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

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Executive Summary

Being Tourism such an important economic and social driver for Mediterranean regions, this study intends to provide an overview of its state of the art from a CPMR Intermediterranean Commission perspective and experience of its Member regions, and with particular attention to the sustainability of this sector. In this context, the concept of sustainability should be understood as addressing all its three components, i.e. encompassing its economic, social and environmental dimensions.¹

The document firstly introduces the policy context at EU level to then move to the Mediterranean background, including a focus on the main programmes and initiatives addressing this topic through specific priority actions or strategies.

A specific angle has been developed throughout the study to outline the impact of the unprecedented pandemic crisis generated by the COVID-19 outbreak, its related challenges for the tourism sector and the most relevant measures taken both at EU, national and regional levels to mitigate its effects and help the recovery phase (respectively summarised in the Annexes I and II). This information was particularly complemented by a dedicated survey (Annex III) to the CPMR Intermediterranean Commission member regions, which provided valuable insights for this analysis.

The CPMR Intermediterranean Commission priorities and actions related to Sustainable Tourism and Culture, both in terms of policies and projects, are described also in a dedicated section of the document, with particular attention to the Political Agenda on Sustainable Tourism: “Promoting Sustainable Tourism in the Mediterranean Regions” adopted by its members in 2018.

The last part of the study aims at highlighting the perspectives and opportunities for the sector, including the potential for collaboration to build a stronger sustainable tourism for the Mediterranean Regions.

The idea behind this work is that it should serve as a basis for further discussion at CPMR Intermediterranean Commission scale – and possibly beyond – on what the way forward to sustainable tourism should and could be, and especially in a COVID-19 aftermath period.

Eventually, this study should feed the debates and lead to deeper reflections on how territories, countries, institutions and more broadly speaking, multi-level governance stakeholders, actors of the tourism industry, the civil society and the private sector, can jointly build a more resilient tourism economy in the years to come, based on a stronger coordination of policies at different and across governance levels, seeing to it to enhance sustainability in all its economic, social and environmental dimensions.

¹ For more details, please see: https://cpmr-intermed.org/download/blue-growth-global-sustainability-technical-report (2018). This report has been drafted in application to blue economy sectors, but the examples and literature it quotes are also valid much beyond, and therefore relevant for the present study.
Introduction: Policy context and State of the Art

In Europe and for the European Union, tourism is a major economic activity with wide-ranging impact on economic growth (10% of the EU’s GDP), employment (13 million workers, i.e. 12% of occupied jobs in the EU), and social development. It can be a powerful tool in fighting economic decline and unemployment, mostly among the youth and in peripheral areas.

Nevertheless, the tourism sector faces a series of challenges in terms of demographic pressures, the use of resources, waste and water management or seasonality (to cite a few). The European Commission has been working to address these with specific policies and actions, even though no specific Directive has been so far developed on the matter.

In this sense, the European Union has been aiming at maintaining Europe’s standing as a leading destination (with a market share of 52%, Europe is the world’s number one tourist destination) while maximising the industry’s contribution to growth and employment, and promoting cooperation between EU countries particularly through the exchange of good practices.

The EU’s competence in tourism is one of support and coordination to supplement the actions of member countries. From 2007 on, it has been evolving through the proposal of specific solutions to the challenges of sustainable tourism, to the promotion of tourism as a key market for Europe in terms of competitiveness, quality standards and financial management in 2010.

Two years later in 2012, the Commission started raising awareness on the necessity to promote an integrated maritime policy for Europe, within which blue growth and tourism would play a consequent part; it indeed described some opportunities such as nautical tourism, investments in berthage capacity and harbour infrastructures. Consequently, in order to help European touristic destinations measure their performance in relation to sustainability, the Commission launched the “European Tourism Indicators System for sustainable destination management (ETIS)” the following year.

