Onufri” and other galleries, museums, churches and mosques . The largest numbers of tourists visiting Berat came from Western Europe and Albanians from outside of Albania, staying on average 5 days, mostly in hotels. Most of the visitors are over 45 years of age but the second largest group are visitors under 24.
- **Adventure tourism** The natural monuments of the region lie mainly towards southeast (areas of Bogove, Skrapar with Osumi Canyons, Tomori mountain with its National Park). A prominent example is the “Albanian Rafting Group” the first association of rafting in Albania organizing rafting and canoeing activities in Osumi River (Berat city) and training courses. Other sports like cycling and paragliding are gaining momentum.
- **Agro-tourism and gastronomy:** The region is well known for wineries, agro tourism and gastronomy. A multitude of agro-tourism business have been developed in the city and surrounding areas in the entire region which offer a unique *local* experience.

4.9 Regional policies, strategies and action plans for sustainable tourism and mobility promotion: Belgrade Region

4.9.1 Regional governance and key actors for sustainable tourism and mobility promotion

Belgrade region has two/three different level of governance:

- Regional level/Metropolitan city level
- Municipal and Union of Municipalities level

Improvement of tourist infrastructure and superstructure, revitalization and modernization of ambient units, enrichment of tourist offer within existing products, improvement of promotion of Belgrade as a tourist destination.

Belgrade Region role in tourism promotion (City of Belgrade Development Strategy, Strategic goals, priorities and measures of sustainability development by 2021, City Administration of the City of Belgrade Secretariat for Economy):

- Promotion of the city of Belgrade as an attractive regional, European and non-European one tourist destinations with a unique brand;
- Co-financing of programs and projects of congress, event, cultural and rural tourism;
- Improving the overall tourist offer;
- Improving the program of using new information technologies in tourism;
- Development and implementation of tourist signalization projects on the territory of the city Belgrade;
- Improvement and promotion of tourist zones and ambient units and creating new ones;
- Reconstruction of underground spaces in Belgrade;
- Modernization and enrichment of the souvenir program of the city of Belgrade.

(Source: https://www.begrad.rs/images/file/8482b593767213b8926a3fc6988eca50_1021365819.pdf)

Developing sustainable urban mobility means creating opportunities for more even access to all urban spaces while respecting the basic principles of safety, improving the environment, increasing the efficiency of transport and arranging urban spaces tailored to its users.

Key regional tourism stakeholders are:

- Secretariat for Economy - Sector for Tourism and Hospitality
- Secretariat for Transport
- Secretariat for Public Transport
- The Tourist Organization of Belgrade (TOB)
- Touristic companies
- Provinces and Metropolitan Region
- Municipalities

Brief description of each key stakeholder

- **Secretariat for Economy - Sector for Tourism and Hospitality**
 - encouraging and caring for the development of tourism;
 - preparation of tourism development programs;
 - categorization of the city of Belgrade as a tourist place.

(Source: <https://www.beograd.rs/en/secretariat-for-the-economy/>)

● **Secretariat for Transport performs tasks related to:**

- Establishing an efficient traffic safety system by increasing the level of safety of all traffic participants;
- Technical regulation of traffic on municipal roads and streets in settlements;
- Determining the traffic regime that enables safer and more flowing traffic in regular conditions (directing transit, freight, bicycle and pedestrian traffic, speed limit for all or certain categories of vehicles, determining parking spaces and stopping vehicles, determining roads and streets intended for public transport of passengers, etc.);
- Conditions of temporary occupation of streets (works, events, promotions, supplies, etc.);
- Development of programs and implementation of traffic management with light signaling and application of modern technologies (ITS) in the function of raising the level of traffic safety and increasing the flow of the street network;
- Establishment and development of traffic-geographical information system (GIS) and its exchange with other bodies and legal entities;
- Implementation and development of urban mobility systems, campaigns in the field of transport;
- Establishment and development of an efficient city logistics system;
- Providing conditions for performing communal activities of maintenance and use of public parking spaces;
- Traffic-technical conditions for urban plans;
- Traffic solutions for the preparation of urban-technical and technical documents;
- Public procurement in the field of transport and other activities in the areas within the scope of the Secretariat in accordance with the law, the Statute of the City and other regulations.

The Secretariat for Transport supervises the work of public companies that perform the activity of maintenance of municipal roads, streets in the settlement and state roads (except highways), in the city and the activity of maintenance of public parking spaces, as well as the installation of facilities and means of advertising. Public and other areas.

(Source: <http://www.beograd.rs/en/city-authority/202010-secretariat-for-transport/>)

● **Secretariat for Public Transport performs activities related to public transport of passengers performed on the territory of the city, as follows:**

- organization, manner of performing and using urban and suburban passenger transport, which includes public regular transport by bus, trolleybus, tram, metro, cable car, passenger ship, ferry and boat for commercial purposes, as well as providing places for embarking and disembarking passengers, except for places for which the competence of another organizational unit is prescribed;
- organization and manner of performing off-line transport;
- transport by city railway;
- organization of transport in local liner shipping;
- organization and manner of performing taxi transport;
- issuing a decision on fulfilment of conditions for performing limo service, keeping records of carriers that have the right to perform limo service and determining fulfilment of conditions for performing limo service, and
- other tasks in this area in accordance with the law, the city statute and other regulations.

The Secretariat also performs the following tasks related to:

- drafting normative acts within the scope of the Secretariat;
- deciding in the first instance in administrative matters within its competence;
- conducting public procurement in the field of public transport;
- improving energy efficiency in the public passenger transport system;
- providing license rights and consulting services for "ORACLE ERP" software solutions implemented in the public utility company;
- development of new subsystems and introduction of new subsystems and technologies in the field of public regular passenger transport and informing users;
- study-analytical work in the field of design and construction of traffic infrastructure;
- public transport regimes in regular conditions, as well as in conditions of temporary occupations (works, manifestations, promotions, supplies, etc.);
- management and maintenance of elevators that are in the public ownership of the city and which are an integral part of the equipment of public transport infrastructure in the function of public urban and suburban passenger transport, maintenance of road surfaces in traffic lanes with tram tracks intended exclusively for public transport vehicles and maintenance of green areas within the tram gardens; traffic-technical conditions for planning documentation (spatial and urban plans) and development of urban projects and implementation of a unified procedure in the procedure of issuing location conditions for the preparation of technical documentation;
- tariff policy and revenue control and other activities in the areas within the scope of the Secretariat in accordance with the law, the city statute and other regulations. The Secretariat supervises the work of public utility companies and entities entrusted with the activity of public regular transport.

The Secretariat supervises the work of public utility companies and entities entrusted with the activity of public regular transport.

(Source: http://www.beograd.rs/en/city-authority/1733732-secretariat-for-public-transport_2/)

- ***Secretariat for Environmental Protection***

Consist of:

- Sector for monitoring and environmental protection
- Sector for strategic planning, project management and climate change
- Sector for environmental management
- Sector for legal and economic and procurement affairs
- Waste management sector
- Sector for nature protection and natural resources management

(Source: <http://www.beograd.rs/cir/city-administration/202038-secretariat-for-environmental-protection/>)

- ***The Tourist Organization of Belgrade (TOB)***

The Tourist Organization of Belgrade (TOB) is a public service of the Assembly of the City of Belgrade, founded to conduct activities relating to development, preservation and protection of tourist values on the territory of Belgrade.

Their mission is to promote Belgrade as an attractive tourist destination, preserve and develop tourist, cultural and business values and potentials of the city.

Their vision is for Belgrade to become a desirable tourist destination on the tourist map of Europe, a place visited and revisited with pleasure.

Their objectives are aligned with the Belgrade Tourism Development Strategy.

The TOB mandate includes:

- analysis of national and foreign tourist market;
- planning the development of Belgrade tourism;
- preparation and organization of tourist manifestations;
- development and distribution of tourist promotional material;
- organization and operations of the network of tourist information centres;
- coordination of all participants in the Belgrade tourist offer;
- promotion of souvenirs, handicraft and old craft products;
- promotion of Belgrade in national and international tourist fairs;
- cooperation with other towns in the country and abroad;
- provision of assistance in congress organization.

TOB provides Belgrade visitors with tourist information, organizes sightseeing tours by bus and boat, walks with tourist guides, and assists with the organization of congresses and conferences.

(Source: <https://www.tob.rs/en>)

4.9.2 Belgrade region legislative and policy tools for sustainable tourism and mobility promotion

The main regional policy on tourism promotion is:

- City of Belgrade Development Strategy till 2021

Belgrade city development strategy till 2021

Belgrade city development strategy till 2021 (City of Belgrade Development Strategy, Strategic goals, priorities and measures of sustainability development by 2021, City Administration of the City of Belgrade Secretariat for Economy (Official Gazette of the City of Belgrade, No. 47, dated 30.06.2017)) through measure 5 envisages the improvement and development of tourism through: improvement of tourist infrastructure and superstructure, revitalization and modernization of ambient units, enrichment of the tourist offer within the existing products and improvement of the promotion of Belgrade as a tourist destination.

According to the City of Belgrade Development Strategy the use of new smart technologies, the use of renewable energy sources and the promotion of healthy living habits are the permanent commitments of the City. With the city's development strategy, Belgrade confirms and continues to build its identity based on dynamic river descent, support for sustainable mobility and a change in the transport hierarchy that favours pedestrians, cyclists and public transport.

(Source: https://www.beograd.rs/images/file/8482b593767213b8926a3fc6988eca50_1021365819.pdf)

There are also:

- Action Plan - Development Strategy of the City of Belgrade until 2021 (Official Gazette of the City of Belgrade, No. 47, dated June 30, 2017).

- The plan of general regulation of the construction area of the seat of the local self-government unit - the city of Belgrade (Celine I – XIX) (Official Gazette of the City of Belgrade, No. 20, dated March 21, 2016)
- Amendments to the Regional Spatial Plan of the Administrative Area of the City of Belgrade (Official Gazette of the City of Belgrade, No. 86, dated September 25, 2018)
- General urban plan of Belgrade – (Official Gazette of the City of Belgrade No. 11/16).
- The main regional policies on sustainable mobility promotion are:
 - City of Belgrade Development Strategy till 2021
 - "Belgrade's Sustainable Urban Mobility Plan that is in progress (SUMP - Sustainable Urban Mobility Plan, Final Report, february 2020, City of Belgrade, Secretary for Transport).

Belgrade's Sustainable Urban Mobility Plan (in progress)

"Belgrade's Sustainable Urban Mobility Plan" is the project that was initiated by the City Council of Belgrade in cooperation with the Secretariat for Transport and is being managed by the Center for Urban Development Planning. The main goals of the project are to improve the quality of life by reducing the negative impacts of traffic on the environment, improving the transport network and improving public transport services, establishing good links between different modes of transport, accessibility and accessibility for more citizens, and promoting non-motorized modes of transport.

The Sustainable Urban Mobility Plan (SUMP) for Belgrade is document that is in progress and is an innovative way of planning the city's transport and urban system that meets, in a sustainable way, primarily the needs of the people. The goals of such transport system planning are accessibility to the destination and services, increase of traffic safety, reduction of greenhouse effects and consumption of fossil fuels, increase of attractiveness of city contents, increase of quality of life, healthier environment and reduced harmful impact on citizens' health.

(Source:

http://bgsaobracaj.rs/uploads/files/%D0%9F%D0%9E%D0%A3%D0%9C/POUM%20BG_nact_Zavrzni%20Izv%20estaj_web_compressed.pdf)

The existing regional/local policies reflects the principles of sustainable development are not yet in place fully harmonized and coherent.

4.9.3 Regional cooperation schemes and action plans on for sustainable tourism and mobility promotion

Belgrade main cooperation scheme:

- ***Tourist Organization of Belgrade***

In promoting Belgrade as a tourist destination, the TOB, as a destination management organization, aggregates information on tourist services provided by hotels, restaurants, tourist agencies, souvenir manufacturers and artisans, manifestation organizers and all other professions that provide services for tourists visiting Belgrade.

(Source: <https://www.tob.rs/en>)

5. Strategical, political and legislative frameworks for sustainable tourism promotion at local/pilot level

5.1 Local policies, strategies and action plans for sustainable tourism and mobility promotion: Emilia-Romagna Region pilot

Within the many regional schemes and strategies in support of a sustainable tourism in the region of Emilia Romagna, there are also some local initiatives that are focused on the Romagna side of the region, both on the coast and the hinterland. This is the area where the SUSTOURISMO pilot will also be developed. This paragraph reviews some of the initiatives in support of sustainable tourism in Romagna.

- ***Carta of Cervia Milano Marittima (2017)***

The Carta, signed by the Ministry of the Environment, the Emilia-Romagna Region, institutions and local businesses, brings together all the stakeholders around the 19 points of the document that projects the great world decisions, starting with the Paris Agreement on climate change, on the complex challenges of the Emilia Romagna coast, not only in relation to the summer season but throughout the whole year. The document aims to initiate a significant transformation of seaside tourism in the towns of Cervia and Milano Marittima in the direction of environmental sustainability and the protection of biodiversity in the Emilia-Romagna coast. The signatories undertake to "work to ensure that structures (hotels, establishments, restaurants, shops) become increasingly green, combining economic development and respect for the environment, encouraging the growth of 'green oriented' seaside holidays". "In this direction - continues the Charter - renewable energies, energy efficiency of buildings, adaptation to climate change, separate collection, soft and sustainable mobility, the fight against waste and urban decay are of primary importance".

- ***Green booking: together for a greener Riviera***

Green booking is a platform that was launched in 2016 in support of a more sustainable type of tourism in the Romagna coast. On the Emilia Romagna coasts, every summer there are on average 37 million visitors with huge CO2 emissions: rethinking tourism with a view to sustainability is a need for everyone, citizens and tourists. With this in mind, Green Booking's goal is to create new public green areas or plant new trees in existing areas, contributing to urban redevelopment, the restoration of nature, awareness and commitment to the environment. Hotels can get into the platform by giving a financial contribution to the municipality they belong to, and this money will be used for planting new trees.

- ***Sustainable tourism in Alto Rubicone***

This is a web portal dedicated to sustainable tourism in the area of Alto Rubicone in Romagna. The idea of the project is to give information about where to go eat, sleep, where to go walk or doing sport in a "slow" way. Information on cultural activities and events are also given.

- ***Wine and food tour – eco-sustainable tourism in Riviera Romagnola***

In this portal dedicated to wine and food, a journal of food and travel, there is a webpage dedicated to the eco and sustainable tourism in the Riviera. Besides explaining what eco-sustainable tourism is about, it indicates the eco and sustainable hotels and the reasons for choosing them between the others.

- ***Project for the development of a sustainable tourism in San Marino, Marche and Emilia Romagna regions***

The “Tavolo territoriale per il turismo” (Territorial table for tourism), a qualified working group represented by the State of San Marino and the regions of Marche and Emilia Romagna, has started in the summer 2020 a project for the development of a sustainable tourism. Aim of the project is to coordinate a touristic offer capable of enhancing the common excellences of a vast, unique territory rich in holiday opportunities, events, sports and culture with an innovative approach that allows to share values and ideals, based on sustainability.

