CPMR Intermediterranean Commission

Tourism in the Mediterranean

State of the art, impacts and measures following the COVID-19 crisis: An opportunity for the sector to evolve towards more sustainability

ANNEXES

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Annex I – Impacts of the COVID-19 pandemic at National and Regional levels in the Mediterranean Area

Albania

According to statistics from the Bank of Albania, the country’s economy benefits from about €2 billion from tourism. “Tourism represents a major economic driver and is one of the world’s top youth employers, providing jobs for 1 in 10 people globally, contributing over 10% to global GDP. In Albania, tourism and travel contribute over 25% of total employment and 27% of the GDP”. Although the overall damage to the tourism industry in the summer season 2020 would need a deeper analysis, some preliminary data of the month of July already showed the severity of the pandemic for the sector, with a decrease of more than 67% of foreign tourists compared to the same period from 2019. Besnik Vathi, president of the Association of Tour Operators, assessed that the lack of foreign visitors is expected to cost the country about €1.3 billion in revenue losses, while national visitors and visitors from Kosovo will not be able to compensate these losses.

Croatia

According to some estimates, Croatia’s total exposure to tourism receipts can be expressed as a share of 15% of GDP. According to this, Croatia, together with Malta, is the most exposed country in the world. If Croatia is so high on the list of tourist dependencies worldwide, the economic prospects for Dalmatia may seem worrisome. A survey by the Croatian Chamber of Commerce (CCC) indicates that two thirds of Croatian companies (66%) – already back in April 2020 were already feeling the negative effects of the coronavirus situation on their business, and more than half (53%) reported a decrease in turnover. In the same line, institutional forecasts predicted three possible scenarios ranging from a 60% to 90% potential drop in tourist nights in the country over the late Spring and Summer.

1 For more details, see: https://www.tiranatimes.com/?p=145185 (April 2020).
7 “Destinations in Croatia - cities like Zagreb, Dubrovnik, Split and even Opatija - are likely to suffer the most during this pre-season, many business meetings are being organised at the moment, many tourist groups from all over the world are also arriving and our cities will have similar disadvantages to those in Europe” said PM Cappelli, pointing out that despite the fact that the COVID-19 pandemic is uncertain, they have carried out various analyses, on the basis of which they have proposed three possible scenarios for tourism in Croatia. “The first scenario or level with a 60% drop in overnight stays is unfortunately already being realized. But as health forecasts and headquarters around the world are different now and June or July are mentioned as dates of possible relief, they would reach another level with a 75% drop in overnight stays. For now, we are closer to this scenario of a 75% drop in overnight stays, assuming that we attract tourist traffic in August, September, October and the end of the year. But if this is not possible because of the continuation of the pandemic, we are going to the third level, which is still far away and I hope it will not come, and that would be a 90% drop in overnight stays” said Minister Cappelli in an interview with Hina. For more details,
Based on the official statistics of the Croatian authorities, in July 2020 the tourism sector operated at approximately 60% of the results from 2019 and revenues from tourism are expected to amount around only 30% of 2019 total. In mid-October, the Central Bank of Croatia (Hrvatska Narodna Banka) acknowledged that “despite the favourable current projections compared to the expectations from July, tourism revenue will significantly decline in 2020, which will have a negative impact on the current and capital account surplus, which could decrease slightly to 3.7% of GDP this year.”

**Cyprus**

Tourism is the main driver of the Cypriot economy, contributing to about 22% of its GDP. In the context of the pandemic, according to the ACTA (Association of Travel Agents of Cyprus), Cypriot tour operators – responsible for around 70% of inbound tourism and 100% of outbound tourism – faced the worst crisis in their history following waves of holiday cancellations due to the coronavirus epidemic. In fact, in addition to the reduction in air services worldwide, there have been cancellations of conferences and package holidays. Back in March, the loss amounted already to about €30 million due to the collapse of sales. Most updated figures released by the Statistical Service of Cyprus (CYSTAT) indicated that tourist arrivals in the country plunged more than 85% in the first seven months of 2020, with about two-thirds of this year’s tourists arrivals recorded before the beginning of the COVID-19 crisis and lockdown in the middle of March. This means a real shock for the country, that reached approximatively 4 million visitors in 2019, about four times the island's population.

**France**

In 2019, Travel and Tourism in France was responsible for 2.7 million jobs of 9.4% of the country’s total workforce, generating more than €205 billion GDP, or 8.5% to the French economy.

Closing the summer season at the end of August 2020, the World Travel and Tourism Council (WTTC) predicted a loss of €131.2 million a day and of €48 billion in total for the French economy, due to the collapse of international travel during 2020. In particular, due to COVID-19 pandemic, a drop in international visitor spending by 82% is to be expected. Similarly, more than 2.1 million jobs would at risk in the worst-case scenario elaborated by WTTC. The consequences of such a situation might especially threaten cities very dependent on international visitors, like Paris, one of the world’s major destinations for business and leisure travel: indeed, in 2018 international visitors spending accounted for almost 74% of the total tourism spending in the city, while domestic tourists only making up the remaining 26%.

According to the outcomes of the survey “Impact of the COVID-19 pandemic on EU and Mediterranean tourism industry” the CPMR Intermediterranean Commission sent to all its member regions, 100% of businesses in tourism sector in Région Sud had to furlough staff during and after the lockdown. So far, the

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10 Data per country available here: [https://wttc.org/Research/Economic-Impact](https://wttc.org/Research/Economic-Impact).
11 For more details, see: [https://www.financialmirror.com/2020/03/14/cyprus-tourism-fires-distress-signal](https://www.financialmirror.com/2020/03/14/cyprus-tourism-fires-distress-signal) (March 2020).
13 Data per country available here: [https://wttc.org/Research/Economic-Impact](https://wttc.org/Research/Economic-Impact).
Region also estimates the average percentage of businesses' loss of annual revenue due to the COVID-19 crisis at 25%.

Based on the same survey results, businesses in Corsica are expected to lose from 50% to 80% (according to sectors) of annual revenue in 2020. During a “regular” season, tourism represents 33% of the region's GDP (including transports), almost 4.5 times more than the national share of GDP. Most affected sectors in Corsica are those which activity is highly seasonal (accommodation, catering, but also commerce, leisure activities). In particular, activity in both accommodation and catering sectors was almost non-existent in May, when the occupancy rate in accommodation fluctuated between 0% and 1%. In the last week of June, the rate of passengers in air transport was still -65% compared to the same week in 2019, and -63% for maritime transport. Overall, for instance, on all the French Mediterranean coasts, yachting activities fell by 70% in 2020 compared to last year, impacting many yacht services companies.14

Furthermore, the massive use of short-time work confirmed the high number of jobs threatened on the island. According to data collected by DIRECCTE Corse, 10,448 requests for prior partial activity authorisation were submitted from March 1 to June 9, and nearly 3,000 of them were in the tourism sector. In this context, it is estimated that more than 7 out of 10 establishments which activities are linked to tourism submitted a partial activity request.15

In Occitanie region, the impact of the pandemic was ranked at the highest scale both in terms of economic and social implications. Most businesses saw their staff on furlough since the beginning of the pandemic,

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14 For more details, see: https://www.petitesaffiches.fr/actualites,069/economie,045/grande-plaisance-des,19328.html (September 2020).
and seasonal workers were extremely affected particularly due to the absence of professional offers available in the last months. Moreover, although financial support was provided by the state, many businesses indebted, and some have even faced bankruptcy.

According to responses collected through the CPMR Intermediterranean Commission’s survey, the most affected sectors in this region were serviced accommodation (apartments, B&Bs, etc.), attractions and activity operators as well as cultural sites. Privately owned micro enterprises as well as SMEs faced major difficulties since the beginning of the crisis, although large corporations are not at rest either: indeed, it was estimated that 7 out of 10 SMEs or large corporations had to furlough staff since the beginning of the pandemic. Furthermore, the summer season did not help a relaunch of this sector as the percentage of businesses who managed to hire staff during the season seems to be non-existent due to a lack of finances and the very slow pace of touristic activities.

To date, regional businesses lost between 60% to 90% of their annual revenue due to the global COVID-19 pandemic. Although the quality of touristic products and activities were not harmed, the situation does not allow their use at full potential. The region was able to gather €25 million for an urgent plan of action that managed to help 500 beneficiaries (privately owned micro-enterprises and SMEs).

Greece

In Greece the tourism sector is vital representing a fifth of the country’s economy and more than a quarter of jobs, according to the World Travel and Tourism Council. Back in March 2020, the Hellenic Chamber of Hotels estimated that the losses of the Greek hotels linked to the virus outbreak amounted to €522 million (in terms of cancellations of rooms and conferences). Moreover, a slowdown of the pace of future reservations was recorded: by 72% in 92% of the hotels operating all year round, as well as by 58% in 83% of the seasonally operating hotels, in comparison with 2019. Already at the beginning of the crisis, 91% of the all year-round operating hotels estimated that they would have a loss of turnover by 51% in 2020, while 83% of the seasonal operating hotels predicted a loss of turnover by 36% for 2020. In line with this, about 20.5% of the overall employment in hotels was already at risk.