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2 European Parliament Resolution (2015), on “New challenges and concepts for the promotion of tourism in Europe.”
3 Ibid.
4 In 2007 the EU Commission adopted the Communication, “Agenda for a sustainable and competitive European tourism” proposing specific solutions to the challenges of sustainable tourism. In the context of sustainable tourism actions, a special focus is given to the diversification of the EU tourism offer.
5 The EU Commission Communication “Europe, the world’s No. 1 tourist destination – a new political framework for tourism in Europe” adopted in 2010, set out a new strategy and action plan for EU tourism. Four priorities for action were identified: (1) To stimulate competitiveness in the European tourism sector; (2) To promote the development of sustainable, responsible, and high-quality tourism; (3) To consolidate Europe’s image as a collection of sustainable, high-quality destinations; and (4) To maximize the potential of EU financial policies for developing tourism.
6 The 2012 EU Commission Communication “Blue Growth: opportunities for marine and maritime sustainable growth” highlights the importance of tourism in the employment and economy of the Mediterranean basin, and calls for an integrated maritime policy in order to exploit opportunities for Blue Growth. It also describes some opportunities such as nautical tourism, investments in berthage capacity, harbour infrastructures and recommends that every basin should have its own policies according to its specificities.
7 Promoting a common system of indicators, ETIS was first launched in 2013 and completed in 2016 with a toolkit and supporting electronic documents.
In 2014, coinciding with the beginning of the then new multiannual financial framework, the Commission presented a new strategy to enhance coastal and maritime tourism. The idea was to unlock the potential of this promising sector in Europe, which also led to reflect on the safety of tourism accommodation services in order to foster its competitiveness and increase its quality by focusing on safety issues. Following this strategy, the European Parliament issued in 2015 a Resolution on the “New challenges and concepts for the promotion of tourism in Europe.” They highlighted the need for a specific tourism-related section for the 2021-2027 Multiannual Financial Framework (MFF) in order to develop an integrated approach to tourism in EU policies. The EU Parliament also urged the Commission to finalise the European Charter for Sustainable and Responsible Tourism, following the Commission’s 2012 consultation.

Taking stock of the evolution of tourism in Europe, the European Parliament published a report on tourism practices and sustainability in April 2016. The report led to the conclusions that there was a lack of up-to-date data for both the environmental and social effects of tourism and that the tourism industry lacked a proper internalization of sustainable development costs. Indeed, the report also highlighted the high dependency of sustainable tourism initiatives toward public funding while calling for more integrated EU policies to create sustainable ‘development and tourism.’

Later in 2017, the EU Commission published a “Guide on EU funding for the tourism sector (2014-2020)” made to support and orientate public and private stakeholders’ efforts to benefit from European funds. It deepened its reflections with a study outlining how to balance low taxation aimed at relieving local tourism private stakeholders and the increasing need of public administrative structures for revenues. Following these reflections, the EU Commission announced in 2018 that the Executive Agency for SMEs (EASME) supporting SMEs would finance 5 Nautical Routes for Europe in order to foster transregional tourism.

The EU Parliament also published a report in October 2019, identifying future challenges and – where possible – emerging opportunities for the sector. This report draws a number of conclusions

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8 Communication on “A European Strategy for more Growth and Jobs in Coastal and Maritime Tourism” and Green Paper on “Safety of Tourism Accommodation Services.”
9 New challenges and concepts for the promotion of tourism in Europe (Resolution of the European Parliament of the 29th of October 2015, 2014/2241(INI)). The Resolution identified several challenges, such as increasing demographic pressures and seasonality in European touristic destinations and competition from emerging and less-expensive market destinations. Various opportunities can be tapped by EU policymakers and stakeholders, such as the promotion and branding of tourism in Europe, the development of sustainable, natural, rural and cultural tourism, the emergence of new business models based on sharing economy, digitisation, fostering transnational cooperation for products or thematic itineraries and focusing on the potential of coastal and marine tourism in a sustainable way.
10 This report (2016) can be consulted here: “From responsible best practices to sustainable tourism development.”
11 European Commission guide (2017) on “EU funding for the tourism sector (2014-2020)” Its annex “Additional examples for coastal and maritime tourism” describes the specific funds that can be used in the framework of maritime and coastal tourism.
13 This includes three routes taking place in the Mediterranean area: the Tuna Route, the Meltemi Route and the From Greece to Magna Graecia route.
14 This report (2019) was elaborated with the support of several European universities on “European Tourism – Recent developments and future challenges.” Its direct aim was to provide the Members of the TRAN Committee with an overview of European tourism’s current state of affairs.
and makes recommendations at EU policy level that support the sustainable development of the sector, including investment in technology, a more effective tourism governance, a better coordinated European marketing on tourism and the development of new skills and training, as also enhanced in the NECSTouR Strategy.