- ***Ecobnb – a sustainable guide of Emilia Romagna***

Ecobnb is a blog that helps organizing holidays in a sustainable way. It covers the whole Italian territory, so by choosing Emilia Romagna, it indicates eco-sustainable hotels, restaurants and tours in each province. Slow itineraries, places where km 0 food is offered, ecofriendly b&b and parks are within the hints given by this blog.

5.2 Local policies, strategies and action plans for sustainable tourism and mobility promotion: Friuli-Venezia-Giulia Region pilot

Complex territorial systems emerge in the Region with

- active **key players** who cooperate with each other to prepare projects and events,
- **companies** and supply chains able to understand and anticipate market changes,
- **skills** in attracting tourist flows and consolidating the transport and tourism link,
- **accessibility** to cities, places, heritage, landscapes, local productions,
- **flexibility** accommodating tourists who increasingly choose "authentic" destinations, want "narratives" and physical and inner well-being.

This dynamic process brings out among the other 4 system areas:

1. Val Canale, Canal del Ferro and Gemonese

This is a territory, on the border of Austria and Slovenia, which includes part of the two macro tourist areas "Gemonese" and "Tarvisiano", which develops along a north-south direction, from Tarvisio (border with Austria), which has two towns such as Venzone and Gemona del Friuli completely rebuilt after the 1976 earthquake and three important natural heritages (Tarvisio forest, Regional Natural Park of the Julian Prealps, Val Alba Nature Reserve);

- the **cooperation** is
 - **institutional**, and takes place within the territorial Unions of Municipalities and the national project "Aree Interne" (Internal Areas);
 - **tourism**, which involves the Consortium of the "Tarvisiano, Sella Nevea and Passo di Pramollo" and the local Information, Reception and Assistance Offices;
 - **economic**, through the activities of the "Open Leader" Local Development Action Group.
- the **link** between sustainable transport and tourism is achieved through:
 - the cross-border railway service "train + bike" Mi.Co.Tra. between Villach (Austrian railway node for the arrival/departure of trains to Munich, Vienna, Warsaw, Prague, Budapest) and the stops in Tarvisio, Venzone and Gemona del Friuli;
 - by the regional LPT rail service that allows the transport of bicycles on the Trieste-Tarvisio route;

- the tourist railway service Sacile - Maniago - Gemona (summer period), along an east-west route, with the use of historical rolling stock;
- the BikeBus service on the east-west Maniago - Gemona del Friuli route (summer period);
- by the European cycle route Alpe Adria - Radweg (Eurovelo n. 7), Salzburg (Austria) - Adriatic Sea (Grado), which is used by travellers coming from central-eastern Europe, and by a regional cycle route called Fvg.3 "Ciclovía Pedemontana e del Collio", which runs along a westbound route connecting the province of Pordenone (Maniago) with the province of Udine (Gemona del Friuli) and Gorizia (Gorizia);
- the Paths called "Camino Celeste", "Camino di Sant'Antonio" and "Romea Strata - Allemagna";
- the territorial impact of the Interreg IV Italy - Austria programmes from Connect2CE, Improved Rail Connections and Smart Mobility in Central Europe;
- the possibility to purchase "tourist packages" through the PromoTurismoFvg App and for users of local public transport services to inquire and book through the App of the road Ipt services provider.

2. Grado, Aquileia and Basso Isonzo

It is an area of 313 square kilometres (including 90 square kilometres of lagoon) and with a population of 54 thousand inhabitants, which includes the whole tourist macro-area "Grado, Aquileia and Palmanova" and a part of the macro-area "Gorizia, Collio and Monfalcone", and is located in a portion of the regional territory including the sea and the plain, the Unesco cities (Aquileia, Palmanova), historical cities (Grado, Aquileia, Palmanova), maritime cities (Grado) and rural resorts (Fiumicello, Terzo di Aquileia, San Canzian, Turriaco), and consists of two important natural heritage sites : the Marano and Grado Lagoons and the Regional Nature Reserve of Focè dell'Isonzo (the mouth of the Isonzo river) and Valle Cavanata.



Territories of Grado, Aquileia and Basso Isonzo

- the **cooperation** is

- **institutional**, which takes place within the Territorial Unions of Municipalities, in the context of the integrated sustainable development project called "Mar e tiaris" (territorial cooperation project involving 10 municipalities) and the "Agro Aquileiese inter-municipal plan of cycling networks and routes";
- **tourism**, where the "Grado Turismo" and "Gorizia e Isontino" Consortia act to manage 2.5 million tourists per year, and the local Information, Reception and Assistance Offices; the "Strada del Vino e dei Sapori" (Wine and Flavours Route) tourist and experiential project is active to discover the food and wine qualities and places.
- the **link** between sustainable transport and tourism is achieved through:
 - the implementation of the Rural Development Programme (RDP) 2014-2020;
 - the cross-border railway service "train + bike" Mi.Co.Tra. between Udine and Palmanova (Unesco city) and Trieste Airport;
 - the BikeBus (BiciBus) service on the north-south route Grado - Aquileia -Palmanova -Udine, and east-west Grado - Isonzo (active in summer);
 - the European cycle route Alpe Adria - Radweg (Eurovelo n. 7) Salzburg (Austria) - Palmanova - Aquileia - Adriatic Sea (Grado), which is used by travellers coming to Central and Eastern Europe and tourists staying in Grado and Aquileia, and the European cycle route Adriabike (Eurovelo n. 8) Slovenia - Italy, to which a widespread system of cycling networks and routes is attached;
 - the paths called "Cammino Celeste" and "Romea Strata - Aquileiense" and the paths " affreschi nelle Chiese campestri "(frescoes in the country churches) and "via Flavia";
 - the territorial impact of the programmes Interreg IV Italy - Austria, Connect2CE (Improved Rail Connections and Smart Mobility in Central Europe), Interreg Central Europe, Interreg Italy - Austria BIKE NAT;
 - the possibility to purchase "tourist packages" through the PromoTurismoFvg App and for users of local public transport services to inquire and book through the App of the road LPT services provider.

3. Valleys and Friulian Dolomites

This is a territory that includes a large part of the tourist macro-area "Piancavallo and Friulian Dolomites" and combines the western mountain side with the foothills of Friuli Venezia Giulia. It is characterized by high historical and environmental heritage such as the UNESCO World Heritage Natural Park and the Magredi (an area on the high plain of Pordenone's province where rivers Cellina and Meduna sink into the aquifer) and a manufacturing production of international value (knives, blades);

- the **cooperation** is
 - **institutional**, which takes place within the framework of the Territorial Union of Municipalities and the national project "Aree Interne" (Inner Areas);
 - **tourism**, where the "Piancavallo Dolomiti Friulane" Consortium and the local Information, Reception and Assistance Offices act, and local groups and associations intervene for the promotion of events;
 - **economic**, where the Local Development Action Group "Montagna Leader" and the Consorzio per il Nucleo di Industrializzazione della Provincia di Pordenone (Cnip) operate.
- the **link** between sustainable transport and tourism is achieved through:
 - the local public transport train service on the Maniago - Sacile route where bicycles can also be transported;

- the tourist railway service Sacile - Maniago - Gemona (active in summer), along an east-west route, with the use of historical rolling stock;
- the BikeBus service on the east-west Maniago - Gemona del Friuli route (active in summer);
- from the regional cycling ridge called Fvg.3 "Ciclovía Pedemontana e del Collio" which develops along an east-west route and connects the province of Pordenone (Maniago) with the province of Udine (in Gemona del Friuli where it connects to the European cycle route Alpe Adria - Radweg) and Gorizia (Gorizia), and from a network of cycle paths and itineraries;
- the Path called "Cammino di San Cristoforo" which, for one part overlaps another Path ("Romea Strata - Allemagna"), and the "sentiero Frassati";
- the territorial impact of the Interreg project programmes "Pro-Byke", which proposes the creation of good practices and solutions for the improvement of sustainable mobility and the strengthening of services in sustainable tourism, and of the Interreg Italy - Austria EMOTIONWay, for the protection and development of natural and cultural heritage through the creation and connection of a cross-border network of paths and cycle paths and for the strengthening of inter-modality "bus + bike" and "train + bike";
- the possibility to purchase "tourist packages" through the PromoTurismoFvg App and for users of local public transport services to inquire and book through the App of the road LPT services provider.

4. Trieste e Carso

It is a territory located on the border with Slovenia that entirely includes the tourist macro-area "Trieste and Carso", where a large central European, multi-religious, scientific and port city such as Trieste is integrated with a suggestive and protected landscape like Carso; Trieste is the "gateway to the Mediterranean" to Central Eastern Europe for goods and cruises;

- the **cooperation** is
 - **institutional**, which takes place within the territorial Union of Municipalities and with the Port System Authority of the Upper Eastern Adriatic;
 - **tourism**, where the "Promotrieste" Consortium and the local Information, Reception and Assistance Offices act, and the associations work for the promotion of international events; the tourist and experiential project "Strada del Vino e dei Sapori" (Wine and Flavours Route) is active for the discovery of the food and wine qualities and places;
 - **economic**, where the Local Development Action Group "Gal Carso - Las Kras" operates.
- the **link** between sustainable transport and tourism is achieved through:
 - the port/terminal quay dedicated to the docking of large cruise ships;
 - the cross-border rail service "train + bike" Mi.Co.Tra. Villach - Tarvisio - Udine - Trieste Airport - Trieste,
 - by the regional PLT rail service that allows the transport of bicycles on the Trieste-Tarvisio route;
 - the "bus + sea transport" service; the European cycle route AdriaBike Slovenia - Italy (Eurovelo n. 8) and a network and cycle routes on Carso and towards Slovenia;
 - the historical and experiential route called "via Flavia";
 - the territorial impact of the Connect2CE (Improved Rail Connections and Smart Mobility in Central Europe), Interreg Central Europe (regional and cross-border public transport connections, info - mobility systems, single integrated ticket Italy - Slovenia/Trieste - Ljubljana), Interreg Italy - Slovenia CROSSMOBY (for mobility planning and passenger transport services, sustainable and cross-border,

and for the provision of cross-border public transport connections based on a cooperation approach aimed at reducing emissions), Interreg Italy - Croatia MOSES (to increase sustainable maritime connections and improve passenger services in terminals) and Interreg Italy - Croatia ICARUS (to improve intermodal connections in the Adriatic Ionian Macro region through sustainable accessibility between coasts and hinterlands);

- the possibility to purchase "tourist packages" through the PromoTurismoFvg App and for users of local public transport services to inquire and book through the App of the road LPT services provider.

5.3 Local policies, strategies and action plans for sustainable tourism and mobility promotion: Thessaloniki Region pilot

5.3.1 Governance and key actors of the Central Macedonia Region for sustainable tourism and mobility promotion

Thessaloniki Municipality levels of governance regarding sustainable tourism and sustainable mobility are [38]:

- ***Directorate of Sustainable Mobility and Networks***

The Directorate of Sustainable Mobility and Networks is responsible for studying, constructing and maintaining roads, sidewalks, bicycle lanes and power grids as well as managing traffic issues. It consists of the following sections:

- Department of Traffic Planning
- Office of Pedestrian and Accessibility
- Department of road construction and road signing
- Department of traffic lights
- Department of road licenses and control
- Department of Administrative Support

- *The Department of Traffic Planning*

Prepares, supervises or assigns transport studies for the improvement of urban mobility, the formulation of the Municipality opinion regarding the design and operation of all public transport systems, the parking management and other services related to the transport and supply road networks. It is also responsible for traffic regulations and traffic arrangements (one-way streets, road priorities, etc) and suggests the issuance of regulatory decisions related to traffic and parking management issues.

- *The Department of Pedestrian and Accessibility*

Records, requests and remarks of citizens regarding the existing problems. Studies and recommends the implementation of necessary administrative measures in order to ensure:

- the application of sustainable mobility principles for pedestrians and cyclists
- easy accessibility for people with disabilities

Collects relevant data, monitors technical and legislative developments, designs, cooperates, informs and controls Services for the integration of specifications for ensuring the accessibility for disabled people in all projects of the Municipality related to urban renovations

Collaborates with other bodies, associations and Non-Profit Organizations (NGOs) for

- exchanging relevant information and data regarding the above issues
- elaborating or participating in local, national and community programs (in cooperation with the Department of Business Planning & Development)
- organizing workshops and actions related to pedestrians, cyclists and people with disabilities needs
- Raising awareness of Public Authorities, employees and the public about understanding them the needs and rights of pedestrians, bicycles and people with disabilities, both live and in the media.

- *Directorate of Culture and Tourism*

The Directorate of Culture and Tourism promotes arts and culture, organizes national and international festivals and cultural events, manages municipal spaces for the above purpose, organizes touristic programs and develops collaborations for the promotion of the Municipality. The Department of Culture and Tourism includes the following departments:

- Department of Tourism
 - Department of events and festivals organization
 - Office of Municipal space management
 - Department of Municipal Music Schemes
 - Department of administrative support and events' management and promotion
- *The Department of Tourism is responsible for:*
 - Keeping records and data concerning the current situation of tourism within the Municipality.
 - Collaborating with relevant stakeholders of the city for the implementation of intervention actions to promote tourism in the city and upgrade the provided touristic services.
 - Planning and implementing national or international programs and actions of tourist promotion within the Municipality.
 - Developing information services for visitors in the area.
 - Taking care of cultural tourism promotion.
 - Coordinating internal communication with other Municipality's departments related directly or indirectly to the national and international general touristic actions.
 - Examining issues of tourist demand and supply through the detailed analysis of relevant statistics and the evaluation of tourism activity results in the local economy, population and environment.
 - Collaborating with relevant stakeholders for the promotion of local tourism products.
 - Implementing best practices of other Greek or European Municipalities.
 - Studying the construction of tourist infrastructures such as marinas, conference centers, etc.
 - Representing the Municipality in national or international bodies/associations and creating cooperation schemes for the promotion of tourism development and promotion in the Municipality.
 - Granting bodies for developing cultural activities to the territorial jurisdiction of the municipality, as well as those contributing to its tourist development and promotion.

5.3.2 The Thessaloniki legislative and policy tools for sustainable tourism and mobility promotion

The main regional policies, strategies and actions plans on tourism promotion and sustainable mobility are:

- ***Sustainable Urban Mobility Plan of Thessaloniki, 2020***

The Sustainable Urban Mobility Plan of Thessaloniki was completed in July 2020, and is under approval by the Municipality of Thessaloniki. The main objective is a new 'city syntax' promoting the use of alternative transport modes for the upgrade of the urban environment for both residents and visitors of the city and the reduction of environmental pollutants. Thessaloniki's SUMP was conducted in full agreement with the guidelines, terms, procedures and other details for the preparation of Sustainable Mobility Plans of Law 4599/2019, also taking into account the updated European Eltis guidelines. Three alternative strategic scenarios were proposed and examined, including specific measures and interventions for the city of

Thessaloniki. The selected scenario proposed a number of measures and interventions. The following are directly connected with the promotion of sustainable tourism via sustainable mobility.