According to Alpha Bank’s Weekly Economic Developments bulletin on tourism back in March 2020, a decline of 940,000 travellers in incoming travels was expected for 2020. Closing the summer season, latest figures confirms the dramatic effects of COVID-19 generated crisis on the tourism industry, showing the high vulnerability of the sector in Greece, one of the hardest hit economies. According to the recent data published in a study by Ira Media, Greece’s tourism revenues will reach €3.5 billion in 2020, compared to €18.5 billion last year. This study also showed that over 1,000 out of 6,800 accommodation facilities that received health protocols in the country did not open this year due to low occupancy rates. In July 2020, these rates reached 30% (including domestic travellers), while in August (traditionally the strongest month of the season) it did not exceed 50% in most destinations. However, losses might be for instance partly avoided in the islands of Rhodes and Crete due to the extended summer season that usually ends in late September or early October, according to the study.

Regarding unemployment in the tourism sector, it increased by 18.3% in June, and by 13% in July compared to the employment rates of 2019. Based on the responses to the CPMR Intermediterranean Commission survey “Impact of the COVID-19 pandemic on EU and Mediterranean tourism industry,”

17 For more details, see: https://news.gtp.gr/2020/10/06/study-greek-tourism-sees-severe-losses-new-normal (October 2020).
around 8 out of 10 micro-enterprises and SMEs in tourism sector had to furlough during and after the lockdown in the Region of Western Greece, while half of firms and large corporations had to do so. On the other hand, only 2 out of 10 businesses could hire seasonal staff this year in the same region. In Ionian Islands, around 90% of micro-enterprises and of large corporations furloughed staff during the lockdown (6 out of 10 SMEs).

**Italy**

Italy has been one of Europe’s hardest hit countries by the COVID-19 outbreak and is expected to suffer an economic shock due to a lack of revenue from tourism.

According to a report published in September by the World Travel & Tourism Council (WTTC), Italy is expected to lose €36.7 billion in 2020 due to the COVID-19 crisis. As the influx of international visitors continues to fall, international spending could drop by 82% by the end of the year, which means that every day could cost €100 million to the Italian economy. Cities more reliant on international visitors, such as Venice and Florence unsurprisingly resulted to be the most affected. In terms of economic impact, the direct contribution of tourism to the Italian economy should decrease by 2.5% in 2020 (3.2% of GDP) compared to 2019 (5.7% of GDP). Nevertheless, this decrease is lower than the one expected in many other countries such as France (-4.5%) or Spain (-3.1%). With the current scenario, the volume of revenue for the sector in Italy should slightly exceed the figures of 2019 only in 2023. Still, according to the WTTC report, 2.8 million jobs created by the travel and tourism sector in Italy are at risk (29 million jobs in Europe).

Moving to the regional scale, the scenario confirms these trends. In Sicily, the decline of influx of both domestic and foreign visitors during the summer season was among the most important in the country. Moreover, 70% of congresses were cancelled during the same period on the island, which also represented an important shortfall for the tourism sector.

<table>
<thead>
<tr>
<th></th>
<th>Italian tourists</th>
<th>International tourists</th>
</tr>
</thead>
<tbody>
<tr>
<td>June</td>
<td>-79.9%</td>
<td>-98.7%</td>
</tr>
<tr>
<td>July</td>
<td>-33.8%</td>
<td>-84.2%</td>
</tr>
<tr>
<td>August</td>
<td>-15.8%</td>
<td>-75.6%</td>
</tr>
</tbody>
</table>

*Influx of visitors in Sicily in the 2020 summer season compared to 2019.*

According to the CPMR Intermediterranean Commission’s survey, the Lazio Region received around 6,000 applications for regional financial support between May and June 2020, for a total of €20 million granted, and more than 2,500 in September, for a total of €10 million granted. Applicants equally represented

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micro-enterprises, SMEs, large firms and corporations. This situation was particularly due to the decrease of incoming visitors, above all in Rome.\textsuperscript{22}

Lastly, based on the same survey results, the Region of Tuscany registered a decrease of 6.8 million of overnight stays by foreign tourists during this summer. The small increase of domestic tourism (+257,000 overnight stays in the same period) could therefore obviously not compensate these losses. Economically speaking, the direct contribution of tourism sector to the regional GDP is 6\% (11\% overall). Over 50\% of this count on the flow of foreign tourists. Thus, the drastic reduction of intercontinental connections for a long time would cause a very significant damage on regional GDP.

\textbf{Malta}

According to Standard & Poor’s, the COVID-19 crisis will cause a sharp recession in Malta, contracting the national economy by 8\% in 2020. In particular, Malta’s economy is expected to be relatively more affected than that of other countries by the impact of COVID-19 on tourism, given its high dependence on this sector: in this sense, tourist arrivals and hotel occupancy are not expected to return to 2019 level before 2022.\textsuperscript{23} Official figures showed that Malta lost out on €251 million in tourism revenue in July, which represents more than 88\% drop compared to the same month last year, or the equivalent of €8 million a day. Though the airport reopened on July 1 to a list of “safe-corridor” countries, and then reopened fully on July 15, people continued to stay away from the island. Indeed, total nights spent in July went down by 75.3\%. Overall, trips to Malta for the first seven months of 2020 amounted to 418,959, down 72.3\% over the same period in 2019.\textsuperscript{24}

\begin{figure}
\centering
\includegraphics[width=\textwidth]{image.png}
\caption{Amount of incoming visitors in the Region of Lazio (January 2019 - August 2020)}
\end{figure}

\textsuperscript{22} For more details, see (in Italian): \url{http://www.regione.lazio.it/statistica/it/lazio-in-numeri/turismo/arrivi-turisti-fonte-dati-regione-lazio}.

\textsuperscript{23} For more details, see: \url{https://www.maltatoday.com.mt/news/national/104671/covid19_impacts_will_deliver_sharp_recession_in_malta_say_standard_poors#.X2SYRotS85s} (September 2020).

\textsuperscript{24} For more details, see: \url{https://timesofmalta.com/articles/view/tourism-spending-dropped-by-almost-90-per-cent-in-july.817476} (September 2020).
Montenegro

At the beginning of the pandemic, Montenegro remained for some time one of the few European countries to have managed to resist the first wave of the virus, with no active cases of contagion, thanks - among other things - to strict measures adopted by the national government. However, as in many other Western Balkans countries, the situation changed radically in the middle of June, significantly hitting the summer season that had just begun. Indeed, the main season in Montenegro – covering the period from June to September – accounts for 80% of total annual tourism receipts, which highlights the high seasonality of tourism in the country. In addition, Montenegro relies predominantly on international tourism from the Balkans, Russia and EU countries. The impact of the world events on the Montenegrin economy has long been felt, and tourism is currently one of the key sectors to be affected: in fact, together with related services, tourism accounts for almost 25% of the country's GDP and has generated more than €1 billion in revenue in recent years. In October 2020, the World Bank acknowledged that Montenegro’s economy is expected to contract 12.4% in 2020 due to the COVID-19 pandemic, before bouncing back to 6.9% in 2021: the total output loss due to the crisis is projected to be fully recovered only in 2022 when the economy is expected to grow 4.2%.

Portugal

The country attracted more than 16.3 million foreign visitors in 2019, up from about 10 million in 2014. With the sector closed, the impact on Portuguese growth was indeed significant: a 25% reduction in tourism activities - both non-resident visitor tourism and domestic tourism - due to COVID-19, was expected to lead to a 2.9% reduction in annual GDP in Portugal, according to estimates released back in April 2020 by the National Institute of Statistics (INE). Most updated figures confirmed these preliminary trends: indeed 80% of tourist accommodations recorder cancellations of reservation between March and August, which resulted, already in March, in a 60% year-on-year fall in profits. Going forward, the scenarios for 2020 do not seem encouraging either: in Q1 2020, the evolution of the sector’s profits suggests that activity was 20% lower than usual. Already in the second quarter, at the peak of the pandemic, the data suggest that activity would be 90% lower. In a scenario in which the activity rate would recover to 40% in Q3 and to 60% in Q4, the reduction in the sector’s activity in 2020 as a whole would be close to 60%, which would mean that the tourism sector alone would be responsible for a fall in GDP of around 9% this year.

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27 For more details, see: https://www.dw.com/sr/korona-virus-razara-crnogorski-turizam/a-52803516 (April 2020).
**Slovenia**

With the expansion of COVID-19, Slovenian tourism experienced the most intense and deepest crisis since its independence. According to the Slovenian Tourist Board, already back in April, a 60% drop in demand for foreign tourists was expected in the country, pending the publication of national measures by June. Coming to the end of the summer season, this trend has been confirmed by the National Statistics Office: in July the number of international tourists' overnight stays fell by 66.3%. On the contrary, domestic tourists' overnight stays in the country, jumped by almost 155% compared to last year, so that in total tourist overnight stays dropped only 18.5%. For the first seven months of the year of 2020, the number of domestic tourists' overnight stays rose by 1.9% to 2.6 million, while the same number for foreign tourists fell by 68.5% to 2 million. The increase of domestic tourism could be certainly explained by – not only the international travel restrictions imposed – but also the national measures that allocated some €345 million to boost it, providing citizens with tourist vouchers up to €200. Overall, Slovenian economy expects a decrease by 7.6% in 2020 compared with the growth of 2.4% in 2019.