Overall and operationally speaking, at European and Mediterranean levels, one can notice that tourism has been increasingly evolving in the midst of European priorities, in correlation with the strategies and implementation axes of innovation or territorial cooperation programmes progressively addressing the sector and its sustainability. Among these programmes are identified (non-exhaustively): Horizon2020, COSME, LIFE, Interreg Mediterranean (2007-2013 and 2014-2020), European Neighbourhood Instrument Cross-border Cooperation Mediterranean (ENI CBC Med 2014-2020), Interreg Adriatic-Ionian (ADRION 2014-2020), and the Western Mediterranean Maritime initiative.¹⁵

More globally speaking, the European Union is also involved in the works of the United Nations’ World Tourism Organisation (UNWTO). The UNWTO published a report on Tourism and Employment in the European Union in 1998, which highlighted the importance of tourism in EU future economy. The report nonetheless acknowledged a lack in terms of standard criteria to define tourism employment, while it reminded the importance to tackle the issues of competition coming from emerging tourism areas. It also highlighted the need to address production factors’ low productivity that tended to cause a diminishing of employment for the sector. Finally, another important point mentioned in the report is the importance of balancing traditional tourism resources with new more sustainable tourism products.

Having said that, it is also worth noting that the UNWTO published in April 2018 the European Union international tourism trends in the EU up to 2017 report. More recently, in February 2020, the European Parliament Commission on Transports and Tourism held a meeting with the UNWTO Secretary General Mr. Zurab Pololikashvili in order to collaborate on future actions, i.e. regional and local development, public-private partnerships, further investments for regional authorities to foster sustainable development, exporting education and knowledge on tourism.

This short overview of the policy evolution about tourism at international, European, and Mediterranean levels suggests that tourism has been gaining importance over the years in our economies and ways of life indeed. Its growth has also brought some challenges that various reports, communications and strategies have highlighted, while efforts at various governance levels were produced in attempts to tackle them, somewhat in a discontinuous way, and therefore somewhat partially.

In the current context of living through the COVID-19 pandemic though and witnessing the aftermath of the measures undertaken by public authorities in a multi-level governance approach to tackle it, one understands that the tourism industry lacks a concrete sustainable component. Indeed, whether it be economically or environmentally speaking, observations are unequivocal: the sector is suffering one of its worst economic crises as regards capital and employment¹⁶, while Nature and

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¹⁵ The details about all programmes can be consulted in Annex IV.

wildlife in general have been flourishing again over the past months at an unusual rate\textsuperscript{17}. With an evident parallel to the Earth Overshoot day coming up three weeks later this year of 2020 in comparison to 2019\textsuperscript{18}, this latter point about ‘recovering wildlife’ is of course due to the slowdown of the whole world economy, sectors and human activity, but it would not be fair not to list tourism among one of the main causes, as the sector does have its share of big numbers, in particular in the Mediterranean.

All in all, a short reading of the current literature on the topic is therefore useful at the scale of this study to understand the high dependence of the tourism sector on traditional economic dynamics and hence its poor capacity to adapt itself in times of crises to ensure its social and human, economic and environmental sustainability.

Bearing these elements in mind, this study focuses on the impacts of the COVID-19 pandemic on the tourism sector with a lens on the Mediterranean, while analysing what measures Mediterranean regional authorities implemented on their territories to tackle it. Impacts, measures and expectations have also been expressed in a specific dedicated survey that the CPMR Intermediterranean Commission addressed to its members, and which results will nourish the reflections of this document throughout.

Lastly, the present global analysis also encourages a way forward to recovery including sustainability to a much greater extent in the evolution of the sector, notably by sharing experiences and projects outputs that have already made it a central component of their practices.

\textsuperscript{17} BBC commented earlier in a May 2020 article: https://www.bbc.com/news/science-environment-52754281.

\textsuperscript{18} https://www.overshootday.org (August 2020).
Impacts of COVID-19 on Tourism

Global overview

The COVID-19 pandemic is posing a significant and evolving challenge to the global community and especially the tourism sector. With the absence of tourist clienteles and the daily cancellation of cultural, sporting and business events, the tourism sector has been one of the sectors most affected by the COVID-19 health crisis. All over the world, tour operators and hoteliers have been worried about the sudden drop in attendance at major sites, and they were right to do so. According to the revised scenarios of the Organization for Economic Co-operation and Development (OECD), the COVID-19 impact could range between a 60-80% decline in international tourism economy in 2020, depending on the duration of the crisis. And in addition, including domestic tourism has been also heavily affected by containment measures.\(^{19}\)