- Reorganization of the Public Transport System
- Design and implementation of touristic trails connecting points of interest
- Recreation of the old seafront
- Creation of an integrated pedestrian network
- Creation of an integrated bicycle network
- Creation of low traffic zones in areas of touristic interest

- ***Municipality of Thessaloniki Marketing Plan***

The Municipality of Thessaloniki proposes a new marketing plan for tourism boost, focusing on social media, open data and special tourism categories [39]. The Department of Tourism plans to cooperate with agencies aiming to create an innovative campaign that will take advantage of the attractive elements of Thessaloniki (e.g. culture, history, gastronomy, art events, conferences, major international events, short getaways, etc.) for reaching future visitors.

It also plans to use internet and social media tools taking into account the new trends and the profile of modern tourists visiting the city of Thessaloniki. In this context, online services are planned to be created on the website of the Municipality, digital applications in archaeological sites, historical monuments and points of special interest. The Municipality also plans to use open data sources, inviting citizens to propose thematic paths (food paths, historical paths, dark tourism paths, alternative paths, memorial paths, etc.), which will be included on the websites of the Municipality of Thessaloniki. Taking into account the citizens' opinions and proposals, the relative thematic paths will be developed under the sustainable mobility spectrum (upgrade of existing pedestrian and bicycle paths or creation of new ones)

Finally, the Municipality seeks to strengthen special tourism categories (e.g. Thessaloniki Food Festival, Open House Thessaloniki, Flea Markets, etc.) in order to highlight the diverse character of the city, by continuing some of the already successful actions while also adding new ones. The above plans are all connected with the promotion of different mobility forms, such as use of alternative transport modes (walking, bicycling, use of public transport) and the provision of information mobility services through mobile applications for the trips' completion.

Available at:

<https://www.voria.gr/article/epikinoniaki-ekstratia-d-thessalonikis-gia-na-proselkisi-touristes>

- ***Resilient Thessaloniki – A Strategy for 2030***

In 2014, the city of Thessaloniki was selected to join the 100 Resilient Cities (100RC) network [40]. Given this opportunity, a holistic, long term strategy was developed, in collaboration with adjacent municipalities, local academic institutions, private stakeholders, citizens and communities of the city. The Resilience Strategy is based on eight city values (Social Cohesion, Local Identity & Heritage, Environmental Management, Health & Wellbeing, Youth Empowerment, Multi-stakeholder Engagement, Technology Adaptation, Economic Prosperity), representing the city's identity and guiding the plan for the future. The values cut across four main goals that together form the basis of the strategy:

- Shape a thriving and sustainable city with mobility and city systems that serve its people
- Co-create an inclusive city that invests in its human talent
- Build a dynamic urban economy and responsive city through effective and networked governance
- Re-discover the city's relationship with the sea - Integrated Thermaikos Bay

The goals are broken down into 30 objectives and more than 100 actions, each with multiple benefits for the city resilience and for its population. Actions include policies and initiatives that connect goals and city values.

Sustainable tourism via sustainable mobility is taken into account and promoted in this Strategy through several actions proposed within the 30 Objectives. Table 3.8 depicts the actions directly linked with sustainable tourism boost.

Proposed actions for tourism boost in Thessaloniki

Goal	Objective	Action	Description
1. Shape a thriving and sustainable city with mobility and city systems that serve its people	B. Adopt Transit Oriented Development (TOD)	03. Prepare sustainable, area wide plans according to TOD Standards	Design of urban spaces around metro stations with new pedestrian zones in order the surrounding areas to become new city destinations for both visitors and residents
	D. Move to clean power for transport	01: Design of a Metropolitan bike lane network	Design of two additional cycle lanes; a bike trail for leisure and sports use along the Regional Channel, the City's most important flood prevention route located at the north-east part of the City; and a bike lane along the waterfront to connect the two ends of Thermaikos Bay, creating a cultural, environmental and tourist-friendly promenade.
		02: Expand the network of bike sharing	System expansion and deployment of more bike sharing stations along existing, planned and future cycle routes, especially around metro stations and touristic areas
3. Build a dynamic urban economy and responsive city through effective and network governance	C. New cross sector partnerships	04: Explore the potential of new zones of activity and employment around Thermaikos waterfront and port	Specified tourist zones will be explored and further supported
	D: Metropolitan collaboration	03: Develop a common policy approach for tourism at the metropolitan scale	Due to the fact that tourists tend not to leave the historical center, despite there being numerous historical and cultural sites and landmarks in close adjacent municipalities in the Metropolitan Area the creation of new opportunities in tourism is proposed through the development of an holistic tourism strategy for all the whole Metropolitan Area. This aims to attract more tourists for longer visits, creating new economic opportunities and enhancing the city's brand. Tourism offering will also be diversified, providing inclusive and accessible tourism, environmentally sustainable tourism and tourism aimed at young people
4. Rediscover the city's relationship with the sea-Integrated Thermaikos Bay	A: Integrate economic and urban development of the Bay	01: Develop a Land Use Investment Framework to capitalize on real estate along the coastal zone	Development of the area into a more economically vibrant and sustainable zone for local commerce, tourism and leisure activities.
		03: Develop off-shore Infrastructure	Thessaloniki is already popular with tourists and locals as a marine activity destination, due to its position in the Balkan Peninsula and easy access by sea and air. Sustainable investment in activities related to service oriented infrastructure (e.g. marinas, mooring docks seaplane terminal) will pave the way for the development of these infrastructure

Available at:

5.3.3 Local cooperation schemes and action plans on for sustainable tourism and mobility promotion

The main stakeholders in the city of Thessaloniki are:

- Thessaloniki International Fair. More on: (<https://www.thessalonikifair.gr/en>)
- Thessaloniki Port Authority S.A. More on: (<https://www.thpa.gr/index.php/en/>)
- Private tourist companies
- Tour guide offices
- Private companies organizing cultural tours in the city
- Transport Providers
- **OASTH (Thessaloniki Urban Transport Organization)** is the Public Transport Operator of Thessaloniki providing public transport services within the Metropolitan area of the city. More on: (<https://oasth.gr/>)
- **KTEL S.A.**, connects the city of Thessaloniki with the capital of Greece, Athens and other Greek cities while it also provides urban services within the city. Recently KTEL came into agreement with OASTH for running a number of OASTH's lines covering mainly interurban areas of the city. More on: <https://ktelthes.gr/el/>
- **Thessbike** is one of the largest private providers of shared and rental bicycles in Greece. It owns and manages the shared bicycle network of Thessaloniki Municipality. The network consists of eight stations and 200 bicycles. The fleet includes bicycles for kids, two seated and four seatwedd family bicycles, electrical bicycles and scooters. More on: <https://www.thessbike.gr/>
- **Thessaloniki Waterways** provides Sea Urban Transport services, connecting the city center with the east suburban areas of Thessaloniki. More on <https://thessaloniki.travel/en/useful-information/moving-around-the-city/%C2%ABthessaloniki-waterways%C2%BB-small-boats>

The main cooperation schemes in Thessaloniki are:

- **Thessaloniki Tourism Organization (T.T.O.)**

T.T.O. [41] is a non-profit organization which constitutes the official tourism board of Thessaloniki's Region. It aims at:

- Advertising and promoting the city of Thessaloniki as a tourism destination
- Designing the tourism brand of Thessaloniki
- Preparing and implementing tourist development strategic plans
- Promoting and highlighting the strategic advantages of Thessaloniki as an important touristic, commercial, economic, cultural, religious and cruise destination as well as a MICE destination
- Creating promotional and informative material and publications such as aps, city guides and targeted thematic brochures while designing, implementing and promoting new tourism products and services.
- Supporting and coordinating various events that promote the tourism profile of the Region

More on: <https://thessaloniki.travel/en/who-we-are/thessaloniki-tourism-organization>

- **Thessaloniki Hotel Association (THA)**

THA [42] is a non-profit professional association, the oldest in Greece, established in 1914. The Association studies and promotes the economic, social and professional interests of its members while also promotes

the city of Thessaloniki as a tourist destination through its collaboration with local and other authorities, who play a key role in the development of tourism in the area. It numbers 84 hotels-members, located mainly in the city of Thessaloniki, but also in other areas in the Thessaloniki Regional Authority, representing 65% of total amount. This capability has allowed THA to play an important and decisive role, for many years now, in the development of tourism in Thessaloniki and its wider area. Furthermore, THA is a founding member of the Hellenic Hotels Federation (HHF), of Thessaloniki Tourism Organization (TTO) and of Thessaloniki Convention and Visitors Bureau (TCVB).

More on: <http://www.tha.gr/>

- ***Thessaloniki Convention Bureau – TCB***

Thessaloniki Convention Bureau [43] is a non-profit organization set up by a group of public and private companies, with the participation and support of the Municipality of Thessaloniki. Its mission is to establish Thessaloniki as a world-class meeting and convention destination. It acts as an intermediary link between planners and the local service providers - conference centers, venues, hotels, etc.

More on: <https://www.thessalonikiconventionbureau.gr/>

- ***Tourists Guides Association of Thessaloniki and Northern Greece***

The Union of Guides, Thessaloniki (U.G.T.) [44] was founded in 1956. U.G.T.'s main purpose is the protection of the professional and the unionist interest of its members, as well as to keep the members informed about matters concerning the profession. Very often the Union organises lectures, seminars and educational trips to inform its members about the new facts of the historical and archaeological research. These trips are organised all around Greece but also abroad, especially in places connected with Greek history. The members of the Union offer, quite often, free guided-tours, for instance on the occasion for the celebration of the International Guide's Day or to special groups as invalids, offering social work. Sometimes these free guided-tours are organised in cooperation with various Museums, Ministries and Universities, etc.

More: <https://www.touristguides-ngreece.gr/en/>

5.4 Local policies, strategies and action plans for sustainable tourism and mobility promotion: Epirus Region pilot

Following the national and regional frameworks that were mentioned before, several policies can also be identified in relation to the local touristic, mobility and sustainable development in the different areas of the Epirus Region:

● **CLLD LEADER 2014 – 2020 Program**

The CLLD LEADER 2014 – 2020 Program is a local-based Program that methodically plans and implements local integrated development strategies, in order to effectively address the economic, social, environmental and demographic challenges. The local communities are a particularly powerful tool in this regard, as they:

- a. make steady progress towards more effective forms of economic, sustainable and "non-exclusive" development, in line with the "Europe 2020" strategy,
- b. become "innovate" in order to counter the socio-economic problems of the country's rural areas and
- c. strengthen social cohesion in rural areas.

In Epirus, the local CLLD LEADER 2014 – 2020 Program concerns the Regions of Ioannina and Thesprotia (excluding the Municipal Community Ioanniton) and aims to strategically achieve the following goals:

- Production of quality, certified, competitive products of the agri-food sector.
- Competitive craft units. (production of quality competitive products with export potential).
- High quality tourism and special forms of tourism.
- Protection and promotion of the natural and residential environment and intangible heritage.
- Improving the quality of life of rural residents by shaping appropriate and attractive living conditions and improving the quality of life of the population mainly in the most mountainous and remote municipalities and small fishing settlements in the intervention area.
- Strengthen the sustainability of fishing areas which will be achieved through public support projects in the fisheries and aquaculture sector and environmental protection, as well as private projects to strengthen the competitiveness of businesses and the income of fishermen.

● **Sustainable Urban Mobility Plan (SUMP)**

The Sustainable Urban Mobility Plan (SUMP / ΣΒΑΚ) is "a strategic plan designed to satisfy the mobility needs of people and businesses in cities and their surroundings for a better quality of life. It builds on existing planning practices and takes due consideration of integration, participation and evaluation principles". It is implemented in the Municipality of Igoumenitsa and the Municipality of Preveza, aiming to:

- Ensure all residents are offered transport options that enable access to key destinations and services;
- Improve safety and security;
- Reduce air and noise pollution, greenhouse gas emissions and energy consumption;
- Improve the efficiency and cost-effectiveness of the transportation of persons and goods;
- Contribute to enhancing the attractiveness and quality of the urban environment for the benefits of residents, the economy and society as a whole;
- Define mobility policies in the context of a clear vision;
- Identify measurable targets to address long-term challenges of urban mobility;
- Ensure the involvement of stakeholders at appropriate stages;
- Achieve collaboration between relevant policy areas and authorities.

- **Local Community Initiative Development (TAPTOK)**

The Local Community Initiative Development (TAPTOK) is a tool for planning and implementing local development strategies and addressing local economic, social and environmental needs with the participation of the community in clearly defined spatial units. This approach aims to reverse the traditional development policy from a "top-down approach", while and encouraging policies from a "bottom-up approach".

Through the Operational Program of Epirus 2014-2020, the implementation of three TAPTOK Strategies will be financed by the European Social Fund (ECB). The TAPTOK Strategy will be implemented in the Municipality of Ioannina, as well as the Municipality of Thesprotia, excluding the areas of implementation of the Sustainable Urban Development Strategy.

The main goal of TAPTOK, is to support local entrepreneurship focused on:

- The agri-food sector, which includes production and processing in the following sectors: dairy products, honey, wine, oil products, medicinal and aromatic plants.
- Implementation of innovation in the businesses of the secondary sector and the creative industry, such as businesses related to wood carving, silver smiting, barrel making, textile, carpet weaving, candle painting, hagiography, marble and stone processing, etc.
- "Experience Industry", which includes tourism and culture.

5.5 Local policies, strategies and action plans for sustainable tourism and mobility promotion: Ljubljana Region pilot

The pilot of Ljubljana urban region, SUSTAINABLE CIRCLE AROUND LJUBLJANA MARSH NATURE PARK will focus on improving the attractiveness of the bike&rail sustainable tourism offers from Ljubljana main train station through defining tourist's needs from Ljubljana main train station to Ljubljana Marsh Nature Park by bike.

Pilot's implementation area is Ljubljana Marsh, the largest Slovene and southernmost European wetlands. Almost 160 square kilometres large plain is administratively divided in 7 municipalities, namely Municipality of Borovnica, Brezovica, Ig, Škofljica, Vrhnika, Log-Dragomer and the capital, City of Ljubljana. Ljubljana Marsh Nature Park Public Institute was established in 2008 to protect this unique landscape.

An attractive site is less known to foreign tourists due to bad connectivity to Ljubljana. Due to its terrain, it is ideal for promoting cycling and other forms of sustainable tourism.

The pilot will offer an integrated tourist package, which will connect relevant governate stakeholders, providers of tourist services and public transport operators and will be based on following documents that were already mentioned in previous chapters:

- Strategy of Tourism Development and Marketing in the Region of Central Slovenia 2017-2022,
- Regional Development Programme of the Ljubljana Urban Region 2014-2020,
- Decree on the Ljubljansko barje (Ljubljana Marsh) Landscape Park,
- Sustainable urban mobility plan for Ljubljana urban region,
- Sustainable urban mobility plan for Ljubljana,
- Sustainable urban strategy for Ljubljana 2014-2020 and implementation plan.