**Spain**

In Spain, the COVID-19 economic and social impacts of still incalculable dimensions on the tourism and travel sector - directly generating around 12.7% of the country’s jobs and 12.3% of its GDP in the last years - are further worsened by the country’s high degree of dependence on international tourism. In early September, the Spanish Confederation of Business Organisations (CEOE) together with the consulting firm EY jointly presented the report “Management of the tourism crisis caused by the COVID-19 pandemic”: providing some key updated figures on the sector situation. Based on the report, the number of hotel overnight stays in Spain has fallen by 71.1% between January and July, compared to the same period last year, affecting all autonomous communities, but especially the most touristic ones. Equally, international tourist arrivals have fallen by 72.4% in the first seven months of the year, and the related spending by 72.6%. In this sense, the imposition of quarantines on return or travel restrictions to the country have generated indeed a feeling of insecurity leading to cancellations and changes to other destinations. As to the forecasts for 2020, According to the latest “Study on Tourism Demand in Spain” carried out by the consulting firm Simon-Kucher & Partners Tourism team Spain is expected to lose 54.3 million tourists in 2020, generating a total decrease of 65% or €88 billion, corresponding to 6.2% of the national GDP. From a regional perspective, the same study acknowledges that international tourism in 2019 was mainly concentrated in 6 Autonomous Communities: Catalonia (19.4M), Balearics (13.7M), Canary Islands (13.1M), Andalusia (12.1M), Valencia (9.6M), Madrid (7.6M).

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32 For more details, see: https://sobotainfo.com/comment/384091 (April 2020).
34 For more details, see: https://www.ceoe.es/es/contenido/actualidad/noticias/ceoe-y-ey-presentan-el-informe-gestion-de-la-crisis-turistica-provocada-por-la-covid-19 (September 2020).
Thus, the impact on the flow of intranational tourists has been different for each area, with Balearics being the most affected region (with a decline of -76%, corresponding to a loss of more than 10 million tourists) and Catalonia the community contributing the most to the loss (13 million tourists). This could certainly be explained by three factors: the degree of seasonality of each destination; the nationality mix of tourists in each region; the accessibility and proximity to the outbound market, since for the time being private transport is preferred and air transport avoided or limited by European tourists. These trends are confirmed by the responses provided to the IMC’s survey, acknowledging a higher drop in international visitors (and to a lower extent domestic visitors).

Annex II – Sets of Measures taken at National & Regional level in the MED Area to tackle the COVID-19 pandemic

Croatia

The Government of the Republic of Croatia implemented a set of measures directly related to the tourism sector to help tackle the impact of COVID-19 and preserve related activities. Some of them are:

- Postponement of payment of the tourist fees for economic operators and private renters;
- Grants for financing working capital and improving the liquidity of vulnerable tourism businessmen;
- Postponement of the payment of some concession fees on tourist land in the camps.

At the beginning of April 2020, the Government adopted a new package of measures to assist the economy with a view to preserving the liquidity and jobs of businesses during the coronavirus pandemic. In particular, the special support of HRK 3,250 per preserved post for March already set was raised to HRK 4,000 net for April and May and the State will assume the burden of contributions for all 3 months. In addition, companies disabled or significantly impeded will be partially or fully exempted from the tax obligations for April, May and June. The payment of VAT was also delayed.

The Ministry of Tourism also decided to amend a series of laws that should help travel agencies, hoteliers and private renters to overcome any difficulties linked the crisis. Among others, the Ministry proposed a specific amendment to the Tourism Service Provision Act for travel agencies in relation to package travel contracts terminated in special circumstances due to unrealised travels: travel agencies could offer vouchers instead of a refund, provided by an insurance policy. However, if the traveller decides to request a refund, they would have to provide this within 14 days after 180 days from the end of the special circumstances.

Cyprus

The national financial support programme set up by Cyprus to mitigate the consequences of the COVID-19 pandemic included:

Measures reinforcing the protection network of workers and vulnerable population groups

- “Special Leave” to parents who are employed in the private sector for the care of children up to 15 years old due to the suspension of classes in schools, both public and private, in nurseries and kindergartens.
- Suspended Operations Plan to all businesses that have decided to suspend their operations and all businesses that will continue their operations and will suffer losses beyond 25% of their turnover, aiming at avoiding redundancies at the same time and ensuring all affected workers receive an unemployment allowance for as long as the business will be under suspended operations.

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36 Source: https://mint.gov.hr/en (May 2020)
Support Plan for Small Businesses, amounting to €10 million, for businesses employing up to 5 people, under the condition that they keep employing their employees and have suffered a loss bigger than 25% of their turnover. The Plan foresees a subsidy of 70% of the workers’ salary.

Measures supporting enterprises, enhancing the liquidity and stimulating inland consumption

- Temporary suspension for two months of the obligation to pay VAT for the provision of liquidity to undertakings. Arrangements will be made so that the debts are paid out gradually, by 11 November 2020. It concerns companies. This measure will increase the liquidity of companies in the period in which they are expected to face a liquidity problem.
- Temporary reduction of VAT from 19% to 17% for a period of two months and from 9% to 7% for a period of three and a half months immediately after the adoption of the relevant legislation in order to strengthen citizens’ purchasing power and boost consumption.
- Support for the recovery of tourism: additional appropriations of €11 million for the implementation of actions to support tourism in Cyprus between June and September 2020; actions to boost winter tourism during the period from October 2020 to March 2021 and an emergency action plan including consultations with airlines and travel operators, financial aid for cultural institutions with the aim of strengthening domestic tourism (mountainous, rural and remote areas), promotional campaign, mainly targeted to people abroad, aimed at keeping the interest of potential visitors in visiting the country (using hashtags #staysafe #betterdays), subsidies for digitalisation for cultural and tourism institutions.

Between May and June 2020, a new support package was approved from the House of Representatives with an increase in fiscal budget, including a set of measures, of which three specifically aiming to strengthen the tourism sector: this included an incentive scheme for airline companies (€6.3 million for a period of 7 months supplementary to existing ones), the co-promotion of Cyprus as a safe destination with tourist agents (€10 million) and a reduction of VAT rate from 9% to 5% in catering, hotel, tourist accommodation sectors.

France

In France the main measures adopted apply to all companies, whatever their field of activity. According to the Ministry of Economy, the following measures were foreseen:

- Deferral of payment for social and/or fiscal taxes;
- In the most difficult situations, direct taxes rebates;
- Deferral of payment of rents, water, gas and electricity bills for the smallest companies encountering difficulties;
- €1,500 for smaller businesses, self-employed and micro-enterprises of most affected sectors by the solidarity fund financed by the State and the regions;
- Mobilization of the State to the tune of €300 billion to guarantee bank cash lines that businesses may need because of the epidemic;

- Support from the State and the Banque de France to negotiate with banks a rescheduling of bank loans;
- Maintenance and reinforcement of employment in enterprises by the simplified and reinforced partial unemployment scheme;
- Support for the handling of a dispute with customers or suppliers by the companies.

In addition, as regards some tourism specific measures, the Government introduced an important modification to the conditions for cancellation of reservations for the period 1 March to 15 September, allowing the replacement of customers’ reimbursement with a credit of an equivalent amount valid for 18 months, aiming to reduce the cash outflow of mainly impacted tourism professionals. Moreover, the French Office of the Tourism Committee (Bureau du Comité de Filière Tourisme) is expected to meet regularly to accompany de sector in these difficult circumstances.

Also, in May 2020, the Prime Minister announced that the Government would commit €18 billion to the tourism sector to support the recovery, starting with €6.2 billion of guaranteed loans granted to 50,000 companies in the sector - a €1.3 billion recovery plan funded by Caisse des Dépôts and BPI France. This will be further supplemented by additional private investments to reach a total of €7 billion.

**Corse**

Back in March 2020, Corsica mobilised €30 million as part of an emergency plan including three main components:

- Support for the strategic air transport sector and Air Corsica;
- Specific support for the tourism sector, a key sector of the island economy, particularly affected by the COVID-19 crisis;
- Support to adapt regulations to the challenges linked to the COVID-19 crisis.

In particular, with regards to the second component, the tourism agency of Corsica devoted for 2020 €3.8 million to an exceptional communication campaign aimed at preserving the Corsican destinations in the market. In addition, measures to improve the tourist offer were foreseen through the reimbursable advance system contracted with the CADEC (€1.5 M in 2020) which may further evolve in the medium term.

**Occitanie**

In addition to the national provisions, Occitanie set further measures at regional level:

- It created a single, free telephone number to answer questions from businesses and explain to them the steps to follow while addressing them to the right contact;

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- It allocated €64 million to support businesses, strengthening the massive system of €300 billion in cash guarantees announced by the Government. Thus, a business owner who needed a loan could count on BPI France to guarantee it;
- With BPI France, it also launched the Occitanie Rebound Loan scheme, a loan at 0% rate, repayments of which can be deferred for 2 years and then staggered. The loan amount, from €10,000 to €300,000, allowed a bank loan of the same amount at the same time. It was aimed at SMEs from one year of existence, to finance working capital needs (BFR), intangible expenses or even material investments with low pledge value;
- In order to protect businesses, it decided to freeze repayable advances, currently 60 million in outstanding amounts. Refunds would not be requested from companies until the end of the first half of 2020.