The United Nations World Tourism Organisation (UNWTO) has revised its forecasts of international arrivals and revenues for 2020, while noting that any forecasts are subject to revision at a later date. According to them, international tourism could decline up to 78% in 2020, which would translate into a fall from $1.5 trillion in 2019 to up to $570 billion in 2020, with a potential loss of 100 million direct tourism jobs. The cost of this crisis, back in May 2020, was already three times the global economic crisis of 2009, which already meant a real shock for the sector indeed.\(^{20}\)

It is worth mentioning that these are still preliminary forecasts, since the situation continues to constantly evolve: despite the fact that somehow travels have restarted and that borders within the EU are more porous now as regards travelling, there seems to be a low confidence for the unknown evolution and duration of the pandemic still. Consequently, the ultimate economic impact of the reduction of international tourism might have even more serious repercussions on economies and societies that one cannot fully evaluate yet, as they would depend on the permanency of travel restrictions and quarantines on the one hand, but also on policies and measures implemented to support the recovery of the sector on the other.

As travel restrictions are being progressively – though unevenly – lifted, the UNWTO does stress the importance of international dialogue, coordination and cooperation, with the challenge of COVID-19 also being an opportunity to show that solidarity can be expressed across borders.

In this sense and more recently, the issue of the COVID-19 pandemic has been at the heart of several analyses and reports elaborated by the UNWTO, including among others, “A global insight on travel and tourism impacts”\(^{21}\), in collaboration with its Data Partners, and the more recent United Nations SDGs’ policy brief on “COVID-19 and Transforming Tourism.”\(^{22}\) The latter, after exposing worldwide forecasts and quite astounding numbers, reminds that this “crisis is also an opportunity to rethink

\(^{19}\) For more details, see: [https://read.oecd-ilibrary.org/view/?ref=124_124984-7uf8nm95se&title=Covid-19_Tourism_Policy_Responses](https://read.oecd-ilibrary.org/view/?ref=124_124984-7uf8nm95se&title=Covid-19_Tourism_Policy_Responses) (June 2020).


the tourism sector and its contribution to the [Sustainable Development Goals], nature, and the Paris Agreement on climate change; an opportunity to work towards a more sustainable, inclusive and resilient tourism."23

This latter concept leads us to address the recovery dimension of the sector of course, and some reflections on what the future would bring to it. Back in Spring 2020, a very preliminary estimate based on different economic recovery scenarios by the consulting firm Deloitte, outlined that key sectors for the economy such as tourism and travel would have a much longer and slower recovery compared to other parts of the economy (e.g. consumer business, financial services, technology media and telecommunications, energy and resources, public sector and health care).24 As an example, the airline sector, which brings in thousands of tourists a year, would also take time to recover from pre-crisis activity, air transport being indeed the main means of locomotion for international tourism.25 Similarly, the cruise industry – expected to reach 32 million passengers worldwide by 2020 – has been heavily impacted by the COVID-19 generated crisis.26 Lately, despite the gradual resumption of its activities, the cruise industry still struggles to regain passengers’ confidence as ferries were highly exposed in the media for being amongst the main clusters at the beginning of the pandemic.27

Comparatively, Deloitte also published back in the Summer a more “optimistic scenario,” predicting that the sector would know practically only domestic tourism, with weak activities concentrated in August. The emergence of videoconferencing would nonetheless delay the recovery at corporate travel, at least six months from the lifting of confinement and once considered safe to travel. And, finally international tourism would remain very depressed at least until next year. So far, according to this more optimistic scenario, the recovery phase of the economy would not begin until seven months after the lockdown is lifted28, which naturally, remains still to be proven.