5.6 Local policies, strategies and action plans for sustainable tourism and mobility promotion: Zadar Region pilot

At the local level, the City of Zadar is authorized to plan its development in all areas, including tourism and mobility. The core strategical development document is:

1. Strategija razvoja grada Zadra - Development strategy of the City of Zadar

Link: <https://www.grad-zadar.hr/repos/doc/Strategija%20razvoja%20grada%20Zadra.pdf>

There are also development documents that define the strategic development of tourism and mobility:

2. Strategija razvoja turizma Grada Zadra za razdoblje 2016.–2026. - Tourism development strategy of the City of Zadar for the period 2016-2026;
3. Projekt prometnog sustava grada Zadra: ITS (inteligentni transportni sustav) s revizijom i dopunom prometne studije grada Zadra - Zadar transport system project: ITS (intelligent transport system) with revision and supplement of the transport study of the city of Zadar.

Central role in promotion of tourism on local level have Zadar Tourist board. The Zadar Tourist Board is an organization that operates on the principle of destination management. Its basic task is to promote and develop tourism in the City of Zadar and the economic interests of legal and natural persons who provide hospitality, catering and other tourism services or perform other activities directly related to tourism by managing the destination at the level of the City of Zadar.

The Zadar Tourist board promote rent a bike in Zadar.

5.7 Local policies, strategies and action plans for sustainable tourism and mobility promotion: Tivat Region pilot

Local policies, strategies and actions related to sustainable tourism and mobility option in Tivat are presented in two key strategic documents: Strategical development plan of Tivat (2019-2022) and Strategy of Tourism Development of Tivat (2020-2024).

- ***Strategical development plan of Tivat (2019-2022)***

This Plan has following priority sectors: economic development, Planning and environmental protection, communal infrastructure development, sport and culture development, social policy, international project, energy efficiency, and employment. Tourism sector is recognized as very important in many aspects (e.g. new income, new jobs, investments etc.). On the other side, in area of technical infrastructure, a number of important projects are recognized. Moreover, among 47 planned priority projects, 16 are related to traffic infrastructure (e.g. MR1 road, MR2 road, promenade in Krašići, promenade in Belani, Tivat boulevard, Tivat bypass, a number of local roads etc.). Most of mentioned projects are focused on better opportunities for tourism development, providing efficient mobility options for tourists and citizens.

More details available at: <https://opstinativat.me/strategije-planovi-i-programi/>.

- ***Strategy of Tourism Development of Tivat (2020-2024)***

It provides an important insight into tourism sector in Tivat, especially in sense of strategic tourist products, markets, target groups, new investment opportunities etc. Tivat has share of 5% of total tourist arrivals and share of 7% of total overnights in Montenegro. Key tourist products in Tivat, according to strategy, are: mice, cultural, rural, luxury, nautical and sport tourism. Key obstacles in context of infrastructure are seen in airport capacity that requires further modernization, and road traffic jam that are common during summer. On the other side, vast potential is recognized in marin transport/traffic in Boka Bay. Also, strategy recognizes the need for better public transport capacities in areas outside of city centre, especially in sense of service quality (e.g. number of buses, capacity of buses, e-buses introduction etc.). additionally, important issue is the question of traffic impacts of environment as well as suggestion for “low carbon” mobility options in Tivat.

More details available at: <https://opstinativat.me/strategije-planovi-i-programi/>.

5.8 Local policies, strategies and action plans for sustainable tourism and mobility promotion: Berat Region pilot

Berat as a UNESCO world heritage site

Recognizing the uniqueness of Berat, as early as 1961 the town was declared a Museum City by the Government of Albania. On July 8, 2008 Berat was registered on the UNESCO World Heritage List by the Committee of World Heritage. Berat was valued as a rare example of typical Ottoman architecture. According to the evaluations, Berat is considered as an example of coexistence of various religious and cultural communities for many centuries.

Berat Tourism Strategy

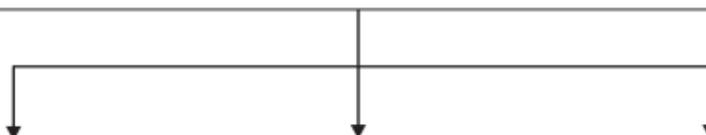
The *Berat Tourism Strategy and Action Plan (TSAP)* is a detailed outline of the Berat Municipality’s commitment to tourism development over the next ten years. The plan is a formally endorsed document produced by a Tourism Action Committee (TAC) comprising local government, private sector and civil society representatives. The plan articulates the vision of Berat to become a quality destination developed on the principles of sustainability. It identifies actions in four key strategic areas: product development and quality improvement, access and infrastructure, marketing and promotion, and human resources and destination management.

The plan is based on a participative process involving analyses of the area’s existing and potential tourism markets, assets and needs, the agreement of strategic goals and objectives and identification of a programme of activities to achieve them. The involvement of the Berat community in the development of the plan has led to local ownership. The output is a working document which is used to stimulate and guide action.

This strategy sets out our Vision and goals for the development of tourism in Berat over the next 10 years. The vision is founded on the principles of QUALITY and SUSTAINABILITY – quality and value based experiences for visitors; quality products and services representing the uniqueness of Berat; in harmony with the environment; and improving the quality of life for Berat citizens - these things, together, will ensure the sustainability of tourism in Berat.

Vision

Berat is a quality destination, well known internationally, with sustainable development of tourism, which preserves and revitalizes its cultural and natural resources, offers unique values and experiences, and contributes to improvement of the quality of life of citizens



Vision for Tourism Development in the Municipality of Berat

Based on the principles of sustainable tourism

Tourism development in Berat will be based on the principles of sustainability. Sustainable tourism can be expressed as: Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities.

Sustainable tourism development requires the informed participation of all relevant stakeholders, as well as strong political leadership to ensure wide participation and consensus building. Achieving sustainable tourism is a continuous process and it requires constant monitoring of impacts, introducing the necessary preventive and/or corrective measures whenever necessary. Sustainable tourism should also maintain a high level of tourist satisfaction and ensure a meaningful experience to the tourists, raising their awareness about sustainability issues and promoting sustainable tourism practices amongst them.

The way forward

The vision of the Berat Tourism Strategy and the Action Plan that supports it set out the role that the tourism sector will play in the sustainable development of Berat. The aim is to develop Berat as a quality destination, attracting high yield tourists with an interest in culture and nature.

In the short to medium term we will capitalize on our existing tangible and intangible cultural and heritage assets. Our focus will be on renovating or upgrading existing infrastructure; strengthening the capacity of our human resources; improving the quality of our accommodation, attractions, restaurants and souvenirs; better understanding our current and potential markets; and raising awareness of tourists and the tourism industry of Berat as a quality destination.

In the medium to long term we will focus on expanding the range of products and services available to tourists. We will pay attention to attracting new investment in tourism products and services that offer unique experiences while enabling development that is in harmony with the natural and social environments of Berat and contribute to improving the quality of life of our citizens. Our aim will be to combine our culture, heritage and nature in the tourist experiences. At all times our focus will remain on quality over quantity

Target markets

In developing tourism in Berat the focus will be on developing products and services that meet the needs of the target markets. Five key target markets are identified as follows

- **CULTURE ENTHUSIASTS:** travelers that are interested in new destinations with experiencing culture as the highlight of their travel. Culture's enthusiasts will be highly predisposed to Berat offer and want a particular, authentic experience.
- **CULTURE MODERATES and SOFT ADVENTURE SEEKERS:** travelers that are interested in including cultural activities as part of a broader travel experience. It also includes independent travelers who want to explore 'out of the ordinary' destinations. Soft adventure is a travel experience that goes beyond the typical tourist itinerary, and generally combines physical activity with cultural experiences.
- **INTERNATIONAL TOUR GROUPS/GRAND TOURISTS:** Berat is included in many itineraries of existing tours. There is an opportunity to expand this market with a particular focus on developing products and services in shoulder seasons. Attracting international tour groups can ensure some business stability while enabling engagement with new markets.
- **RETURNING TO MY ROOTS:** 'Returning to my roots' market refers to those tourists who travel to discover their ethnic and geographic heritage. Already Albanians living in the broader Balkan region and Berat Diaspora together make up the largest market to Berat. As it is expected that this market will continue to be an important source of future visitors it will be important to understand their needs and expectations and develop relevant products and services.
- **DOMESTIC MARKET:** The domestic market could be considered in the longer term for a range of reasons. First, a rising Albanian rising middle class originating from the main cities is interested in discovering the history, local cuisine and participating in nature and adventures activities. Second, festivals organised in Berat City are gaining a reputation throughout the country and are beginning to attract domestic tourists. Finally, the domestic market is likely to be more stable than the international market over time, based on experience elsewhere.

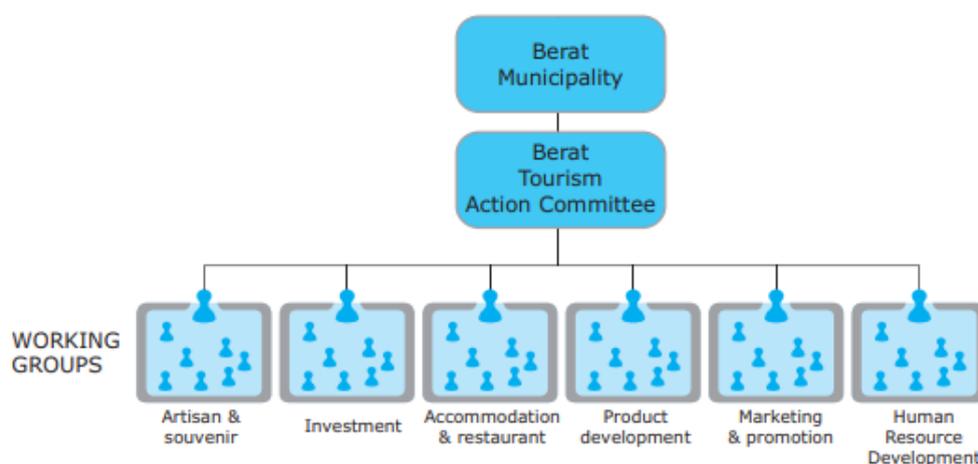
A framework for action and implementing the plan

To deliver the vision and goals outlined previously, four key areas of action containing 21 objectives are prepared. The areas are interdependent and equally important.

- Product development and quality improvement
- Infrastructure and access
- Marketing and promotion
- Human resources and management of the destination

Overall responsibility for implementing this Tourism Strategy and Action Plan rests with the Berat Municipality. Achieving the goals and objectives set out in this TSAP will require the support of many government agencies, international and national organisations, the tourism private sector, and most importantly, the citizens of Berat. The Tourism Action Committee will facilitate coordination and implementation of the TSAP on behalf of the Berat Municipality. The TAC will establish a number of working groups incorporating relevant experts, agencies and individuals to ensure the highest levels of achievement.

The proposed TAC Working Group structure is as follows



Proposed Tourism Action Committee Working Group

Tourism action plan

There is a need to improve the quality of existing tourism products and services and to diversify, over the medium to longer term, the product offer, in accordance with the aim to develop Berat as a high quality tourism destination that contributes to the well-being of citizens. Improving existing products and services focuses on upgrades in the Historic Centre and its surrounds (buffer zone) and building on and improving products based on the culture and traditions of Berat. The development of new products and services aims to increase the variety of products available to tourists thereby attracting a broader market and encouraging visitors to stay longer in the region.

The development of products and services is based on an understanding of the demands of tourists from target markets and the need to create conditions for a thriving and sustainable destination

Stakeholders: Ministry of Tourism and Environment, Regional Council of Berat, Berat Municipality, DRKK, World Bank, EU, UNESCO, Bilateral Donors, Directorate of Museums, Directorate of National Culture, Directorate of Education, Non-Government Organizations, Regional Tourism Office, Private Sector Businesses, Art Gallery, School of Arts, Artisans, Emigrants, Citizens.

Nr.	Aim	Objective	Actions
1	Quality products and services offered year-round	Develop nature-based attractions and activities	Prepare a plan for the sensitive development of demand driven tourist attractions and soft adventure activities in the mountains surrounding Berat: <ul style="list-style-type: none"> - Accommodation (eg. Eco-resorts, camping, hunting lodges, farm stays, rural retreats) - Historic routes (eg. Berat to Korce) - Soft adventure activities (eg. Rafting, Canyoning, Hiking and biking)
2			Promote new business opportunities identified to potential local and national investors at relevant investment conferences
3		Develop local tours	Encourage the establishment of local tour operators and the development of local tours
4			Facilitate exchange experiences of local tour operators with national and foreign tour operators
5			Support the development of quality, demand driven tour packages and promote to: <ul style="list-style-type: none"> - tour operators with potential to operate to Berat - direct to tourists in Berat

6			promote local tour operators in Berat promotional materials
7			Prepare maps and facilitate logistics for visiting tour operators
8		Revitalize the traditional artisan skills of Berat	Establish an Artisan and Souvenir Working Group to revitalize artisanal skills and facilitate the development of souvenirs
9			Identify traditional artisanal skills which can be revitalized and identify artisans
10			Provide technical support to the Artisans Association on, for example: <ul style="list-style-type: none"> - Functioning of the association - Product development - Joint marketing - Business practices
11			Facilitate artisan participation in local and regional fairs to showcase and sell Berat artisanal products
12			Establish an Investment Working Group to raise local government awareness of the need for incentives to attract investment from Berat Diaspora
13		Facilitate investment from the Berat Diaspora	Develop and approve fiscal incentives for sensitive tourism investment by Berat Diaspora in the Historic Centre Berat Municipality
14			Prepare project proposals for identified investment opportunities Berat Municipality
15			Promote identified investment opportunities and fiscal incentives using targeted campaigns to reach Berat Diaspora
16		Improve restaurant capacity to cater for international tourists	Establish an Accommodation and Restaurant Working Group to encourage hotels and tourist restaurants to better cater to national and international tourists
17			Facilitate the translation of tourist restaurant menus into target market languages (Italian, English)

18	Protect and improve tourist attractions	Protect and improve cultural attractions in the Historic Centre	Restore the icons held by the Directorate of National Culture, Berat
19			Review regulations for interventions in the Historic
20			Conduct a PR campaign to raise community awareness of the new regulations for interventions in the Historic Centre Berat Municipality;
21			Upgrade interpretation in churches located in the Historic Centre and facilitate tourist access (e.g. increase opening hours to seven days per week)
22			Identify abandoned houses in the Historic Centre and prepare a plan for their revitalization
23			Encourage development of sensitive, quality accommodation in the Historic Centre based on forecast demand
24			Conduct educational activities in natural areas to raise environmental awareness of Berat citizens
25		Revitalize Berat traditions and customs and incorporate into tourism offer	Conduct a series of round tables with senior citizens who are experienced in various fields (arts, gastronomy, folk stories, handicrafts, music, architecture, etc.) to document Berat traditions
26			Facilitate discussions on Berat traditions in the media (printed and televised) with mixed generations
27			Revitalize traditional folk games through the conduct of activities during key events including: <ul style="list-style-type: none"> - Berat festival - Carnivals - Summer day

			- Mountain day
28	Quality products and services offered year around round	Identify and develop demand driven souvenirs	Identify producers of contemporary and traditional souvenirs (or potential producers)
29			Assist souvenir producers to identify sales outlets for their products including creation of links with hotels and restaurants
30			Conduct an annual "best Berat souvenir" competition as part of Berat Festival to support the development of quality, demand driven souvenirs
31			Annual Support the development of applications for projects supporting souvenir development
32		Promote Berat traditional cuisine	Meet with accommodation and restaurant representatives to raise awareness of activity to promote traditional cuisine
33			Facilitate the conduct of training courses on the preparation, serving and presentation of traditional cuisine
34			Conduct an annual regional 'Top Restaurant' competition as part of Berat Festival
35			Develop promotional materials in cooperation with restaurants serving Berat traditional cuisine
36		Develop tourism villages and farms	Establish a Product Development Working Group
37			Conduct a series of meeting with village administrative units and citizens to raise awareness and interest in village tourism development
38			Prepare project proposals, in cooperation with interested parties, for the development of village and farm tourism in rural locations in Berat region
39		Develop caravan and camping tourism	Designate an appropriate location for the establishment of a caravan and camping ground
40			Install facilities required for caravans and camping (electricity, waste management etc.)
41			Conduct fair process to outsource operation of caravan park to private sector
42		Develop sporting activities such as cycling, rafting and paragliding	Designate appropriate bike trails for encouraging tourists to make usage of bikes
43			Organize trip to Tomorri canyons for rafting
44			Develop extreme sports such as paragliding

The Berat Tourism Strategy and Action Plan (TSAP) has been developed from a participative process involving analyses of the Berat's existing and potential tourism markets, assets and needs, the agreement of strategic goals and objectives and identification of a programme of activities to achieve them.