The Region also supported its service providers and partner companies:
- All current payments will be honoured as soon as possible. The region put in place a public service continuity plan, prioritising payments and assistance to businesses;
- No payment penalty will be requested from companies in the market with regional services in the event of delay or incomplete delivery;
- The instalments paid for postponed events will be maintained or even increased;
- All companies housed in regional buildings are exempt from rent for the next three months (business incubators, Réalis, La Cité, etc.);
- School road transport companies impacted by the suspension of liO services will be supported by the Region in order to avoid the implementation of short time working. Services not performed by regional carriers will be remunerated on all fixed charges, including salaries.

### Région Sud

Of the €250 million mobilized by the 18 Regions of France to contribute to the National State Solidarity Fund, Région Sud mobilized €35 million\(^47\). The objective was above all to help all companies get through this unprecedented health crisis. To this end, Région Sud planned:

- An initial emergency aid of €1,500 offered automatically upon simple declaration.
- A second emergency aid from €2,000 to €5,000.

Back in March 2020, Région Sud announced the launch of an Emergency, Solidarity and Recovery Plan\(^48\) alongside the State to accompany the inhabitants of its territory through this crisis:

- Faced with the emergency and the spread of the virus, the Region committed €12 million for healthcare staff.
- The Business Emergency Plan represented a budget of €65 million.
- A measure was put in place to boost the tourism industry with a dedicated €2.6 million facility.

In this context, the Regional Committee for Tourism worked – in cooperation with relevant territorial and local stakeholders (including departments, development agencies, metropolitan tourism offices, etc.) - on an ambitious plan to relaunch the tourism sector\(^49\), with a focus in particular on a strong communication campaign to promote the Region in the market as a top destination. The campaign was addressed to

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\(^{47}\) Source: [https://www.maregionsud.fr/infos-covid-19](https://www.maregionsud.fr/infos-covid-19) (October 2020)

\(^{48}\) Source: [https://www.maregionsud.fr/actualites/detail/14-md-eur-pour-le-plan-durgence-de-solidarite-et-de-relance-de-la-region-sud?fbclid=IwAR3I3BLrT3mH8Simol-F4WJvahrRKtvvJxVEHT7VDO1oYCEpCMrwvm2Z4](https://www.maregionsud.fr/actualites/detail/14-md-eur-pour-le-plan-durgence-de-solidarite-et-de-relance-de-la-region-sud?fbclid=IwAR3I3BLrT3mH8Simol-F4WJvahrRKtvvJxVEHT7VDO1oYCEpCMrwvm2Z4) (March 2020)

French customers in the short-term to be further exploited to attract potential international customers in the medium-long term.

Greece

Greece took some drastic measures against the expansion of COVID-19, including the closure of all hotels until the end of April 2020.

As for the initial measures to support the tourism sector, these included:

- Suspension of VAT (payable at the end of March) and social security contributions for four months in order to support businesses and regions where the state introduced freezing of economic activity for more than 10 days;
- Suspension of payment of certified debts to Public Fiscal Services (“Public Financial Offices”), as well as of instalments for the settlement of debts, payable at the end of March 2020, for 4 months respectively in sectors and areas where companies had shut down on the Government’s orders for at least 10 days;
- Respective measures for all social security contributions and tranche payments to social security funds;
- Establishment of a monitoring mechanism, based on the available data derived from the Independent Public Revenue Authority (AADE), the available data of banks regarding electronic transactions and the Ministry of Labour regarding the number of employees and social security contributions in order to intervene in a timely, targeted and effective manner in the economic sectors and areas where there was a considerable slowdown in the economic activity;
- Unemployment cards of tourism employees, that already expired within the last three months, remained valid until May 2020;
- An allowance of €800 was granted to tourism employees, freelancers and self-employed.

The Ministry of Tourism also monitored the developments, recorded the problems, informed the operators of the sector and elaborated measures and proposals to support the Greek tourism market in coordination with the National Tourism Organisation, the competent services and the private tourism sector. In this light, it set up a Crisis Management Committee for Coronavirus:

- firstly, it provided up to date information to the tourism market for developments;
- secondly, it drew up a plan for the internal organisation of the Ministry in order to continue its operation;
- thirdly, it elaborated a package of measures to stimulate the market in the short run and the long run, taking also into account proposals from the private tourism sector;
- fourthly, it set up a programme to promote the Country as a safe destination when conditions are deemed appropriate;
- fifth, it planned how to recover in the international market;
- sixth, it participated in initiatives to provide a coordinated confrontation to the effects of coronavirus at European and international levels. An Open Communication Line for tourism operators, businesses and market representatives with the Ministry of Tourism to address emerging issues was also created.

Italy

Italy adopted an initial emergency decree worth €25 billion to rescue national economy from coronavirus crisis. The decree provided €3.5 billion to help health services and €10 billion to support families and workers. Some of the specific measures\(^\text{51}\) established that:

- Families could apply for permission to suspend their mortgage payments if business shutdowns caused by the pandemic threaten their livelihoods;
- Self-employed or seasonal workers (including \textit{tourism seasonal workers}) could apply for a special pay-out of €600 in March;
- Parents could claim up to €600 to pay for babysitting;
- Parental leave was extended to 15 days;
- In March and April, people caring for a loved one with disabilities were entitled to take up to 12 days' leave a month instead of three;
- Employees could claim time under quarantine as sick leave.

Specific measures aiming at supporting \textit{tourism and culture}\(^\text{52}\) were also introduced by the Italian Government, including:

- Introduction of extraordinary allowance for tourism and culture workers;
- Extension of social security benefits to seasonal workers in tourism and entertainment;
- Suspension of withholding tax payments, social security and welfare contributions, compulsory insurance premiums to support culture, entertainment and tourism businesses (hotels, agencies and tour operators);
- Possibility of replacing direct refunds with vouchers for trips, tourist packages and hotel bookings, as well as for cinema, theatre, museum and concert tickets;
- Preparation of extraordinary campaign to relaunch the image of Italy in the world;
- Launch of an Emergency fund (€130 million for 2020) for performing arts and cinema.

With the aim of helping the \textit{national tourism sector} heavily affected by the pandemic, the government then included specific measures in the May decree, for a total amount of approximately €4 billion. The so-called “Relaunch” decree\(^\text{53}\) launched the “2020 holiday bonus”, an ad-hoc fund for the promotion of tourism in Italy as well as the cancellation of the first IMU (single municipal tax) instalment for hotels and tourist establishments. In particular, the 2020 holiday bonus was made available for families with total incomes lower that €40,000, as a voucher of up to €500, to be spent from 1 July to 31 December 2020. Following the “Relaunch” decree, in the recent months a National Tourism Fund\(^\text{54}\), an initiative promoted by Cassa Depositi e Prestiti (CDP), was set up to mobilise €2 billion to help Italian tourist facilities and properties. In particular, the funds came partly from CDP’s resources (€750 million) and partly through third-party investor funds. The Ministry of Cultural Heritage and Activities and Tourism is also expected to contribute up to €150 million through funds set up by the Relaunch decree.

In parallel, some regions adopted further measures to support the sector.\(^\text{55}\)

\(^\text{51}\) Source: \url{https://quifinanza.it/soldi/decreto-cur-italia-ce-lok-25-miliardi-di-euro-per-famiglie-e-aziende/361761/} (March 2020)
\(^\text{52}\) Source: \url{https://www.beniculturali.it} (April 2020)
\(^\text{53}\) Source: \url{https://www.fasi.biz/it/notizie/novita/21885-bonus-vacanze-fondo-turismo-decreto-rilancio.html} (May 2020)
\(^\text{54}\) Source: \url{https://www.fasi.biz/it/notizie/in-evidenza/22612-cdp-fondo-nazionale-turismo.html} (September 2020)
## Abruzzo

At the beginning of April 2020, the region modified the first level control procedures in relation to FSC funds 2007-13 and 2014-20 to ensure liquidity in the economy, and it also approved a €100 million package of measures to support businesses and families who suffered damages caused by the pandemic.

## Calabria

In April 2020, the region launched the Fund “Riparti Calabria”, worth €1.5 billion to support liquidity for regional enterprises particularly damaged by the economic crisis linked to the pandemic. In recent months, it also decided to issue specific vouchers to support the tourism sector. In particular, it allocated €15 million for €320 vouchers to Calabrian families to spend their holidays in the region, and €12.5 million for €200 vouchers addressed to young people to buy tourist recreational/cultural goods and services offered by facilities of the territory.

## Campania

During the first months of the COVID-19 outbreak, the region launched a €604 million plan to face the wide range of socio-economic effects of the crisis caused by the pandemic, targeting both citizens and enterprises. This plan also included specific measures to support the tourism sector, with an allocation of €30 million for seasonal workers. In addition, in September 2020, the region supported the re-launch and repositioning of regional tourist brokerage agents, through a specific call worth €2 million aimed at innovative projects.

## Emilia Romagna

In early April 2020, the region approved a package of measures worth €320 million to support businesses, families and workers. This included measures to support the health care system, the sanitation needs for hotels and tourist accommodations, the cultural sector, sport associations, digitalisation needs for schools and training centres, the welfare and the agricultural sector.