Translated into numbers, the aftermath of this crisis seems to be abyssal, but it reminds us on top of everything that the tourism sector, in particular as it has been so far, is not economically sustainable. Should it have been otherwise, the adaptation options from the industry would have potentially allowed a lesser economic impact to happen, and therefore safeguarded lots of firms from bankruptcy with an avoidance of all implied related drawbacks. This remains of course a hypothesis, since there is no element of comparison to be able to truly say that the outcome would

25 For instance, German air transport group Lufthansa announced on Tuesday 7 April that it will reduce the size of its fleet, splitting up to 40 aircraft. The company will also close its subsidiary Germanwings. These decisions have been taken because of the coronavirus pandemic, which has brought the group's passenger operations to a virtual standstill.
26 The Cruise Lines International Association (CLIA) estimated that for every day that cruise activities are suspended in the United States, $110 million US and 800 direct and indirect jobs are lost. For more details: http://www.aivp.org/es/2020/09/17/volveran-los-cruzeros-encuesta-en-3-ciudades-portuarias-de-la-red-aivp (September 2020)
27 For more details, see: https://www.rts.ch/info/economie/11665233-le-dur-combat-des-croisieres-pour-regagner-la-confiance-des-passagers.html (October 2020)
have been different with a more economically sustainable sector. Nonetheless, this lets the door open as to think about other practices of tourism able to live through hard times as the current one, should they happen again in the future.

Likewise, beyond the costs for firms and for the world, EU and Mediterranean economies, the global impact of this crisis has placed many millions of livelihoods at risk, due to the strong multiplier effect and transversality of tourism activities on the whole economy and across sectors. Overall, it being in crisis threatens to increase poverty and inequality, in particular for vulnerable groups such as women and youth, for whom tourism has always been an important vehicle for integration and empowerment. This poses us again the question of the sector’s sustainability, this time considered through its social lens dimension.

In addition to these obvious socio-economic consequences and despite its usual high climate and environmental footprint that clearly decreased during this period, the shutdown of tourism-related activities resulted in months of limited- or no income, in particular for many protected areas and their respective local communities. As these areas are more dependent on tourism for living, the risk is that in the long run and with no alternative opportunities, over-exploitation of natural resources maybe the only way to generate income, to the detriment of ecosystems and heritage conservation. It is therefore crucial that adaptative measures and solutions be thought to overcome these challenges.

This latter point is another example questioning again the social sustainability of the sector, while addressing as well its environmental sustainability. The specific case of the protected areas is interesting though, as it reminds us that more environmental sustainability of the sector – usually the key element cared for by these communities – does not mean a decrease of its economic or social benefits, but rather the contrary. In this specific example, the negative impacts and lack of revenue came from the impossibility (and lack of trust) to travel, which seems to be in turn an indirect consequence linked to another dimension of the tourism sector itself, i.e. its massified strand (large clusters of people and poor diversification of itineraries meaning here, higher and faster risks of a pandemic propagation).

Complementarily, it is worth noting that from an environmental point of view, global lockdowns – implying a dramatic decrease in business and industrial polluting activities as well as road and air traffic and limiting human interactions with nature – have nonetheless led to an immediate improvement of air and water quality, while positively affecting the preservation of wildlife. However, let us remind ourselves that although the COVID-19 pandemic is causing important reductions in global emissions in the short term, this does not mean that it will contribute necessarily to tackle the longer-term climate challenge nor to the fulfilment of global climate change mitigation targets/objectives. For this, a deeper reflection on the path towards a more sustainable and smart recovery is clearly needed.

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30 For more details, see: https://trello-attachments.s3.amazonaws.com/5f560af19197118edf74cf93/5f59f8b11a9063544de4bf39/cdb10977949b38408f5322f9f676d/United_In_Science_2020_8_Sep_FINAL_LowResBetterQuality.pdf (September 2020)
Lastly, it may be noted that the COVID-19 crisis is also generating a high level of uncertainty regarding possible changes in consumption patterns and living habits. The consequences of the “new normality” on the tourism sector once the pandemic will pass will depend not only on the evolution of the disease over the coming months or semesters, but also on possible changes in habits of physical distance and international mobility. These changes may become codified and subject to specific instructions from public authorities, which the sector will certainly need to adapt itself to.

**In Europe and the Mediterranean: evaluating impacts**

With the summer season coming to an end, it seems undoubtedly clear that COVID-19 has severely affected the tourism industry in Europe, following decades of relatively stable growth. The outbreak of the pandemic beginning of 2020 in Europe led to an abrupt halt in the sector in most countries. Everything suggests that tourism activities will remain weak in 2020 as a whole, which will be a major burden for the entire economy given the sector’s transversality to other sectors, and hence its importance for the global GDP.