The Berat TSAP provides a framework for businesses, governments and relevant organizations to analyze tourism markets, tourism assets and tourism concerns in order to develop objectives that enhance assets and overcome concerns. The Berat TSAP is intended to be a flexible, evolving, "working" plan to allow for fast-changing needs and demands of the tourism sector.

5.9 Local policies, strategies and action plans for sustainable tourism and mobility promotion: Belgrade Region pilot

As Belgrade represents both a city and a region in the State of Serbia, the requested information are already reported in chapter 4.9.

6. Initial orientation on the SUSTOURISMO pilot cases development

6.1 Initial orientation on the SUSTOURISMO pilot case development: Emilia-Romagna Region pilot

The Emilia-Romagna pilot is related to the integration in the existing regional sustainable mobility App called Roger of some innovations related to sustainable tourism promotion. The Emilia-Romagna pilot intends to develop and test innovative tools for the promotion of the nexus among sustainable tourism and sustainable mobility. The Emilia-Romagna pilot main objectives can be summarized as:

- Integration of a “regional tourism section” in the regional Maas App called “Roger”;
- Definition of a dedicated touristic packages for tourists in the Romagna area;
- Improvement of information flows on sustainable mobility options for sustainable tourism in the Emilia-Romagna region;
- Coordination with the key regional touristic and sustainable mobility stakeholders.

The pilot will be developed in the Romagna area. The Romagna area is one of the most important touristic Italian area. In 2018, in the Emilia-Romagna Region, 40.647.799 tourist were registered. More than the 80% of these tourists are registered in the Romagna area. In particular in Rimini (16.181.180), Ravenna (6.678.863), Forlì-Cesena (5.492.178) and Bologna (4.729.192), where Bologna is the only city that does not belong to Romagna. These very consistent touristic flows generate every year several problems related to traffic jam, both in the highway and on the local roads.

<i>Questions</i>	<i>Orientation for pilot development</i>
Which are the main opportunities for tourism and mobility growth in your pilot area?	<p>The main opportunities for tourism and mobility growth in the Romagna costal area are:</p> <ul style="list-style-type: none"> - In the last years (pre covid-19 emergency) the number of tourists regularly grown; - Long tradition in the promotion of sustainable mobility both for tourists and commuter (several investments in the last years for rail service improvement, etc.); - Consistent investments for the promotion of more attractive and efficient public transport services (in particular the “Metromare” service, a surface high speed bus service connecting Rimini with Riccione); - In the last two years, the main Romagna coastal area municipalities launched new sharing mobility services (the first was Rimini that in 2019 launched a free-floating e-scooters sharing service and Ravenna launching in 2020 an e-scootrs sharing service and an electric bike sharing service). - Growing role and numbers of the sustainable tourism in the Romagna area (and at regional level in general) mainly related to thematic tourism (food, etc.), trekking and biking; - Rich cultural and natural assets, with a lot of variety (from seaside tourism to mountain trekking); - Improvement of the bike lines network (big investments activated in the last years).

<p>Which are the main gaps for tourism and mobility growth in your pilot area?</p>	<p>The main gaps for tourism and mobility growth in the Romagna costal area are:</p> <ul style="list-style-type: none"> - Public transport offer often not adequately known by tourists - Lack of public transport solution connecting the mail costal areas with the countryside villages; - Difficulties in promoting integrating ticketing systems, users friendly and convenient; - Covid-19 emergency impact on tourism. In particular due to Covid-19 restrictions a large part of foreigners tourists not reached the pilot area during the Summer 2020; - The Covid-19 emergency situation reduce the availability in promoting innovative touristic and mobility services; - Car is the principal way of transport in the Romagna area.
<p>Which are the main touristic and mobility challenges tackled by your pilot?</p>	<p>The main challenges for tourism and mobility growth in the Romagna costal area are:</p> <ul style="list-style-type: none"> - Improvement in the integration of different public transport services (in particular local buses and national/regional trains); - Improvement in the integration of public transports with micro mobility solutions for the last-mile/urban travels; - Improvement of public transport ticketing services for tourists in terms of convenience and easy to use solutions; - Creation of synergies among tourism regional and local departments and transport regional and local departments; - Better promotion of touristic solutions, with a specific focus on the sustainable ones; - Improvement of information flows on sustainable mobility options for sustainable tourism in the Emilia-Romagna region.
<p>Which are the main touristic and mobility gaps tackled by your pilot?</p>	<p>The main gaps tackled by ITL pilot for tourism and mobility growth in the Romagna costal area are:</p> <ul style="list-style-type: none"> - Lack of coordination among touristic and mobility regional and local departments; - Weaknesses on the promotion among tourists of sustainable public transport solutions; - Lack of touristic offers integrated with sustainable transport solutions; - Scarce integration among touristic and public transport information and data.
<p>How your pilot contributes to the overcoming of these touristic and mobility gaps?</p>	<p>The ITL pilot contribute to overcoming existing gaps in different way. In particular:</p> <ul style="list-style-type: none"> - Addition of a touristic section in a typical sustainable mobility app; - Creation of dedicated and thematic sustainable touristic packages;

	<ul style="list-style-type: none"> - Better nexus among touristic and public transport real time information; - Definition of better cooperation platform and solutions for key tourism and transport regional and local stakeholders.
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6.2 Initial orientation on the SUSTOURISMO pilot case development: Friuli-Venezia-Giulia Region pilot

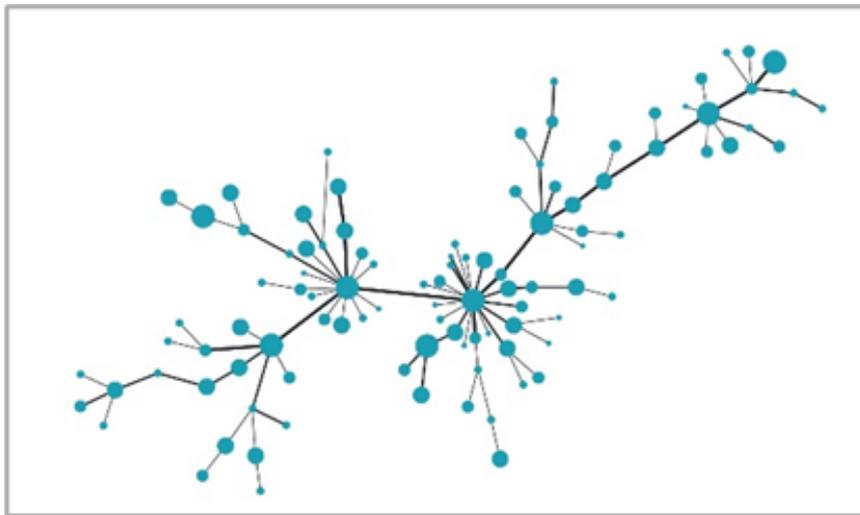
In Friuli Venezia Giulia the main *assets* and strengths are represented by:

- **geostrategic position**, because the Region is located between Italy, Europe and the Mediterranean, which allows cross over flows of people, consumers, travellers, tourists and goods along an east-west and north-south route;
- **wealth of heritage and plural identities**, because there is a vastness of culture-rich localities where the Italian, Friulian, German and Slovenian cultures coexist, allowing for the promotion of rewarding tourist and experiential experiences
- **transversal management of "turismi" (different types of tourisms)**, since different bodies and structures contribute to the provision of services and opportunities to travellers and tourists, also through vertical and horizontal governance actions;
- **tourist offer as a result of the value chain**, since there is generally a cooperation between PromoTurismoFvg, the subjects involved in the provision of services (tourist consortia, private companies) and territorial key players (Municipalities, Gal, Pro loco, Associations);
- **transport networks and services**, since the Region is crossed by two European road and rail Corridors (Corridor 1/Baltic Adriatic and Corridor 3/Mediterranean, which allow connections between Italy and Central and Eastern Europe, and vice versa, and between the Mediterranean and Europe), by maritime routes (from the Adriatic and the Mediterranean through the Suez Canal it is possible to be reached by tourists and goods from the Middle and Far East); it is innervated by cycle routes, networks and cycle paths that connect landscapes and places; it is equipped with companies that provide transport services (road, rail, sea) and promote inter-modality.

The trends of "tourism" in Friuli Venezia Giulia can be summarised as follows:

- **2.5 million tourists arriving**: attracted to a significant extent by the seaside resorts of Grado and Lignano Sabbiadoro, of which 50% are foreigners (they arrive first of all from Austria);
- **108 thousand of the arrivals are oriented in Carnia**: it is an important part of the regional mountains, of which 31,000 are foreigners;
- **656 agro-tourism companies**: there is an increase in this type of accommodation in support of new forms of sustainable tourism, which mainly provide "catering" and "accommodation" services;
- **Trieste is the destination of considerable tourist flows**: attracted by the city's central European and multicultural profile, also under the thrust of cruise tourism;
- **tourist tendencies to favour the enjoyment of heritage are consolidated**: natural, historical and artistic beauties represent the dimension of territorial "authenticity";
- **there is a consolidation of cycling flows over medium and long distances**: these flows come both from Central Europe (which represents the majority of travellers) and Eastern Europe; there are places, such

as the Zoncolan, which attract cycling travellers from the United States and South America as well as from Europe.



The relationships between mobility flows and places of origin / destination

Some smaller areas and localities have been involved in the development of regional programs in the fields of environment, agriculture, mobility and tourism. This has improved accessibility to contexts and economic performance, has increased the attractiveness of tourists, travellers and enthusiasts.

The benefits for the territories and businesses have been obtained through the integration of the following types of projects:

- the enhancement of the landscape and the environmental, historical and artistic heritage and local resources of the agri-food sector,
- the connection between cities and coastal and maritime areas, and between cities and mountain and inland areas;
- transnational, cross-border cooperation with Interreg programs and the interregional cooperation in the field of passenger mobility, rail and intermodal transport, cycling tourism (cycling, e-bike, MTB), and experiential paths and trails;
- the implementation of the national programme called "Aree Interne" (Inner Areas) in mountain areas with social and economic fragility.

Some cities and territories are also improving their profile in relation to their ability to attract new flows of tourists and cyclists.

The spread of authentic forms of travel and new trends in the "turismi" (different types of tourisms) market, which is increasingly shifting from producers to consumers (so in the pre and post Covid-19 phase), are redesigning the traditional hierarchies of places and affirming new centralities.

Complex territorial systems emerge in the Region with

- active participants who cooperate with each other to prepare projects and events,
- companies and supply chains able to understand and anticipate market changes,
- skills in attracting tourist flows and consolidating the transport and tourism link,
- accessibility to cities, places, heritage, landscapes, local productions,

- flexibility accommodating tourists who increasingly choose "authentic" destinations, want "narratives" and physical and inner well-being.

Friuli Venezia Giulia is crossed over by two fundamental elements that make up the system of European Ten-T networks called Corridor 1/Baltic Adriatic, which runs along a north-south route (which at the local scale involves Tarvisio - Adriatic Sea - Trieste) and Corridor 3/Mediterranean (which at the local scale involves Trieste - Monfalcone - Palmanova - Latisana). It is situated at an intersection between the north of the country (Venice, Padua, Bologna), the Mediterranean and Central and Eastern Europe; a large part of the territory is located on the border of Austria, with which it shares the mountainous ranges, and with Slovenia, with which it shares the river Isonzo and the Julian Prealps Park, and three original environmental landscape contexts: the "Collio", the "Carso" and the "Lagoon of Marano Lagunare and Grado". It is bordered in the east by the Isonzo river, in the west by the Tagliamento river, in the north by the mountains and in the south by the sea.



a) System of relations between European territories; b) European cycle network system (Eurovelo);
c) System of networks, hubs and interconnections in Friuli Venezia Giulia

These particular characteristics make the Region a place where significant flows of travellers, tourists and goods, on a national, European and international scale interconnect, both passing through and as a final destination.

The articulation and structure of the flows prefigure two complex territorial areas within which relevant economic and tourist activity are carried out, supported by transport networks and services.