## Lazio

In May 2020, the region signed an agreement with Cassa depositi e prestiti (CDP) to increase from €51 to €375 million the funds of the call “Pronto Cassa” for the first small credits to regional businesses during the COVID-19 emergency. Then, some months later, to support the economy in this crisis, the region reprogrammed around €640 million, corresponding to the unspent amount of EU funds to be used to help

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58 Source: [http://calabriaeuropa.regione.calabria.it/website/bando/404/staincalabria.html](http://calabriaeuropa.regione.calabria.it/website/bando/404/staincalabria.html) (June 2020)
59 Source: [http://calabriaeuropa.regione.calabria.it/website/bando/405/incalabria.html](http://calabriaeuropa.regione.calabria.it/website/bando/405/incalabria.html) (June 2020)
63 Source: [https://www.regione.lazio.it/rl_main/?vw=newsDettaglio&id=5551](https://www.regione.lazio.it/rl_main/?vw=newsDettaglio&id=5551) (May 2020)
the health, education and training sectors but also general economic activities, labour and social needs. Finally, a total of €10 million to provide non-repayable grants ranging from €600 to €8,000 was allocated by the region to support the liquidity of hotels, tourist agencies and other facilities, through three different calls until the end of September 2020.

Liguria

At the early stage of the COVID-19 pandemic, the region approved a package of measures including €5.5 million that were used for a Guarantee Fund for micro and small businesses in tourism, commerce and craft, a specific revolving fund of €700,000 for loans for itinerant trade companies as well as two revolving funds - one for culture and one for sport of €500,000 each. In May 2020, specific instruments to support businesses were also set up by the region, that allocated in particular €1.5 for the “We Start Up” Fund and €14.5 to support operations aiming at reinforcing the economic-financial and sustainability of MSMEs. Later, in August 2020, the region finally published different calls to support citizens and businesses of its territory, in facing the negative effects of the pandemic, with a focus on digitalisation and sanitization for SMEs.

Marche

In July 2020 the region allocated around €17 million to support tourism operators through non-repayable grants for accommodation facilities and holiday vouchers for regional tourists spending at least two nights in regional accommodations. This amount was part of the €210 million allocation, foreseen by the regional law 20-2020 to respond to the negative effects caused by the pandemic, which also included €39 million to support trade, labour market and education as well as €514,000 for the publishing and information industry.

Puglia

As urgent measures, in March 2020 the region already planned specific actions to support culture, entertainment and tourism sectors. This package included, among others, the postponement of formalities or extension for the implementation of funded actions and investments in relation to various calls in the field, as well as the procedural simplification, optimization and acceleration for those calls. The region also decided to suspend up to six months the loans granted by the regional administration (through Puglia Development) in relation to the instruments: "NIDI", "Tecnonidi", "Microcredit" and the Fund for networks' internationalisation. In addition, companies could also request to postpone twelve months later the monitoring on the obligations following the end investments co-financed by the region in relation to some specific measures: " Programme Contracts " P.I.A. small businesses ", " P.I.A. medium businesses " P.I.A. Tourism". Back in May 2020, the region then decided to dedicate a total of €750 million to help face the effects of the pandemic, by reprogramming ERDF resources: this also included a specific support

64 Source: [https://www.regione.lazio.it/rl_main/?vw=newsDettaglio&id=5658](https://www.regione.lazio.it/rl_main/?vw=newsDettaglio&id=5658) (July 2020)
65 Source: [http://www.regione.lazio.it/rl_main/?vw=newsdettaglio&id=5762](http://www.regione.lazio.it/rl_main/?vw=newsdettaglio&id=5762) (September 2020)
67 Source: [https://www.ligurcapital.it/gestione-fondi/misure-aperte.html](https://www.ligurcapital.it/gestione-fondi/misure-aperte.html) (May 2020)
68 Source: [https://www.ternotum.com/2020/05/13/20200513-economia](https://www.ternotum.com/2020/05/13/20200513-economia) (May 2020)
69 Source: [https://por.regione.puglia.it/-/cultura-misure-covid-2019](https://por.regione.puglia.it/-/cultura-misure-covid-2019) (March 2020)
70 Source: [https://por.regione.puglia.it/-/misure-sostegno-attivita-economiche-covid-19](https://por.regione.puglia.it/-/misure-sostegno-attivita-economiche-covid-19) (June 2020)
to regional businesses: €50 million to tourism businesses and €150 million to the rest of businesses.

Finally, between June and July 2020, the region launched a number of initiatives to further support its citizens and businesses in facing the difficulties caused by the pandemic: it allocated €31 million to provide an income supplement of €500 to the most disadvantaged citizens as well as €124 million through a specific programme called “START” to help self-employed workers and professionals.

### Sardegna

During the month of July 2020, the region launched a specific call for economic aid to urgently support employment in the tourism sector for 2020 and help regional businesses to face the COVID-19 generated crisis. In particular, the support intended to promote the employability of young people (under 35) and unemployed or women (over 35).

### Sicilia

In March 2020, the region launched a call for managing the funds for the so-called “Tranched Cover” operations of over €25 million, amount coming from the previous European programming to provide guarantees for access to bank credit of over €250 million of loans for SMEs. This measure added to the resources already allocated to the Central Guarantee Fund (€102 million, that were increased by a further €100 million and which guarantee 80% of bank loans for businesses), which would allow to finance 20 thousand companies with over €2 billion of liquid resources to be placed on the market.

The region and ABI (Associazione Bancaria Italiana) also agreed to start a moratorium on mortgages contracted with the banking system before 31 January 2020:

- All monthly instalments for all medium and long-term mortgages (including real estate leasing) will be suspended, avoiding the payment for one year;
- The debt up to 100% of the residual duration of the amortization will be extended, with a consequent halving of the instalment amount and the release of liquidity.

### Toscana

In September 2020, the region launched a call for direct aid (worth €1 million) specifically targeting tourism MSMEs to help them overcome the difficulties caused by the COVID-19 outbreak.

### Veneto

Between the months of May and July 2020, the region initially provided SMEs with €30 million to support liquidity during the emergency and published a €10 million call for proposals granting incentives for the employment of young people and the stabilisation of employees in regional SMEs, particularly affected by

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75 Source: https://www.regione.sardegna.it/j/i/25687s=411559&v=2&c=3&t=1 (July 2020)
76 Source: https://www.ilsole24ore.com/art/un-piano-250-milioni-le-pmi-siciliane-AD0ntFE (March 2020)
77 Source: https://www.abi.it/DOC_Info/ABI-News/ABI-News/Aprile%202020.pdf (April 2020)
78 Source: https://www.regione.toscana.it/-/porfesr-contributi-fondo-perduto-filiera-del-turismo (October 2020)
79 Source: https://www.regione.veneto.it/article-detail?articleId=4725456 (May 2020)
the pandemic\(^{80}\). In addition, in September it decided to further support SMEs damaged by the economic crisis, through the launch of a rotation fund called “Anticrisi attività produttive” worth €60 million that will be running until the end of 2021\(^{81}\). A specific allocation of €3 million for the relaunch of tourism in the region was also introduced for training bodies to fund projects for tourism operators aimed at adapting tourism services and products (“Ri-partiamo” Programme\(^{82}\)).

Malta

In May 2020, the Government of Malta rolled out some benefits which aimed to help the tourism sector, particularly the SMEs and self-employed. The measures announced had a value of around €1.8 billion, which represented around 12.9% of Malta’s Gross Domestic Product (GDP) in 2019. A summary of the announced financial aid package and measures introduced\(^{83}\) in light of COVID-19 is set out below.

General economic measures:

- Liquidity injection and bank guarantees of up to €1.6bn consisting of:
  - Deferral of tax payments as previously announced (resulting in expected deferred tax payments estimated at between €400m and €700m)
  - €150m of bank guarantees
  - €750m of soft loans
- Possibility of requesting a three-month moratorium for both personal and business loans.
- Provision of guarantees by the Government of up to €900m thereby making credit of €4.5bn available.
- €210m of funds (equal to 1.5% of Malta’s GDP in 2019) were made available to cover expenditure resulting from COVID-19.
- An additional €35m were added to the health budget to fund additional expenditure necessary for acquiring health related equipment and supplies required to fight COVID-19. Government also committed to increase this amount should this become necessary.

Measures linked to employment:

- A grant of €350 per employee to businesses that had employees on mandatory quarantine.
- Employees of enterprises that suffered from a complete suspension of operations (e.g. accommodation, food and beverage, language schools and entertainment) were entitled to a grant of 2 days’ salary per week (based on a monthly salary of €800).
- Self-employed individuals operating in the said industries also could receive a grant equivalent to two days’ salary per week (based on an assumed monthly salary of €800). Those self-employed individuals having their own employees could receive a grant equivalent to three days’ salary per week (based on an assumed monthly salary of €800).
- Where the operations of a business reduced by at least 25%, employees could benefit from a grant equivalent to 1 day’s salary per week (based on a monthly salary of €800).
- Individuals whose full-time employment was terminated with effect from 9th March 2020 would benefit from a temporary increase in unemployment benefit of up to €800 monthly.
- New measures linked to employment of third-country nationals:

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\(^{80}\) Source: [https://www.regione.veneto.it/web/lavoro/2020/933/incentivi-giovani-covid-19](https://www.regione.veneto.it/web/lavoro/2020/933/incentivi-giovani-covid-19) (July 2020)

\(^{81}\) Source: [https://www.regione.veneto.it/article-detail?articled=5397459](https://www.regione.veneto.it/article-detail?articled=5397459) (September 2020)

\(^{82}\) Source: [https://www.regione.veneto.it/ri-partiamo](https://www.regione.veneto.it/ri-partiamo) (September 2020)

All enterprises terminating active employment contracts would be denied the possibility of recruiting third-country nationals; Going forward only applications for highly-skilled third-country workers would be considered; In case of job termination, assistance would be provided to all third-country nationals to find alternative employment.