A recent JRC report predicts that – with a second wave of infections – tourist arrivals in the EU could decrease up to 68% in 2020 for the whole year compared to the value registered in 2019. For 2020, depending on the scenarios, this would place at risk between 6.6 and 11.7 million jobs, facing a reduction in working hours or even permanent job loss. According to the World Travel & Tourism Council, a more dramatic scenario is even to be expected. Forecasts for the EU show that compared with 2019 figures, travel and tourism job losses could range between €8.8 and €18.3 million, while in terms of GDP this could mean a loss ranging from €510 and €1.064 billion in the worst-case scenario.

With more than 300 million tourists per year and an important number of countries highly dependent on tourism in terms of share of GDP (e.g. Croatia, Cyprus, Malta, Greece, Spain but also Montenegro, Albania, Lebanon), the Mediterranean region has been among the worst affected areas economically but also socially speaking. In this sense, countries severely affected by the pandemic in the northern Mediterranean, as well as countries on the southern shores with high external debt or heavy dependence on oil exports or tourism, are expected to suffer more intense socio-economic repercussions than others.

To give out some examples, according to the survey “Impact of the COVID-19 pandemic on EU and Mediterranean tourism industry” the CPMR Intermediterranean Commission sent to all its member Regions, each Region has felt a very high impact of the measures undertaken to tackle the pandemic in term of influx of international visitors during summer season.

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33 Data per country available here: [https://wttc.org/Research/Economic-Impact](https://wttc.org/Research/Economic-Impact) (September 2020).
34 For more details, see: [https://ufmsecretariat.org/fr/consequences-economiques-covid](https://ufmsecretariat.org/fr/consequences-economiques-covid) (April 2020).
Nevertheless, conclusions are more heterogeneous regarding domestic visitors. On the one hand, most of the Mediterranean regions on the mainland did not register a significant impact of the measures to tackle the COVID-19 pandemic on influx of national visitors (Lazio, Western Greece, North Macedonia, Generalitat Valencia and others, showed in orange), while some regions such as Région Sud in France even noticed an increase. On the other hand though, insular regions (showed in green), already deprived of an important part of their habitual foreign tourists, also witnessed a high decrease of inbound domestic visitors, making them especially vulnerable in front of the pandemic impacts.
This situation is obviously having important economic consequences for the Mediterranean tourism industry. According to the same survey, a very high majority of answers highlighted important impacts on hotel resorts, restaurants and cafes, attractions and activity operators sectors, while half of the respondent Regions also deplored serious impacts on self-catering, hostels, and caravan and campsites sectors.

Nonetheless, the most answers to the survey seemed to agree with the fact that all types of touristic enterprises (large firms and corporations, small and medium enterprises (SMEs) and micro-enterprises alike) suffered a major negative impact. This, with a specific mention to SMEs (restaurants, medium size hotels, etc.) that seem to have been particularly affected.

In terms of businesses’ loss of annual revenue due to the COVID-19 crisis, regions with different typologies of geographical and economic contexts (Region of Murcia, Tuscany, Corsica, Generalitat Valenciana, Ionian Islands) seem to have experienced similar negative results (between 60 and 80%). Consequently, employment has been highly affected, notably in regions where tourism encompasses an important share of permanent and seasonal jobs. On the one hand, Regions estimated that around 80% of touristic enterprises on their territories had to furlough staff during the lockdown, and a little bit less than 70% had to do so after the lockdown. On the other hand, they estimated that only 29% of them could hire seasonal staff. Regions have explained that these difficulties in hiring were mainly due to the reduction of seasonal activities and to the lack of available revenues.

What were the main barriers limiting the hiring of seasonal and other permanent staff?

- Reduction of the seasonal activities: 45%
- Lack of finances: 3%
- Difficulties to hire other countries' workers / travels restrictions: 34%
- Difficulties to ensure and follow health safety measures and protocols: 17%
However, the survey results suggest that positive environmental impacts have been generally noticed, particularly in very touristic areas. This is partly linked to the number of tourists around the Mediterranean. And indeed, some first resurgences of environmental degradation have already been observed during the second part of summer season in correlation to the resumption of tourism activities, for example on Lazio Region’s seaside.

On the sea, the fall of tourism activities resulted in a considerable reduction of passenger ship density and thus of CO₂ emissions. The map (on the following page) shows that the decrease of passenger ship density is clearly conspicuous during the lockdown (April), but also after the resumption of cruise sector during the summer. The number of roads used by ferries was still low in August 2020 compared to the same month last year, which one can interpret as many ships staying docked, as well as lower ship density on a same road (from green-low density, to red-high density). This is particularly visible on the Croatian coastlines for example, and even more so over the Adriatic-Ionian area.