- **from Tarvisio to Trieste, passing through Venzone, Udine, Cividale del Friuli, the Collio, Palmanova, Aquileia and the sea**

Predominant model

o territorial:

- is an area between Austria and Tarvisio in the north, Slovenia and Collio in the east, and Trieste, Grado and the Adriatic Sea in the south;
- it contains 4 fundamental landscapes (mountains, foothills, hills and sea) that make the area attractive, characterised by Tarvisio and its ski slopes, the medieval town of Venzone and Gemona del Friuli, entirely rebuilt after the 1976 earthquake, from Udine, the capital of Friuli, from the wine-growing and wine-producing area of Collio and the theatres of the Great War, from the Central European city and port of Trieste, from the historical and Unesco cities of Cividale del Friuli (capital together with Milan of the Lombard Empire), Aquileia (of Roman origin) and Palmanova (of Venetian origin);

- there are important natural heritages such as the forest of Tarvisio, the Julian Prealps Park, the agronomic compendium of the lowlands, the Karst, the mouths of the Isonzo and the island of Cona, and the lagoon of Grado and Marano;
- the differentiated landscapes are connected by a varied and rich historical, artistic and architectural heritage.

o of institutional and economic cooperation

- in some parts of the territory, the inter-municipal associations are active in the management of public services and territorial planning of large areas, and the Local Action Groups, in economic and tourist animation and the strengthening of the cultural offer.

o of organisation of the tourism model

- are involved, sometimes totally and sometimes partially, the tourist areas identified by PromoTurismoFvg as "Tarvisiano", "Gemonese", "Udine and surroundings", "Cividale del Friuli, Valli del Natisone e del Torre", "Gorizia, Collio e Monfalcone", "Grado, Aquileia e Palmanova" and "Trieste e Carso",
- The Tourist Consortia for the management, promotion and marketing of the tourist product, the Information and Reception Offices for tourist support, and the Municipal Information Points intervene;
- the Pro Loco are active for the linguistic, cultural and agro-touristic promotion of the territory;
- the most important tourist flows are fed by the ski resorts (Tarvisio) and seaside resorts (Grado), by historical and artistic cities (Venzone, Gemona del Friuli, Udine, Cividale del Friuli, Palmanova, Aquileia, Gorizia, Cormons, Trieste), by the authenticity of the places (Prealpi Giulie, Collio, Carso, Isonzo, Laguna di Grado), by the itineraries and by the walking routes on the symbolic places of the Great War.

o of transport links – tourism

- the Alpe Adria - Radweg cycle route (Eurovelo n. 7) passes through the territory, in which there is a dense network of cycle paths and itineraries connecting the cities and the various parts of the territory.
- The companies for the public transport of people by road, rail and sea operate, and inter-modality is active in the main train and courier stations and through the provision of "train + bike" services (provided along the route between Austria and Trieste and within the area), "bus + bike" (on the Udine - Palmanova - Aquileia - Grado ridge; between Grado and lower Isonzo), "bus + ferry + bike" (between Trieste and Monfalcone);
- there is the regional airport in Ronchi dei Legionari, well connected to the motorway and railway network;
- religious, spiritual and authentic routes and paths innervate the route, such as the "Via delle Abbazie" (the Way of the Abbeys) path and by the route of the "44 votive churches" (44 votive churches), the "Camino di Sant'Antonio" (Saint Anthony's Way), "Cammino Celeste" (Celestial Path), the "Romea Strata - Aquileia", "Romea Strata - Allemagna" and the routes "frescoes in the country churches" (frescoes in the

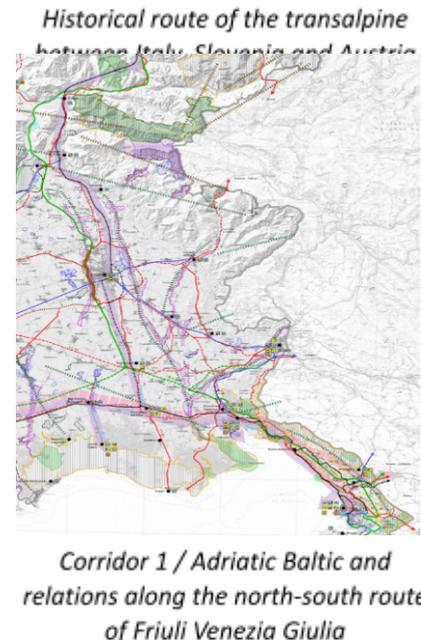


country church)" and by the historical and experiential route called "via Flavia";

- the historical mode of mobility within this European intersection is by the railway called "Transalpina", inaugurated during the Austro-Hungarian Empire on 19 July 1906, which connected the Adriatic, Trieste and Gorizia (today Italy), Nova Gorica, Jesenice, Bled (today Slovenia) to Villach and Vienna (today Austria) and made it possible to reach the cities of Central Europe; it is currently possible to ride the historical train on the Gorizia - Bled route.

o of ICT and App solutions

- The Region, PromoTurismoFVG, road and rail passenger transport companies promote digital transportation innovation using smartphones and social communication and information tools; communication is favoured for unitary mobility promotion services and accessibility to places and assets, the telematic booking of tickets, the locating of places, routes and timetables also through QR-Code. Investments are underway in telematic technology and services by transport service managers in order to further strengthen user interfaces and the ways in which information is transferred to travellers via mobile devices. The Region proposes to take action to improve stations and stops, also by setting up electronic pallets, as well as strengthening information channels to promote inter-modality.



- **from Trieste to Lignano Sabbiadoro, passing through Monfalcone, the lower Isonzo, the airport, Grado, Aquileia, Palmanova, Latisana and the river Tagliamento**

Predominant model

o territorial

- is a plain area between Slovenia and Trieste, to the east, and Latisana and the Tagliamento river, to the west, characterised by intense tourist flows led by Trieste, Grado and Lignano Sabbiadoro;
- present are the historical and Unesco heritage cities of Aquileia (of Roman origin) and Palmanova (of Venetian origin);
- there are important natural heritage sites, such as the Karst, the mouths of the Isonzo and the island of Cona, the precious lagoon of Grado and Marano, embraced by the rivers Isonzo and Tagliamento, and subject to protection by the International Convention on Wetlands of "Ramsar" (Iran, 2 February 1971) and the lowland forests;
- along the route is Monfalcone, the city of shipyards for the construction of large cruise ships;
- the urban, rural and marine landscapes are characterised by a varied and rich historical, artistic and architectural heritage.

o of institutional and economic cooperation

- in some parts of the territory, the inter-municipal associations are active in the management of public services and territorial planning of large areas, and the Local Action Groups, for economic and tourist animation as well as the enhancing cultural offers.

o of organisation of the tourism model

- the tourist areas identified by PromoTurismoFvg as "Trieste and Carso", "Cividale del Friuli, Valli del Natisone e del Torre", "Gorizia, Collio and Monfalcone", "Grado, Aquileia and Palmanova", "Lignano Sabbiadoro", " are involved, sometimes totally and sometimes partially.
- The Tourist Consortia for the management, promotion and marketing of the tourist product, the Information and Reception Offices for the support of tourists, and the Municipal Information Points intervene;
- the Pro Loco are active for the linguistic, cultural and agro-touristic promotion of the territory;
- the most important tourist flows are fed by the seaside resorts (Grado, Lignano Sabbiadoro), the historical and artistic cities (Trieste, Grado, Palmanova, Aquileia, Trieste), the authenticity of the places (Carso, Isonzo, Laguna di Marano and Grado, Tagliamento), the itineraries and by the walking routes on the symbolic places of the Great War;

o of transport links – tourism

- Adria Bike - Adriatica cycle route (Eurovelo n. 8) on which a dense network of cycle paths and itineraries connecting the cities and the various parts of the territory is hinged;
- the companies for the transport of people by road, rail and sea operate, and inter-modality is active in the main train and courier stations and through the provision of "train + bike" services (provided between Trieste - Trieste Airport - Cervignano del Friuli - Palmanova), "bus + bike" (on the route Lignano Sabbiadoro - Udine and Grado - low Isonzo), "bus + sea transport" (between Trieste and Monfalcone), the "ferry + bike" (between Marano Lagunare and Lignano Sabbiadoro and between Lignano Riviera and Bibione);
- there is the regional airport in Ronchi dei Legionari, well connected to the motorway and railway network;
- religious, spiritual and authentic routes and paths innervate the route, such as the historical and experiential route called "via Flavia", the "Via delle Abbazie" (the Way of the Abbeys) path and by the route of the "44 votive churches" (44 votive churches), "Cammino Celeste" (Celestial Path), the "Romea Strata - Aquileiense" and the routes "frescoes in the country church".

o of ICT and App solutions

- The Region, PromoTurismoFVG, the road and rail passenger transport companies promote digital innovation in transport through the use of smartphones and social communication and information tools; communication is favoured by the unitary promotion of mobility services and accessibility to places and assets, the telematic booking of tickets, the location of places, routes and timetables also through QR-Code. Investments are underway in telematics technology and services by transport service managers in order to further strengthen the user interfaces and the ways in which information is transferred to travellers via mobile devices. The Region proposes to take action to improve stations and stops, also by setting up electronic pallets, and to strengthen information channels to promote inter-modality.



Corridor 3 / Mediterranean and relations along the east-west route of Friuli-Venezia Giulia

6.3 Initial orientation on the SUSTOURISMO pilot case development: Thessaloniki Region pilot

<i>Questions</i>	<i>Orientation for pilot development</i>
<p>Which are the main opportunities for tourism and mobility growth in your pilot area?</p>	<p>The new terminal and the extension of the existing terminal in ‘Macedonia’ airport of Thessaloniki, as well as all other actions that will be implemented within the next year, is a good opportunity for the increase of tourism flows in the city. In turn, this will pose the foundation for the upgrade of the existing Public Transportation System in order a good connectivity to be developed between the airport and the final tourists’ destination.</p> <p>The completion of Thessaloniki’s Metro, estimated to operate in 2023, is an opportunity for both the transport and tourism sectors as it will upgrade the city’s public transport services and will also achieve an adequate modal shift from private vehicle to more sustainable trips within the city.</p> <p>The fact that most of all the national strategies presented above, aim to establish Thessaloniki as an attractive city destination, gives the opportunity for developing interventions that will enrich the provided touristic product and promote special tourism forms in the city such as cruise tourism, conference tourism, city break tourism.</p> <p>The promotion of low carbon emissions strategies especially for urban areas, proposed as a selected investment priority in the Regional Operational Programme of Central Makedonia, is a good opportunity for the city of Thessaloniki to enhance and promote the use of alternative environmentally friendly transport systems that will contribute to the city’s decongestion (enhancement of maritime transport in Thermaikos, extension of the bicycle network, increase of bike sharing stations and bicycles, etc).</p> <p>The Resilient Thessaloniki Strategy 2030, gives the opportunity for shaping a thriving and sustainable city by designing urban spaces as new city destinations for residents and tourists, the design of cycle lanes that will create tourist friendly promenades and the creation of new tourist zones around Thermaikos waterfront and port.</p> <p>The Sustainable Urban Mobility Plan of Thessaloniki, is also a good opportunity as the measures and interventions proposed will upgrade the city’s environment providing more public space for both residents and tourists, while it will also boost the use of alternative transport modes through the creatin of tourist routes and the extension of pedestrian and bicycle networks.</p>
<p>Which are the main gaps for tourism and mobility growth in your pilot area?</p>	<ul style="list-style-type: none"> - Lack of adequate public transport services provision, - Lack of adequate connectivity between the airport and the city center with public transport system,

	<ul style="list-style-type: none"> - Lack of adequate connectivity between the historic center of the city and the east suburban areas (where many beautiful beaches are located) with public transport services, - Lack of appropriate infrastructure for cruise tourism, - Lack of relevant agreements for enhancing the cruise tourism, - Lack of organized information kiosks for visitors in centric points of the city, the port and the airport.
<p>Which are the main touristic and mobility challenges tackled by your pilot?</p>	<ul style="list-style-type: none"> - Modal shift to alternative transport modes. Tourists mainly from the Balkan region reach the city by private vehicle, continuing using it for all the trips inside and outside the city. The main challenge is the provision of solutions for alternative trips within the urban and suburban area of the city, - Provision to tourists from other countries of alternative solutions for their trips within the city (walking, use of the existing bike sharing system), - Engagement of tourists and participation in the pilot testing, - Creation of cooperation schemes for the design and implementation of the pilot, - Lack of organized information provision regarding the transport options for trips within the city and outside the city.
<p>How your pilot contributes to the overcoming of these touristic and mobility gaps?</p>	<ul style="list-style-type: none"> - Tourists exploring the city will be provided with information regarding alternative transport options connecting the city center through the app and through the touristic package that will be created for this purpose, - Tourists will have the opportunity to pre-organize trips within the city, - Tourists will be able to find the most alternative mobility solution for visiting beautiful beaches located at the east part of the city, as they will get informed using the app.

6.4 Initial orientation on the SUSTOURISMO pilot case development: Epirus Region pilot

PED Epirus aims to implement two types of pilot actions:

- **Pilot Action A:** expanding the coast-line mass tourism with sustainable touristic activities and with diffusion towards the mainland based on sustainable mobility.
- **Pilot Action B:** developing short-term sustainable tourist activities for travellers, heading to or arriving to the Port of Igoumenitsa.

The above pilots will be located in the coastline of Epirus, as well as areas near the coast, specifically Igoumenitsa and Preveza. Starting from the port of Igoumenitsa, the goal is to mobilise tourists and integrate alternative touristic activities towards the mainland.

Thus, PED Epirus is planning to implement a unique touristic package that focuses on three main topics:

1. “Physical” touristic mobility:

- Walking trails and tours.
- Cycling trails.
- River trekking (combining walking with river-crossing).

2. “Mass” touristic mobility:

- Encourage touristic mobility from the coast towards the mainland.
- Develop local bus touristic lines.

3. Mobility with a focus on culture and nature:

- Combination of the above activities with sightseeing, cultural routes, natural protected areas, etc.