New service offering by Jobsplus to provide assistance to:
- Individuals who are resident in Malta and whose job was terminated;
- Third-country nationals whose employment was terminated. Assistance would also be provided in connection with work permit queries;
- Employers to seek new recruits.

Other social measures:
- €800 Government benefit per month (for up to 2 months) for families with school-aged children where both parents worked in the private sector and were unable to work remotely and who required additional leave to take care of the children.
- Persons with disabilities were particularly vulnerable to COVID-19 and had to stop working following the outbreak. If such individuals were unable to work from home, they would be entitled to a benefit of €800 monthly for a specified period.
- Rent subsidies by the Government would increase where a family member living in subsidised accommodation had his/her employment terminated.

During the first months of the pandemic, the following measures were adopted by the Government of Montenegro to support the national economy:

- Postponement of repayment of loans at the request of citizens and economy with all banks, micro-credit institutions and the Investment and Development Fund for 90 days.
- Postponement of payment of taxes and contributions on earnings as well as obligations under the Law on Rescheduling of Tax Claim.
- Creation of a new IRF credit line intended to improve the liquidity of entrepreneurs, micro, small, medium-sized and large enterprises up to a maximum amount of €3 million per beneficiary, by a simplified procedure, no approval fee and an interest rate of only 1.5%. These funds were intended for companies operating in the field of procurement of medicine, medical equipment and vehicles, tourism and catering, traffic, services, food production and processing.
- Provision of one-off financial assistance to the pensioners with the lowest pensions and beneficiaries of material assistance in the amount of €50 each. To this end, the Government allocated €1 million.
- Postponement of payment of lease of state-owned real estate, also for a period of 90 days.
- Suspension of payment of variable pay and all budgetary allowances for work in commissions, steering committees and other working bodies. The state administration suspended these payments and the recommendation for local governments was to do the same.

▪ Cabinet members would allocate one-off payment in the amount of the half of their salaries to the account of the National Coordination Body for Communicable Diseases.
▪ Restriction and control of budget spending, with the prohibition of initiating all public procurement except those necessary for the functioning of the health system, that is, urgent procurement, in accordance with the provisions of the law.
▪ It was forbidden for budget users to make donor payments. The budget was unique and its function was to preserve the health of citizens and ensure the functioning of the state. Receiving donations to any health and state-owned institution was forbidden, considering there is the National Communication Body and a single account for these purposes.
▪ Advance payment to service providers and contractors on started capital projects with the provision of a bank guarantee in the value of advance payment to ensure their liquidity and maintain continuity of works, where this did not endanger the health of citizens. The started capital projects would not be stopped because they were considered crucial to the development and faster recovery of economy and standards.
▪ All measures related to the liquidity of the economy also applied to entities that are founders of Montenegrin media.

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**Portugal**

Already back in March, Turismo de Portugal\(^{85}\), the national tourism board integrated within the Ministry of Economy of the Portuguese Republic, informed that, to help enterprises affected by the economic fallout of the COVID-19 pandemic, the following mechanisms were set up:

Creation of a COVID-19 help line for the Treasury of microenterprises in the tourism sector

This was a new credit line, with a budget of €60 million, created for microenterprises unable to overcome economically the reduction in the demand experienced.

Turismo de Portugal Schools - Supporting enterprises operational areas

Turismo de Portugal created a specialized online support centre, handled by a team of 60 teachers from their Hospitality and Tourism Schools, to help companies find the appropriate measures for each business area and verify their implementation, thus reducing the negative impact of COVID-19.

Government measures that also apply for the tourism sector

The national Government approved several credits, available through the banking system and guaranteed by the Portuguese Republic, for enterprises of the hardest hit activities, such as:

▪ Restaurants, bars and others alike | €600 million – €270 million exclusively for micro or small enterprises.
▪ Travel agencies; tourism entertainment companies; event producers and related | €200 million – €75 million only for micro or small enterprises.
▪ Tourist housing and resorts | €900 million – €300 million dedicated to micro and small enterprises.
▪ The abovementioned credits have a payment deadline of 4 years.

Fiscal policies

All the delays were postponed, and payments could be fractioned (flexible payment regime).

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\(^{85}\) Source: [http://www.turismodeportugal.pt](http://www.turismodeportugal.pt) (March 2020)
**Credit moratorium**

The Portuguese Government implemented a credit moratorium lasting for 6 months, until September 2020, for loans essential for normal activities of enterprises and on housing credits for citizens.

**Employment and activity**

The Portuguese Government approved a simplified lay-off plan.

**Easier access to lay-off**

Enterprises forced to shut down by public authorities; closed due to lack of demand or those that, despite maintaining their production, had a significant reduction of their revenue and thus had to adapt their operations to this new reality were all eligible for COVID-19 special economic measures. These enterprises were guaranteed access to social security benefits for their workers during the implementation of national Contingency Plans to contain the outbreak of COVID-19 disease. The special financial support given to enterprises, and calculated per employee, was set up to help them pay for their workers’ salaries during periods of temporary reduction of working hours or the suspension of employment contracts.

**OpenRooms.Portugal.com**

This online platform comprised several hotels, all over the country, that provided, free of charge, rooms for health care professionals who needed them during this crisis. Turismo de Portugal joined this program offering health care professionals 23 rooms in the School of Hospitality and Tourism of Setubal, 12 in the Algarve, 7 in Lamego and 1 in Coimbra.

**TRAVELBI**

Updated market information, gathered by teams abroad, was available once a week for all sectorial institutions and companies.

**VisitPortugal**

Turismo de Portugal adapted and simplified the VisitPortugal website information to new reality of the COVID-19 pandemic, transforming this page in a Portugal Tourism Response for tourists considering a trip to Portugal and those already in Portugal.

**Actions taken by the Turismo de Portugal Training Department to reduce the negative impact of the COVID-19 Contingency Plans and to guarantee the same learning conditions for all students:**

- All students had virtual classes using Office 365 tools, such as Teams, or any other analogous software selected by the teachers.
- Lessons were synchronised, like in a standard classroom, with everyone online at the same time or separate, the teacher gave students homework, challenges, tests and each one of them did it alone and then reported back to the professor. Classes, on average, lasted 5 hours per day.
- Most virtual courses were theoretical but there were few practical classes like PE (Physical Education).
- Students with difficult or no access to computers and/or internet connection had a teacher designated to help them overcome this situation and to give them the same classes by other means.
- Schools developed new curricular activities meant to help in an environment of social isolation and uncertainty:
  - Technical support to take more advantage of the new virtual learning tools
  - Educational and psychological assistance for students during this crisis
  - Complementary sessions and bonuses, such as: Hospitality&Tourism online talks, sharing educational material, newsletters with ideas of physical exercises, family activities, etc.
- During online classes the school insurance upheld the same conditions as before.
▪ The Turismo de Portugal Training Department guaranteed that students with mandatory exams to be held during this period could pass them remotely.
▪ During the implementation of COVID-19 Contingency Plans in the country, the Turismo de Portugal Training Department put in place measures to ease the financial pressure students deal with, such as:
  o The immediate exemption of tuitions for all students. Those who had already paid tuitions for the month of March would be reimbursed.
  o Reimbursement of public transportation used during the month of March.
  o Help for students with economic woes pay for their accommodation, just like it was already done before the crisis.
  o Payment of food allowances to students receiving social welfares.
  o A daily food allowance for every online school day.
▪ For some students without computer, the school loaned one during this period.
▪ Schools negotiated with operators free Wi-Fi for isolated students.

Slovenia

A large legislative package was adopted by the Slovenian Parliament at the very first stage of the pandemic outbreak, back in May. In addition to addressing public health and social issues, the package was intended to mitigate negative consequences of the pandemic on the business sector in general. The specific goals of the proposed measures were to preserve jobs and keep businesses in operation as well as ensuring the liquidity of economic operators.

Some of the key measures⁶⁶ are listed here below:
▪ Companies were allowed to ask for tax deferrals for up to 24 months or tax payments in instalments in 24 months;
▪ Wage subsidies were given for suspended workers due to pandemic-related closures and quarantined people (laid-off workers entitled to 80% of their wage average from the past three months, with the employers having to cover 60% of this sum and the state 40%);
▪ Government guarantees and credit lines were made available for financial support to the affected businesses, particularly SME:
  o lines of credit at the SID Bank, the Slovenian Enterprise Fund and the Slovenian Regional Development Fund;
  o state guarantees through SID Bank and special-purpose funds so that commercial banks could help the population and businesses with borrowing and loan repayment;
▪ Bank Assets Management Company were allowed to buy non-performing loans;
▪ All ECB measures were extended to all banks and savings banks in Slovenia;
▪ Emergency assistance was provided to the self-employed (self-employed workers who were unable to do their business were eligible to receive up to 70% of Slovenia’s minimum net monthly salary);
▪ The Government issued a decree to reduce electricity prices by about 20% for three months to ease the impact of the pandemic;
▪ Money from cohesion funds were diverted to where the money was needed more;
▪ State aid was provided in the field of tourism promotion – co-financing of tourism promotion – and in the field of internationalisation of business.