Finally, the survey addressed to the CPMR Intermediterranean Commission members highlighted that the COVID-19 had also noticeable repercussions on the quality of tourism products, positively or negatively alike, as 75% of the Regions contacted affirmed. Unfortunately, it is still difficult to assess more precisely these effects at the present time, as some answers seemed to show difficulties when time came to evaluate the positive or negative externalities of the pandemic on the various strands of the tourism industry (health tourism, convention tourism, cultural tourism, natural or water linked tourism, etc.).

In the same vein, other answers lacked relevance and did not offer sufficient input to identify a conclusive trend on the improvement or not of the touristic offer. However, the door remains open as to work on such a report later, once data and more accurate assessments at local, regional and national levels are available.

For more details on the impacts of the pandemic on Mediterranean countries and regions, please refer to Annex I of the present study. All answers to the survey are also available in Annex III.

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35 Mostly, the analysis covers the territories that are members of the CPMR Intermediterranean Commission.
Passenger ship density maps before, during, and after the first surge of COVID-19 pandemic in Europe

2020

January

2019

April

August

Picture composition by G. Mannarini (CMCC) on data by EMSA published by www.emodnet-humanactivities.eu
Tackling COVID-19: measures undertaken at EU and Mediterranean levels

At European and Mediterranean level: cooperation is key

At European level

During Spring 2020, at European level, the proposed measures and initiatives mainly aimed at fostering collaboration and cooperation to join efforts for a common answer to tackling the COVID-19 crisis. Facilities for businesses and travel industry actors, both during and after the emergency, were thought to ensure a strong and unified recovery in each affected area.

Notably, back in March 2020, the European Tourism Manifesto Alliance, an organisation in which a number of key tourism stakeholders and institutions are cooperating, has issued a declaration calling on businesses and institutions to work together to implement measures as quickly as possible to stem the impact of the pandemic on the European tourism sector. The declaration follows a press release from the European Commission which, on the 13th of March, indicated a list of guidelines and measures to be followed to control the crisis and revive the economy, calling on everyone to cooperate.36

In particular, the Alliance addressed the European Commission and the governments of the member states, indicating the most urgent measures to be implemented in the travel sector. It then stressed the importance of state aid for the tourism and travel sector from national governments, with easy access to short and medium-term loans and tax breaks such as deferral of tax and social security contributions, especially for SMEs. With regards to human resources, the Manifesto focused on protecting employees, avoiding unemployment and loss of income, also through the launch of the European unemployment reinsurance scheme. It also proposed initiatives such as the immediate adoption of the temporary airport slot renunciation for airlines. Finally, the Alliance called for closer co-operation between national authorities in order to send a unified message in terms of advice to travellers in the affected regions and requirements for travellers returning from these regions.37

Nonetheless, it is worth noting that these recommendations were addressed at the very beginning of the pandemic, most probably with a short-medium term vision. There are still valid now that the Summer season has passed at the time this report is being revised, but there will still remain some challenges when the time will come to implement them.

And indeed, following the evolution of the pandemic and its impacts on EU countries, regions and territories, the European Commission adopted a temporary initiative to allow Member States to use all the flexibility provided by the budgetary rules to support the economy in the context of the COVID-19. More specifically, the EU and its Member States have been taking measures back in Spring

2020 to minimise the impact of the crisis on the economy, thanks to a dedicated budget coming from different sources and funds:\footnote{For more details, see: \url{https://ufmsecretariat.org/fr/consequences-economiques-covid} (April 2020).}

1. €37 billion from the EU budget have been allocated to the Coronavirus Investment Initiative to support the most exposed sectors such as health systems, small and medium sized enterprises (SMEs) and the labour market.
2. Up to €28 billion of structural funds from the 2014-2020 national envelopes, which are not yet allocated to projects, will thus become available to respond to the crisis.
3. Up to €800 million from the EU Solidarity Fund have been made available for the hardest-hit countries by extending the scope of the Fund to public health crises.
4. Up to €40 billion have been allocated to meet the short-term financing needs of SMEs through the European Investment Bank.\footnote{For more details, see: \url{https://www.dropbox.com/s/gc5z3sele8736dd/MEPs%20call%20for%20changes%20to%2014-2020%20EMFF%20during%20pandemic.docx?dl=0} (March 2020).}