<i>Questions</i>	<i>Orientation for pilot development</i>
Which are the main opportunities for tourism and mobility growth in your pilot area?	<ul style="list-style-type: none"> • <i>The rising trend of the “modern” tourist</i> In the last years, a trend has been observed in Greece, and Epirus in particular, where even visitors who come for 'sun and sea', also aim for other touristic experiences. In that sense, tourism has shifted from the concept of “leisure” to the concept of “experience”. As a result of the alternative tourism trend, the local industry is more likely to offer a mix of touristic products, as a way to defeat seasonality and foster consumption. In such an environment, the concept of a touristic package focusing on alternative mobility, may be accepted by the majority of local businesses and visitors. • <i>Rich cultural and natural assets</i> Epirus offers a particularly rich cultural and natural heritage, including monasteries, museums, customs and traditions, that can be combined with mobility for touristic activities. The areas of Igoumenitsa and Preveza, showcase a rich natural environment with great variety of ecosystems and biodiversity, which has been explored by locals and tourists through alternative mobile activities, such as hiking, river trekking, cycling, cultural walking tours, etc. Therefore, the cultural and

	<p>natural heritage of the areas may support the further development of the touristic mobility package.</p> <ul style="list-style-type: none"> ● Variety of stakeholders <p>Epirus has many bodies, institutions and organizations that are likely to contribute to touristic growth and mobility development. Such stakeholders are:</p> <ul style="list-style-type: none"> - Local Authorities, Municipalities and the Region, for the development of activities and related projects - Organization of the Port of Igoumenitsa, for the development of the bus line - Cultural/Natural Associations (e.g. “Diazoma“ for the development of cultural routes) - Hotels and Associations of Hotel Owners - Tourist Information Centres and Enterprises - Cycling and Sport Enterprises and Associations - Volunteer Networks with a focus on hiking/cycling/river trekking, etc. <ul style="list-style-type: none"> ● Experience and Infrastructure <p>The Pilot Areas have participated in various European Projects, strengthening their experience and infrastructure which could support the development of the touristic mobility. Indicatively, the following can be mentioned:</p> <ul style="list-style-type: none"> - Integrated Development and principles of Sustainable Mobility are apparent in the area, particularly based on the Sustainable Mobility Plan of Igoumenitsa , which has been designed to present current challenges and future aspirations for a sustainable mobility network (https://www.svak.gr/). - The pilot operation of a bus line from the Port to the City Centre of Igoumenitsa is operated by the Municipality of Igoumenitsa, implemented in the framework of the Project Inter-Connect “Intermodality Promotion and Rail Renaissance in Adriatic - Ionian RegionA” (https://interconnect.adrioninterreg.eu/). - There is a bicycle rental system first developed by the Regional Unit of Thesprotia in the context of the pilot actions of the Project ADRIMOB “Sustainable coast MOBility in the ADRIatic area” (http://www.thesprotia.gr/uploads/file/ADRIMOB_brochure_2.pdf), and expanded (3rd station, greater number of bicycles) under the SUMPORT Program (https://sumport.interreg-med.eu/sustainable-mobility-plans/sump-harmonisation-in-thesprotia/). - The EV8 Eurovelo Mediterranean Route (5.388 km) ends via Igoumenitsa in Athens (https://www.bikemap.net/en/r/4689631/#7.72/39.005/21.251).
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	<ul style="list-style-type: none"> - There are walking and cultural routes developed in the areas, such as Epirus Trail (http://www.epirustrail.gr/en/), Cultural Route of Epirus by Diazoma (http://www.diazoma.gr/en/cultural-routes/iperiou-route-en/), etc. - There are ecotourism routes and activities by the two Management Bodies of Natura 2000 Areas of the region, i.e. for Kalamas - Acherontas - Corfu and for Amvrakikos Gulf (https://kalamas-acherontas.gr/odigos-episkepti/protinomenes-diadromes/, https://www.amvrakikos.eu/).
<p>Which are the main gaps for tourism and mobility growth in your pilot area?</p>	<ul style="list-style-type: none"> ● Limited Funds and Quality: <ul style="list-style-type: none"> - Lack of infrastructure, interconnection and often quality of the touristic products in the region. - Not a strong enough economic and legislative framework that can support tourism, sustainable initiatives and mobility development in particular. ● Limited Training: <ul style="list-style-type: none"> - Lack of skilled personnel that is able to address the current needs of an alternative touristic audience, focusing on mobility development. ● Lack of Innovation: <ul style="list-style-type: none"> - It is observed, that many of the current touristic activities and trend are not up-to-date and lack innovative elements that could contribute to an overall development. ● Lack of Information: <ul style="list-style-type: none"> - There is not a sufficient promotional network through which, information can be distributed to attract broader audiences.
<p>Which are the main touristic and mobility challenges tackled by your pilot?</p>	<ul style="list-style-type: none"> ● Concentration of touristic activities: <ul style="list-style-type: none"> - Concentration of touristic activities is a main obstacle, as alternative forms of tourism are mainly located in the Unit of Ioannina, relatively few are present in the Unit of Arta and fewer in the Units of Preveza and Thesprotia. - Through the pilot applications, touristic activities will be expanded throughout Epirus, connecting the coastline with the mainland. ● Limited Cooperation: <ul style="list-style-type: none"> - Cooperation among the regional units, municipalities, tourism agents, hotel owners and other stakeholders involved in sustainable tourism is not developed, under a single common goal and, as a result, the whole region is not presented as a single tourist destination. - The result of the pilots will be for Epirus to develop throughout the region alternative tourism packages linking the mountain with the sea, adventure with vacations, history with all resources. This will

	<p>bring more stakeholders together and will contribute to the development of a “common” touristic product.</p> <ul style="list-style-type: none"> ● <u>Lack of Infrastructure:</u> <ul style="list-style-type: none"> - In the long-term, it is expected that the bases for sustainable tourism in the Region of Epirus will be established, the right infrastructure will be created and the region will be properly promoted both in Greece and abroad. Epirus will thus be able to become a tourist destination as a whole, rather than a partial tourist destination.
<p>Which are the main touristic and mobility gaps tackled by your pilot?</p>	<ul style="list-style-type: none"> ● <u>Lack of Innovation:</u> <ul style="list-style-type: none"> - The packages will be in line with new tourism engagement related apps, interactive learning and crowdsourcing that will be developed in the context of the SUSTOURISMO Project. - On top of that, an innovative cooperation model may be developed and influence active tourism, with a low-impact and sustainable approach in the Area. ● <u>Lack of Information:</u> <ul style="list-style-type: none"> - A common touristic package will not only directly connect tourism with mobility, but also promote this interconnection through the app and the stakeholders involved. Such promotion will contribute to a broader impact and target group approach.
<p>How your pilot contributes to the overcoming of these touristic and mobility gaps?</p>	<p>As already mentioned, the pilots of Epirus aim to foster:</p> <ul style="list-style-type: none"> - “Physical” touristic mobility. - “Mass” touristic mobility. - Mobility with a focus on culture and nature. <p>Therefore, all the aforementioned challenges will be addressed through the different activities involved in the touristic package:</p> <ul style="list-style-type: none"> - As travellers arrive in the port, they will be welcomed by a volunteer guide who will inform them about the offered package and guide them in the suggested activities. - Using the “hop on – hop off” bus, they will experience an informational route around the area. - They will have the opportunity to use the city bikes to cycle around and towards nearby areas. - A guided tour will be implemented in famous sights and historical places, while the package aims to offer options such as river trekking and hiking, for an alternative touristic experience. <p>It is thus obvious, that tourists exploring the city will be involved in many activities combining alternative mobility with “leisure”, while getting information regarding cultural and natural history as well as alternative transport options.</p>

6.5 Initial orientation on the SUSTOURISMO pilot case development: Ljubljana Region pilot

<i>Questions</i>	<i>Orientation for pilot development</i>
<p>Which are the main opportunities for tourism and mobility growth in your pilot area?</p>	<ul style="list-style-type: none"> - Regional tourism needs a strong intervention in the restructuring and renewal of tourism infrastructure. - Tourist demand for natural and sustainable destinations. - Tourist demand for green sports destination. - In the pilot area is the capital of Slovenia Ljubljana with proximity to nature and big cultural heritage. - The study area is one of the leading destinations (key subjects of Slovenian tourism) as defined by the Strategy of Sustainable Growth of Slovenian Tourism 2017-2021. - Centre of Ljubljana is closed for motorized vehicles. - Well-developed network of cycling and walking paths in Ljubljana; Ljubljana has been chosen as the host of the Velo-city 2020 conference, the annual global cycling summit of the European Cyclists' Federation, due to the city's dedication to sustainable mobility, especially cycling. - Revitalized riverbanks of river Ljubljanica are suitable for cycling and walking. - The proximity and high concentration of green spaces in the study area encourage residents and visitors to cycle and walk. - Establishment of cycle paths and bike rentals. - Cycling tourism is one of the fastest growing types of outdoor recreation and tourism nationwide.
<p>Which are the main gaps for tourism and mobility growth in your pilot area?</p>	<ul style="list-style-type: none"> - Poor rail and bicycle connections, - Poor quality of railway infrastructure, - Insufficient financial resources of the state for the promotion of sustainable tourism, - Several different tourists, cultural and leisure strategies address a small area. These strategies are not always harmonized and don't follow the same vision, - The most recent development strategy of Ljubljana Marsh Nature Park ended in 2015, - Many strategic documents addressing the study area are ending in 2020, - Most strategic documents don't directly address riverside and nature parks tourism development, - Lack of recreational paths along Ljubljanica in the Ljubljana Marsh Nature Park, - Complicated procedure of renting a public bicycle for visitors,

	<ul style="list-style-type: none"> - Public buses connecting the Ljubljana Marshes run infrequently, especially on weekends and public holidays, - Poor condition of roads connecting the urban space of Ljubljana with natural areas in the south, - Lack of possibilities to combine public transport with cycling (for example train with bicycle), - Limited river accessibility in the Ljubljana Marshes.
Which are the main touristic and mobility challenges tackled by your pilot?	<ul style="list-style-type: none"> - Better multimodal transport connections between Ljubljana and nature parks, - minimizing tourists carbon footprint during their travelling around Ljubljana region, - increase attractiveness of travelling by train, - costs savings for tourists, - healthy choice of travelling around the region.
Which are the main touristic and mobility gaps tackled by your pilot?	<ul style="list-style-type: none"> - Lack of sustainable transport services for tourists in the region, - Lack of offers regarding taking bike on trains, - Lack of sustainable tourist offers for visiting surroundings of capital Ljubljana, - Pilot implementation area lies within Ljubljana Marsh Nature park and subjected to special park regimes, - Implementation area is sensitive landscape and is therefore suitable only for softer forms of tourism.
How your pilot contributes to the overcoming of these touristic and mobility gaps?	<ul style="list-style-type: none"> - Launching a new multimodal sustainable car sharing service, - Restructuring and renewal of tourism infrastructure, - Integration of public passenger transport into the tourist offer with emphasis on railways and cycling, - Improved sustainable mobility planning on regional level, - New innovative tourist products / tourist packages, - Sustainable tourist products / tourist packages.

6.6 Initial orientation on the SUSTOURISMO pilot case development: Zadar Region pilot

The city of Zadar is spread mostly in the plains; therefore, it is very suitable for cycling. Also, the city does not occupy a large area on the surface, while at the same time abounds in various cultural attractions and social facilities surrounded by marine beauty. Only certain suburbs of the city are located on a hill, which does not require significant effort for cyclists. On the contrary, these parts of the city provide crossed views on the city and the islands, and the city and its hinterland. Several islands and villages in hinterland are under the authority of Zadar and they are very suitable for cycling considering their natural environment. However, the basic limitation imposed on the development of bicycle traffic in the city of Zadar is the existing infrastructure derived from the European model of the city according to which the city was developed. This is especially present in the old city (peninsula), which is adapted to pedestrian traffic, although the situation is not significantly different in other parts of the wider centre. Traffic is adapted to car traffic, which lacks in parking spaces, especially during the tourism season. In such a situation, cars often restrict the flow of pedestrian and bicycle traffic. In recent years, several separated bicycle lanes have been built in the city of Zadar, which are used in combination with other modes of traffic. However, considering all the demands placed on sustainable urban development and the quality of life in cities, and the development of cycling tourism, in the coming time it is necessary to think more intensively on the development of bicycle paths and routes that will raise the quality of tourism in Zadar.

In accordance with the basic possibilities and limitations of the development of cycling tourism in the city of Zadar, as well as the standards that need to be ensured, when developing and establishing a cycling route in the city of Zadar, it is necessary to consider the following elements, which outline the basic criteria (safe, direct, cohesive, comfortable and attractive cycling):

- Planning of future cycling infrastructure should be included in planning of other infrastructure (building, parks, roads, bridges, ports, bus stations, etc.);
- It is necessary to ensure continuity and connection with the existing and planned bicycle infrastructure (paths, lanes, roads) and connection with the existing bicycle routes on the local, regional and national level;
- Planning, designing and development of cycling routes should be in accordance with the relevant standards (e.g. EuroVelo standards);
- When planning, designing and developing of cycling routes all the elements should be included in the cycling route (attractions, sightseeing, viewpoints, catering facilities, parking places and services, rest areas, info points with information on services and locations for transfers of cyclists, etc.);
- When planning, designing and developing of cycling routes all the area under the authority of Zadar should be connected in order to connect the area and to provide various experiences (centre, suburbs, hinterland and islands);
- Safety is in the first place, therefore existing suitable cycling infrastructure (cycle paths or lanes) should be used, avoiding cycling routes on mixed traffic roads with a high or very high traffic;
- In the area where is no separated cycle tracks and no possibility to avoid mixed traffic roads, traffic calming should be used in urban areas and along relevant inner-city sections of main

bicycle routes (speed humps, lane narrowing, signal progression and usage of different materials, colours, street furniture and plants to achieve an amiable street environment, etc.);

- The surface should be suitable for cycling in all conditions, and asphalted or paved with another resistant material;
- Detailed information about the route and along the route should be provided on a different media (interactive maps, points of interests, attractions, services, information board or centre along the route, etc.)
- Signalisation on the routes should be settled in accordance with the relevant national or international standards to provide safety and security;
- Signalisation about the routes and on the routes should be easily understandable and settled in accordance with the relevant tourism signalization in the area of Zadar;
- Management of the cycling routes for coordination, promotion and tourism valorisation should be established.

This approach assures satisfactory tourist services related to different types of cyclists, their needs and expectations, contributing to the total tourism supply and level of quality of tourism in Zadar. It also tends to raise quality of life for the local community, which is primary goal of the sustainable tourism.

6.7 Initial orientation on the SUSTOURISMO pilot case development: Tivat Region pilot

<i>Questions</i>	<i>Orientation for pilot development</i>
<p>Which are the main opportunities for tourism and mobility growth in your pilot area?</p>	<ul style="list-style-type: none"> - Tivat has good geographical position (e.g. vicinity of Kotor, Budva, Dubrovnik etc.) and traffic conditions (e.g. airport Tivat, marina Porto Montenegro, Adriatic road “Jadranska magistrala” etc.) in Boka Bay and Montenegro. - The promotion of low carbon emission opportunities in tourism and transport on national and local level. - New investments in transport infrastructure and tourist resort (e.g. Luštica Bay, Porto Montenegro). - New investments in modernization of airport Tivat, that will provide new opportunities for the whole coastal area of Montenegro. - Innovativeness of local/regional tour-operators in sector of new excursions and tourist packages (e.g. Tuk tuk, Electric boats, e-biking tours etc). - Vicinity of Kotor (cruising port) and possibilities in development of tourist products that includes Tivat as new and popular destination (e.g. Porto Montenegro, Gornja Lastva, Luštica Bay). - Existence of exclusive and expensive helicopter mobility opportunities (due to airport Tivat). - Good potentials for safe sea transport inside the Boka Bay during whole year. - Tivat area is quite convenient for biking and similar mobility options due to its relatively flat terrain.
<p>Which are the main gaps for tourism and mobility growth in your pilot area?</p>	<ul style="list-style-type: none"> - Public transport service needs adaptations in order to be more convenient for tourists and their needs to visit attraction outside the city centre. - Lack of “low carbon” mobility options, especially for tourists that want to explore destination without tour-guides and tour-agencies; - Renting services of bikes, e-bikes and similar modes of transport need further adaptation in sense of price and quality. - Lack of cooperation among the different stakeholders on national and/or local level, especially in context of innovations and entrepreneurship (e.g. creation of new products, excursion, attractions). - Dominant usage of car transport (e.g. rent-a-car, taxi and mini vans).
<p>Which are the main touristic and mobility challenges tackled by your pilot?</p>	<ul style="list-style-type: none"> - Better traffic connections between city centre and attraction outside the town. - Promotion and development of new tourist routes and roads that further promote existing attractions, activities and events. - Insight into “low carbon” transport opportunities in Tivat.