Spain

Spain adopted several measures with the aim of alleviating the impact of the coronavirus crisis. In particular, different comprehensive packages of fiscal/economic measures were approved between March and April, in view of promoting liquidity in the economy. These measures included, among other increased flexibility of tax deferrals in 2020, partial exemption from employer’s social security contributions, guarantees lines, improved protection for workers to avoid redundancy.

As for tourism, the Government initially enabled an ICO (Official Credit Institute) line of loans €400 million to help companies in the tourism, transport and accommodation sector. According to the conditions of the financing line, companies could request up to €500,000 to overcome the economic effects unleashed by the crisis and have sufficient liquidity to continue operating. The following banks adhered to this plan: Santander, BBVA, CaixaBank, Cajamar, Bankinter, Caja Rural de Teruel and Liberbank. The maximum rate of these loans was set at 1.5% including commissions and the repayment period ranged from one to four years, with the possibility of non-payment of twelve months for the amount of the principal. The guarantee was placed at 50%, which was the percentage that the Government intended to set in its guarantee package for up to €100,000 million for SMEs and the self-employed who were affected by the coronavirus.

In June 2020, the Government also presented a new strategic plan for tourism, worth more than €4,262 million and consisting of 28 measures dealing with the recovery of confidence in the destination, the reactivation of the sector, the improvement of competitiveness and tourism knowledge/intelligence and finally the promotion of the country.

Andalucía

The Ministry of Tourism of Andalusia developed three possible scenarios on the development of tourism in 2020, given to the COVID-19 pandemic and worked on a new tourism promotion action plan after the COVID-19, with the intention of helping to reactivate the Andalusian tourist activity and relaunching its position as destination in the national and international markets as soon as possible. In this sense, the Public Company for the Management of Tourism and Sports of Andalusia studied new measures to be developed to support the tourism sector and employment, as well as to attract clients from the main markets.

In addition, the Ministry of Tourism launched a digital campaign to continue promoting the image of Andalusia as destination during the confinement, stressing that the community will get back to a regular situation once the emergency will be over. In its social networks’ profile, further actions were carried out, aimed at the main foreign markets, such as the UK, Germany, France and Italy.

As to professionals working in the sector, specific content was made available, in particular in relation to teleworking tools/techniques as well as updates on the information, in addition to offering help and

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89 Source: [https://www.lamoncloa.gob.es/presidente/actividades/Paginas/2020/180620-sanchezturismo.aspx](https://www.lamoncloa.gob.es/presidente/actividades/Paginas/2020/180620-sanchezturismo.aspx) (June 2020)
assistance to Andalusian businessmen. In this context, Andalucía Lab\textsuperscript{91}, the tourism innovation centre of the Region launched a series of initiatives to continue its consulting and training offer to companies and professionals in the sector during the period of inactivity. More than a thousand applications were received to participate in these online activities.

### Cataluña

In the first months of the pandemic, the Department of Business and Knowledge of the Generalitat of Catalonia approved direct aid for a total of €3.5 million for tourist micro-enterprises\textsuperscript{92} that were affected by the COVID-19 pandemic, through which beneficiaries would be able to receive up to €2,500 in a single advance payment. Beneficiaries could be tourist accommodation establishments, tourist guides, mediation tourism companies, establishments and activities of tourist interest with a maximum of five workers and up to a maximum of €500,000 in annual turnover. In particular, this programme was designed for companies that, due to their smaller structure, had more limited access to other lines of aid and could cover rentals, loan or mortgage instalments, suppliers, basic services, supplies, salaries, etc. Another €1.5 million was then allocated to the same programme in June 2020\textsuperscript{92}. In the same month, a dedicated budget line worth €8.5 euro was also set up for authorised guides of Catalonia, owners of tourist accommodations, tourism operators and travel agencies\textsuperscript{93}.

In parallel, the Department of Economy and Finance placed a temporary moratorium\textsuperscript{94} on the payment of the tax on stays in tourism establishments, which companies were supposed to pay in April.

### Valencia

The Tourism Department of the Generalitat of Valencia promoted multidisciplinary actions\textsuperscript{95}, taking a number of important measures to help the tourism sector face the current COVID-19 pandemic consequences:

- It reinforced informative and training content of its online offer, while maintaining promotion and awareness campaigns through social networks.
- It issued basic recommendations to tourism companies to try to mitigate the impact of the crisis caused by the expansion of the virus in the sector.
- It promoted a contingency plan for the SICTED (Sistema Integral de Calidad Turística en Destino) programme of the region, to help plan the strategy to follow when the emergency situation will be over. This plan included an axis of training, another of technical assistance, as well as the creation of working groups to improve the communication of the programme action.
- It created a venture capital fund of the Valencia Institute of Finance to boost the growth of companies, worth €200 million. Its purpose was to invest in the capital of companies of medium and large size, based in the territory, and with the capacity to boost economic activity. This credit for micro-SMEs and self-employed was granted at 0% interest to be used for liquidity. Possibilities for splitting, postponing or subsidizing regional taxes were enabled and a line of €800,000 was

\begin{itemize}
  \item [92] Source: https://web.gencat.cat/es/details/article/ampliacio-linia-ajuts-professionals-micropimes (June 2020)
  \item [93] Source: https://govern.cat/salapremsa/notes-premsa/385860/publicades-condicions-accedir-nova-linia-85m-euros-suport-al-sector-turistic (June 2020)
  \item [95] Source: http://www.turisme.gva.es/opencms/opencms/turisme/es/index.jsp (April 2020)
\end{itemize}
created for companies to establish technical measures for teleworking and technological modernization.
Annex III – Survey responses

The CPMR Intermediterranean Commission’s survey was sent late summer to about 40 Regional authorities throughout the Mediterranean basin, from both EU and non-EU countries. The idea was to obtain updated information about the situation on the Intermediterranean Commission’s territories regarding the impacts of the COVID-19 pandemic, and notably on the tourism sector as the Summer season came close to an end.

13 responses were received, which, given the length of the survey, gives already some interesting orientations as to understand the current situations in the responding Regions’ territories. Nonetheless, all results are to be considered with some perspective, as the latest studies and numbers about 2020 have still not been published or updated.

These annexes are available in a dedicated folder to be downloaded or consulted via the following link:

Annex IV – EU programmes and initiatives addressing the tourism sector

At EU level no specific funded Programme is currently addressing exclusively Tourism, as it is the case for other key topics, such as research, SMSs, environment, etc. Yet, in the last years, Tourism has been often transversally introduced as a priority in dedicated calls for proposals, funded by different EU Programmes (e.g. Horizon 2020, COSME, Life).

Horizon 2020

With nearly €80 billion of funding available over 7 years (2014 to 2020), Horizon 2020 is the EU’s funding programme for research innovation. In the framework of its work programme, under the specific objective of the Societal Challenge “Europe in a changing world – Inclusive, innovative and reflective societies” (SC6), two calls for projects “Innovative approaches to urban and regional development through cultural tourism” were launched between 2018 and 2019. In addition, other H2020 projects dealing with tourism were funded over the years, of which some were implemented in the Mediterranean area. By way of example:

- **EuroMED Cooperation. Inland and Marine Water Challenges** (2014) which supported the organization of the Italian Presidency public event emphasizing Mediterranean cooperation on research and innovation and designed as a conference embracing political debate for the identification of challenges to advance R&I to sustain economic growth and EuroMED cooperation.
- **Search engine for organising complete collaborative economy experiences** (2017). It aimed at tackling the several challenges brought by sharing economy platforms and services towards European businesses, by providing an innovative business model to aggregate in one single platform all the third-party services demanded by the consumers.

COSME

COSME seeks to foster competitiveness among the EU SMEs, reducing their administrative and regulatory burden to create a business-friendly environment and encouraging the adoption of new business models and innovative practices. This complements particularly actions in areas with high growth potential, such as the tourism sector. Indeed, in 2014 and 205 the Programme launched specific calls for projects aiming at “Diversifying the EU Tourism Offer and Products” and “Supporting Competitive and Sustainable Growth in the Tourism Sector”. Some examples of projects funded by these calls and implemented in the Mediterranean area are the following:

- **The Heritage of Olive Tree for Sustainable Tourism (HOST)** (2015-2016), which focused on the development of a transnational tourism product based on sport activities in a rural environment in Italy, Greece, Slovenia and Montenegro. It created and promoted the “Virtual Transnational Route of Olive Tree”, a brand-new thematic itinerary to contribute to the sustainable revitalization of local rural economies with positive impact on population resilience and on natural and cultural heritage conservation. Guidelines for destination management have been also issued by the project;
- **FRIENDLY BEACH** (2017), which constituted a second phase of an Italian project whose objective was to elaborate tools in order for families of autistic persons to be able to go on vacation. FRIENDLY BEACH intended to codify and assess a methodology and a model to be extended and
implemented firstly around the selected Mediterranean countries (Italy, Croatia and Spain) and later in other EU countries.