	<ul style="list-style-type: none"> - Affordable alternative mobility opportunities for tourists and citizens (e.g. biking, e-biking, hiking, electric bike/cars).
<p>Which are the main touristic and mobility gaps tackled by your pilot?</p>	<ul style="list-style-type: none"> - Lack of alternative mobility opportunities for tourists and citizens. - Lack of tourist attractions and products that use alternative mobility opportunities. - Need for more innovative approach towards existing and new offer in Tivat, in order to create new jobs, promote sustainable development and foster entrepreneurship.
<p>How your pilot contributes to the overcoming of these touristic and mobility gaps?</p>	<ul style="list-style-type: none"> - Suggestion of new tourist products that will foster alternative mobility options. - Promotion of new possibilities in area of contemporary mobility options, especially via good practice that will be obtained within this project. - Cooperation with local stakeholders, especially entrepreneurs, in order to develop and valorise new tourism and mobility opportunities in Tivat. - Connection between existing attractions (e.g. Luštica Bay, Porto Montenegro, City Park) will be organized in more efficient and effective way, offering better tourism and mobility experience that will represent a new value for destination, tourists and citizens.

6.8 Initial orientation on the SUSTOURISMO pilot case development: Berat Region pilot

All key actors in Albania agree that tourism is becoming the keyword of our country's national, social and economic development. The data, year after year, show the growth of tourism as one of the sectors that bring more revenue to the state budget, entrepreneurial and family budgets, with a direct contribution of 8.5% to GDP and an indirect added value of 26.2%. Tourism is also the sector with the highest employment potential. The following table presents an initial orientation on the SUSTOURISMO pilot case development for the Region of Berat. It presents an analysis of main opportunities and the main gaps and challenges for tourism and mobility growth in the region, alongside with a discussion of how the SUSTOURISMO project will tackle and address these issues in order to contribute to overcoming these touristic and mobility gaps.

<i>Questions</i>	<i>Orientation for pilot development</i>
<p>Which are the main opportunities for tourism and mobility growth in your pilot area?</p>	<ul style="list-style-type: none"> <li data-bbox="580 696 1396 981"> <p>- The city is a UNESCO world heritage site</p> <p>Berat was registered on the UNESCO World Heritage List and valued as a rare example of typical architecture. According to the evaluations, Berat is considered as an example of coexistence of various religious and cultural communities for many centuries. The UNESCO trademark provides a secure endorsement for the tourism development and attractiveness.</p> <li data-bbox="580 1010 1396 1921"> <p>- The city is rich in culture and history</p> <p>Recognising the uniqueness of Berat, as early as 1961 the town was declared a Museum City by the Government of Albania. The city is very rich in tradition, history and culture. Berat's Historic Centre is comprised of three areas – the Castle, Mangalem and Gorica quarters, each beholding unique properties. Berat Castle is not only one of the largest inhabited Castles, but also a stone archive, that offers a variety of styles and contributes of different époques: Roman-Byzantine, Albanian and Ottoman. The buildings inside the Castle were built during the 13th century and because of their characteristic architecture are preserved as cultural monuments.</p> <p>The old quarters of Mangalem and Gorica are well preserved areas containing buildings with characteristic architecture with a great number of windows, narrow charming paths and religious objects. The two quarters are connected with each other by Gorica bridge. Ruins of Gorica castle, another castle in the city that belongs to the same period (IV BC), are positioned on the hill behind Gorica quarter.</p> <p>The city has two national museums and over 40 churches and several mosques, each beholding unique and valuable history, tradition and culture</p> <li data-bbox="580 1951 1396 2018"> <p>- The city's landscape is favorable for the development of sustainable mobility</p>

	<p>The city of Berat runs wide the Osumi river alongside many parks. Furthermore, the city is surrounded by several hills making it very appropriate for the development of sustainable mobility. Bike trails, green automobiles and shared vehicles can be effectively be used in the city of Berat and its surrounding areas. The natural landscapes in the close-by villages offer spectacular panoramic views. They can easily be reached by the before-mentioned mobility services</p> <ul style="list-style-type: none"> - The national strategy for tourism development considers sustainable tourism a top priority <p>The new Albanian strategy for tourism development is relying on <i>sustainability</i> as a key factor for turning the sector into the most important pillar of the country's economy. This focus shifting is very important for SUSTOURISMO project as it can capitalize from this momentum into fulfilling its objectives and leading tourism development in the region and aiming to maximize the sustainable use of our resources.</p> <ul style="list-style-type: none"> - There is a notable increase in usage of technology services <p>There is a notable increase in the usage of technology services, especially in younger generations. Though their current application in the tourism sector is poor, great progress is expected in the near future. For instance, museums have very recently started to present 3d virtual tours. Other institutions and tourism related bodies have started to incorporate the usage of information technology systems into their products and services.</p>
<p>Which are the main gaps for tourism and mobility growth in your pilot area?</p>	<ul style="list-style-type: none"> - Need for improvement in the tourist infrastructure <p>The Region of Berat, despite the beauty of its nature and long-standing cultural heritage, suffers from qualitative tourist infrastructure. The city needs the development of bike trails (currently there are only few kilometers), improved touristic signs, and road infrastructure.</p> <ul style="list-style-type: none"> - Diversification and improvement of touristic offers and products <p>Beyond the natural and historical-cultural attractions, Berat's tourism offer could be improved and the opportunities to combine different types of tourism need to be enhanced. Although opportunities are available in the territory, the lack of a diverse and comprehensive tourist offer, which combines the best of tourist attractions for the development of sustainable tourism, has limited the potential for increased tourist overnight stays, increased spending and balanced distribution in the territory</p>

	<ul style="list-style-type: none"> - Need for improvement in the accommodation capacities, the quality accommodation and the quality of service <p>In areas that attract more tourists, the number of beds – though increased in the last years – has still possibilities for extension - which certainly has an effect on the total number of visitors.</p> <p>The quality of accommodation on the new facilities is good, but many accommodation structures need to improve their quality. The quality of service is another issue that needs to be resolved. The need for training employees in the touristic sector is urgent. In terms of human resources and services offered to tourists, they leave much to be desired and a training program is needed to foster a quality leap in tourism.</p> - Need to prolong the tourism season <p>Although the region of Berat has a typical Mediterranean climate, which makes our country enjoy 250 days of sunshine, the tourist season is mostly focused from May to October. Although there is a demand for services for a long period of the year, supply is lacking to successfully reply as sporadic development has given tourism a highly seasonal character. For this industry to become one of the pillars of the region’s and the country’s economy, the seasonal effects of tourism need to be mitigated through the development of other forms of sustainable tourism, increasing the number of visitors, overnight stays and consequently tourism revenue</p> - Informality in tourism activities <p>Many of the accommodation facilities, but also other service providers, such as restaurants or tourist guides, operate in informality by creating the ground for lower quality services, affecting the safety of tourists and the image of the place.</p> - Need for enhanced use of information technology systems <p>The use of information technologies in the tourism industry is limited. With the exception of a sporadic case, usually with the help of international organizations, the provision of digital services to tourists is still underdeveloped. Their use is at the same level for marketing services and products and for selling in the markets</p> - Lack of standardization and system of classification <p>In Albania, and evidently in the region of Berat, accommodation facilities and other tourism service providers are not classified according to the standards for the services they provide</p>
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	<ul style="list-style-type: none"> - Need for improvement between different stakeholders <p>There is room and a need for improvement between different stakeholders (national, regional and local public authorities; private businesses and business support organizations; tour guides and agencies; travel operators, and other important stakeholders).</p>
<p>Which are the main touristic and mobility challenges tackled by your pilot?</p>	<ul style="list-style-type: none"> - Diversification and improvement of touristic offers and products - Improvement on the collaboration between different stakeholders - Enhanced use of information technology systems - Fighting informality in tourism activities
<p>Which are the main touristic and mobility gaps tackled by your pilot?</p>	<ul style="list-style-type: none"> - Need to prolong the tourism season - Need for improvement in the accommodation capacities, the quality accommodation and the quality of service - Need for improvement in the tourist infrastructure
<p>How your pilot contributes to the overcoming of these touristic and mobility gaps?</p>	<ul style="list-style-type: none"> - Diversification and improvement of touristic offers and products <p>Through the SUSTOURISMO project, RCB aims to contribute to a diversification of the touristic offers and products. In particular, our pilot actions will be focused on three directions, namely:</p> <ol style="list-style-type: none"> a. <i>Exploring the historic centre on foot:</i> we will offer a variety of historical and cultural monuments and sites to be visited by tourist. Through promotion, we will shed light on some points of interests that have been neglected by tour agencies and tourists, but that have an important cultural value b. <i>Adventurous tourism:</i> We will offer a variety of bike tours to be explored and adventurous sports such as rafting and paragliding. The usage of bike trails will be an improvement in terms of the existing conditions and the paragliding sport has not been used in the city by tourists (only few individuals). We aim to turn it into a tradition. c. <i>Leisure time in the city & surrounding areas:</i> we will offer tourist the possibility to not only meet the locals, but to “be the locals”, by allowing them to <i>learn</i> from artisans and to practice their skills; to perform guided visits in wineries and agro-touristic centers and to enjoy from our offers in numerous bars and restaurants during their leisure time.

	<ul style="list-style-type: none"> <li data-bbox="580 264 1401 705"> <p>- Improvement on the collaboration between different stakeholders</p> <p>RCB, in its capacity as a regional public authority, will focus greatly on improving the collaboration between different stakeholders (municipalities, touristic agencies, mobility service providers etc) in order to offer tourists a complete and all-encompassing offer in order to maximize their stay in the region. We will also collaborate with other municipalities (Berat and Corovode) on two EU-funded projects (e-Nature and Dynamob) that share with SUSTOURISMO similar objectives on sustainable tourism and mobility.</p> <li data-bbox="580 728 1401 1064"> <p>- Enhanced use of information technology systems</p> <p>Through the SUSTOURISMO app we aim to significantly improve the usage of information technology systems by tourist in order for them to have a complete view of the main points of interests and guided paths to visit them. We will further cooperate with other institutions (e.g. 3d virtual tours in museums) in order to include important services provided in the field of tourism.</p> <li data-bbox="580 1086 1401 1265"> <p>- Need to prolong the tourism season</p> <p>Though not directly, the diversification of the touristic offer and the stronger focus on sustainable tourism will affect the duration of stay of tourists in the region.</p> <li data-bbox="580 1288 1401 1579"> <p>- Need for improvement in the accommodation capacities, the quality accommodation and the quality of service</p> <p>RCB will collaborate with the <i>technical high school of tourism</i> in the region in order to pursue younger generations on the importance of tourism services and to identify means of collaboration for the <i>training</i> of students in services part of the tourism sector.</p> <li data-bbox="580 1601 1401 1861"> <p>- Need for improvement in the tourist infrastructure</p> <p>Collaboration with the municipality of Berat aims to improve the current tourism infrastructure in terms of <i>adding bike trails, adding and improving touristic signs</i> and enhancement of the general road infrastructure connecting the city and the surrounding areas.</p>
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6.9 Initial orientation on the SUSTOURISMO pilot case development: Belgrade Region pilot

<i>Questions</i>	<i>Orientation for pilot development</i>
Which are the main opportunities for tourism and mobility growth in your pilot area?	<ul style="list-style-type: none"> - The Strategy of Sustainable Urban Development of Serbia until 2030 support the improvement of air quality by applying green infrastructure, roof landscaping, restricting the movement of individual motor vehicles in the central urban zone, balancing environmental capacities and burdens caused by activities in economy, agriculture, tourism, energy, etc. - The Strategy of Sustainable Urban Development of Serbia until 2030 support improvement of tourist infrastructure and superstructure (construction and arrangement of bicycle paths and other cultural thematic routes, etc.). - also, the Strategy states that the ministry in charge of tourism will support activities on development of ICT digital marketing and online promotional and reservation tools and the web product portals; to support the most advanced ICT and software solutions (creation of web portal DMO and exits to digital platforms) that promote the promotion and capacity building local and national tourism products. - Belgrade city development strategy till 2021 - The strategic commitment of the City of Belgrade supports the development of traffic system based on the principles of sustainable mobility and changing the hierarchy between types of traffic, supporting sustainable mobility of central urban zones. - Belgrade Tourism Development Strategy, 2008 supports the development of a network of bicycle paths; to visit tourist destinations by specialized transport, walking and cycling; continue the development of cycling in the city and on the routes to green and recreational areas in the city and its peripheral zone.
Which are the main gaps for tourism and mobility growth in your pilot area?	<ul style="list-style-type: none"> - Great use of cars - Acceptance of a “new” way of moving - Lack of coordination among the different stakeholders
Which are the main touristic and mobility challenges tackled by your pilot?	<ul style="list-style-type: none"> - Better connections among city centre to green and recreational areas in the city - Promotion alternative way of movement to tourists.
Which are the main touristic and mobility gaps tackled by your pilot?	<ul style="list-style-type: none"> - Not enough sustainable transport services for tourists - Sustainable transport services for tourists that exist are not enough promoted

How your pilot contributes to the overcoming of these touristic and mobility gaps?

- Connecting different stakeholders
- Promoting cycling to green and recreational area
- Promoting cycling and walking

7. Conclusions and key recommendations

Analysis of the history of tourism and sustainable development policies at the EU level shows an asymmetry in approach: while sustainable development is one of the pillars of EU policy, the involvement in tourism is more recent, and subsidiarity tends to prevail. This asymmetry is particularly visible in tourism and environment policies. Notably, the European vision on sustainable tourism and transport is not representative of the gravity of, for example, the externalities caused by touristic transport, specifically air transport. While there is action at a destination and product level to deal with local environmental problems, there is a lack of coherent policy on larger issues such as the impact of tourist travel on climate change. The absence of an integrated EU vision about EU-wide travel and sustainable tourism means EU funding for sustainable tourism is missing direction and strategic vision.

A strategic and integrated approach to sustainable tourism would include all impacts of tourism, including environmental and social consequences. The critical impacts on the environment of tourist origin-destination travel mean its dependence on aviation and the construction of new airports needs careful consideration, while alternatives such as a better integrated and accessible rail system.

Destinations may develop sustainably by directly reducing the impacts of accommodation, (leisure) facilities and local visitor transport. Marketing focus can also influence the mobility generated through origin-destination transport. Certification, networking, monitoring, carbon management and the development of local governance schemes are to be encouraged.

Sustainable business and product development is one key for sustainable development of tourism. As the unsustainable development of tourism is strongly related to the trend for long haul markets to develop faster than short haul domestic markets, there is scope for supporting domestic and intra-EU tourism development and products.

Finally, there is a need for improved assessment of the environmental and social impacts of tourism. This should include combined transport and tourism models to determine the full impacts of transport and tourism on a range of environmental and social factors and development of better statistics about tourism impacts.

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