**LIFE**

The LIFE Programme is the main EU’s funding instrument for the environment and climate action. Two examples of LIFE projects dealing with sustainable tourism in the Mediterranean area could be:

- **Sustainable Cruise**, which aimed to demonstrate the potential for waste prevention, recovery and recycling on a cruise ship;
- **CARBONTOUR** whose objective was to develop an integrated methodology for measuring CO2 equivalent emissions from tourism accommodation facilities, and to strategically plan mitigation measures in the Northern Aegean islands and Cyprus.

Being the world’s leading destination with more than 300 million tourists per year (which puts a lot of pressure on ecosystems and territorial stakeholders), the Mediterranean faces the need to join efforts for an improved sustainable (coastal, maritime and cultural) tourism, with ecosystem-based management plans and evidence-based policies. A variety of relevant programmes & initiatives address this issue through specific dedicated priority actions or strategies.

**Interreg Mediterranean Programme 2014-2020**

Sustainable Tourism represents a key priority for the Interreg Programme: with this common objective, 17 Modular Projects (MPs) are implemented under the **Interreg Med Sustainable Tourism Community**, which has been developing the common Declaration of Athens, signed in October 2017 and defining four main objectives to be achieved by the end of 2019. Furthermore, particular attention is paid to M&C Tourism through two strategic projects in relation to this topic launched in September 2019 under a specific **PANORAMED** (Axis 4 - Governance) call:

- **Specific objective 3.1**: To enhance the development of a sustainable and responsible costal and maritime tourism in the MED area
- **Specific objective 4.1**: To support the process of strengthening and developing multilateral coordination frameworks in the Mediterranean for joint responses to common challenges.

The results of 17 Interreg MED projects on sustainable tourism led to the elaboration of 4 factsheets:

- **Promoting alternative tourism models to reduce pressures in the Mediterranean region**
- **Tourism as a strategic driver for inclusive, responsible and sustainable growth in the Mediterranean region**
- **Ensuring an effective monitoring of tourism sustainability in the Mediterranean region**
- **Governance as a tool for sustainable and responsible tourism in the Mediterranean region**.

**ENI CBC MED Programme 2014-2020**

The Programme seeks to tackle common challenges between 14 Mediterranean EU and Partner countries of the Mediterranean area in view of fostering fair, equitable and sustainable development on both sides of the EU’s external borders.

**Thematic Objective A.1**: Business & SMEs development
**Priority 1.2:** Strengthen and support euro-Mediterranean networks, clusters, consortia and value-chains in traditional and non-traditional sectors (6 projects selected: FISH MED NET, MedArtSal, MedSNAIL, ORGANIC ECOSYSTEM, SME4SMARTCITIES, TEX-MED ALLIANCES)

**Priority 1.3:** Encourage sustainable tourism initiatives and actions aimed at diversifying into new segments and niches (4 projects selected: CROSSDEV, MED GAIMS, Med Pearls, MEDUSA).

**ADRION Programme 2014-2020**

ADRION covers eight Partner States, of which four are EU Member States (Croatia, Greece, Italy and Slovenia), three are candidate countries (Albania, Montenegro, Serbia) and one is a potential candidate country (Bosnia and Herzegovina). The geographical area of each Partner State covers its national territory except for Italy, where programme area covers 12 regions and 2 provinces.

**Priority Axis 1:** Innovative and smart region (14 projects selected in the 1st call for proposals)

**Specific objective 1:** Support the development of a regional Innovation system for the Adriatic-Ionian Area

**Priority axis 2:** Sustainable region (10 projects selected in the 1st call for proposals)

**Specific objective 1:** Promote the sustainable valorisation and preservation of natural and cultural heritage as growth assets in the Adriatic-Ionian area (12 projects selected in the 2nd call for proposals)

**Specific objective 2:** Enhance the capacity in trans-nationally tackling environmental vulnerability, fragmentation and the safeguarding of ecosystem services in the Adriatic Ionian area (9 projects selected in the 2nd call for proposals)

**Western Mediterranean Blue Economy Initiative**

Several key actions and projects, where Mediterranean regions and West Mediterranean stakeholders are directly involved, have been identified and endorsed by the Initiative. In particular, the WestMED Assistance Mechanism endorsed two project proposals also developed by the Intermediterranean Commission, including the current ongoing project DESTIMED+.

**Goal 2:** A smart and resilient blue economy.

**Priorities 2.4:** Sustainable consumption and production (maritime transport, ports, maritime and costal tourism, marine aquaculture).
Annex V – Relevant CPMR Intermediterranean Commission ongoing projects

Projects in which the Intermediterranean Commission participates as full partner

- **CO-EVOLVE** [concluded] – Promoting the co-evolution of human activities and natural systems for the development of sustainable coastal and maritime tourism (**Corresponding call**: Interreg MED 2014-2020 – First call). Main deliverables:
  - Transferability plan at Mediterranean scale: Results and best practices
  - Tourism Sustainability Toolkit
  - Guidelines for Tourism-driven strategic planning
  - Synthesis report on threats to sustainable tourism at Mediterranean & Synthesis on enabling factors for sustainable co-evolution in touristic areas – Mediterranean scale

- **MITOMED+** [concluded] - Models of Integrated Tourism in the MEDiterranean Plus (**Corresponding call**: Interreg MED 2014-2020 – First call). Main deliverables:
  - Final MED Maritime & Coastal tourism management model
  - Green Beach Model
  - An online common open platform on indicators

- **HERIT-DATA** - Sustainable Heritage Management towards Mass Tourism Impact thanks to a holistic use of Big and Open Data (**Corresponding call**: Interreg MED 2014-2020 – Second call). Main deliverables:
  - Tourist Flow management platform and app for tourists/visitors + front-end app for professionals
  - Model for mass tourism management

- **CIVITAS DESTINATIONS** - (**Corresponding call**: MOBILITY FOR GROWTH 2014-2015/MG-5.5a-2015 - Demonstrating and testing innovative solutions for cleaner and better urban transport and mobility). Main deliverables:
  - Transnational benchmarking of Mass Tourism impacts
  - Tourist Flow management platform and app for tourists/visitors + front-end app for professionals
  - Capacity building & study visits

- **MedCoast4BG** - Common approaches and planning tools to boost sustainable coastal and maritime tourism in the Mediterranean (**Corresponding call**: UfM labelling). Umbrella project aggregating several projects and actions of ENI CBC MED (Co-Evolve4BG), Interreg MED (Co-Evolve) and H2020 (Muses) to promote the co-evolution of human activities and natural systems in coastal areas of EU and non-EU Mediterranean countries where tourism is a major activity.
- **DESTIMED+** - Integration of tourism and conservation priorities in nine protected coastal areas in the Mediterranean region. The aim is to establish a broad Mediterranean Ecotourism Consortium, on which future planning strategies and policies supporting sustainable tourism activities in protected areas in the Mediterranean region can be based. (Corresponding call: Interreg MED 2014-2020 – Third call). Main deliverable:
  - DestiMED Ecotourism products
  - Capacity building platform
  - Med Ecotourism Consortium (MEC)

- **WinterMED** - Winter Islands Network for all year-round Tourism ExpeRience in the MEDiterranean (Corresponding call: Interreg MED 2014-2020 – Third call). Main deliverables:
  - Joint Model for all year-round tourism in Med islands destinations
  - Regional Action Plan (RAPs)

- **SMARTMED** - Empower Mediterranean for SMART Tourism (Corresponding call: Interreg MED 2014-2020 – Axis4 Strategic call). Main deliverables:
  - Sustainable Smart Tourism Business Model
  - Med tourism network platform

- **BESTMED** - Beyond European Sustainable Tourism MED Path (Corresponding call: Interreg MED 2014-2020 – Axis4 Strategic call). Main deliverables:
  - MED Network of Tourism Observatories (MED-NTO)
  - MED Sustainable Path and Cultural Routes Model (MED S&C Path)

**Projects in which the Intermediterranean Commission participates as associated partner**


- **Sustainable Tourism Community** - Facilitating the knowledge sharing and the capitalisation of results of 17 Interreg Med Modular Projects on sustainable tourism - (Corresponding call: Interreg MED 2014-2020 – Second call)

  - Tourism sustainability analysis and toolkit containing indicators to analyse the level of sustainability of tourism

- **MED PEARLS** - Med Pearls - The Mediterranean as an innovative, integral and unique destination for Slow Tourism initiatives (Corresponding call: ENI CBC Mediterranean Sea Basin Programme 2014-2020 - 1st call for standard projects). Main deliverables:
  - 26 Slow Tourism products and 6 ICT solutions created
  - 13 action plans for the implementation of Slow Tourism strategies in pilot areas
**MEDUSA** - Development and promotion of Mediterranean Sustainable Adventure Tourism *(Corresponding call: ENI CBC Mediterranean Sea Basin Programme 2014-2020 - 1st call for standard projects). Main deliverables:

- 33 training sessions organised on sustainable destination management and business planning
- 10 new or improved adventure tourism products
- 1 adventure tourism product co-creation programme.

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The CPMR Intermediterranean Commission gathers around 40 Member Regions from 9 different EU members states and other countries (Albania, Cyprus, France, Greece, Italy, Malta, Morocco, Spain and Tunisia). It is open to all the different sub-national levels in all Mediterranean countries.

The gathering of the Intermediterranean Commission Members Regions represents a bond of peace, stability and development between three continents, Europe, Africa and Asia.

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