The European Commission Internal Market Tourism Unit has set up, in cooperation with the European Travel Commission, an \textit{ad hoc} network of European tourism and travel industry associations to exchange information and assess impacts in real time to support tourism within the European Coronavirus Response Team. The Commission has also been monitoring the impact of the epidemic in the travel and tourism sector and ensuring that relevant legislation is clarified and revised in response to industry requests, while seeking to ensure that the industry is the direct beneficiary of the EU Coronavirus Investment Initiative.\footnote{For more details, see: \url{https://necstour.eu/Coronavirus} (April 2020) and the European Commission’s Communication C(2020) 1830 final of March 2020: “Interpretative Guidelines on EU passenger rights regulations in the context of the developing situation with Covid-19” \url{https://ec.europa.eu/transport/sites/transport/files/legislation/c20201830.pdf} (April 2020).}

On the 24\textsuperscript{th} of March 2020, Tourism Task Force (TTF) members of the Transport and Tourism Committee in the European Parliament proposed to the Commission a “Tourism rescue action plan” in order to tackle the damages of the COVID-19 pandemic.\footnote{For more details, see: \url{https://www.europarl.europa.eu/cmsdata/206726/STAMPED_Tourism%20Task%20Force%20-%20Letter%20to%20EU%20Commission.pdf} (April 2020). This has been followed by the proposal of a joint roadmap by the European Commission and EU Council on April 15, 2020 readable here: \url{https://ec.europa.eu/info/files/communication_-_a_european_roadmap_to_lifting_coronavirus_containment_measures_0.pdf} (April 2020).}

The European Parliament approved three initial measures in response to the crisis during its 26\textsuperscript{th} of March extraordinary session that would benefit businesses and workers in tourism. The first one aims to launch the Coronavirus Response Investment Initiative, the second to extend the EU Solidarity Fund to cover public health emergencies, and the third one to temporarily suspend airport slot rules.\footnote{For more details, see: \url{https://epthinktank.eu/2020/04/07/covid-19-and-the-tourism-sector} (April 2020).}
A proposal to amend Regulations (EU) No 1303/2013 and (EU) No 1301/2013 was approved during the European Parliament Plenary Session of the 17th of April 2020 with a view to providing exceptional flexibility for the use of European Structural and Investment Funds in response to the COVID-19 pandemic.43

Later on in May, the Commission adopted a comprehensive package of initiatives to allow for a coordinated framework to resume transport and tourism safely, enable Europeans to travel and enjoy the summer tourism season in safety, as well as address pressing issues for tourism operators and consumers.44 To implement this initiative, the Commission also made available the Re-open EU platform, including information on public health and safety measures of destination countries.45

**At Mediterranean level**

Beyond the mere EU level, other organisations working at a Mediterranean level such as the Union for the Mediterranean have committed to supporting governments in developing effective cooperation and coordination in all key sectors to address the impacts of the crisis. The UfM has therefore been working with its partners and other multilateral organisations to create sustainable and resilient societies and economies. In this context, several activities are already envisaged with a view to promoting the social and solidarity economy, supporting micro, small and medium-sized enterprises, unlocking the full potential of digital, research and innovation, revitalize the blue economy sector, accelerating gender equality and addressing the challenges posed by the informal economy.46 All these incentives could be allied in support of all sectors in the Mediterranean to recover better from the crisis.

**Some reflections**

Currently and stepping back a bit from these previous listed initiatives and responses, let us remind ourselves that further to these measures at EU and Mediterranean levels, several debates have been going on throughout the summer 2020. Notably, in view of the design and implementation of the recovery instruments made available by EU institutions.

As there seems to be so far no common strategy for tourism at EU nor Mediterranean level, and because of its particular Mediterranean economic tissue mainly made out of SMEs, it remains challenging to understand how to work jointly with multi-level governance stakeholders, the private sector, and citizens towards recovery.

Some key issues such as the involvement of local and regional authorities in the designing of recovery packages at EU and nationals levels have been addressed, for example in the framework of


44 The package “provides guidance on safety and health protocols for hospitality establishments, passenger transport and lifting of internal borders as well as recommendations on vouchers issued by package travel organisers and airlines. [It] should enable companies and public authorities to plan and prepare for de-confinement while providing reassurance to European citizens and allowing them to plan their holidays and travel in safety.” For more details, see: [https://ec.europa.eu/growth/sectors/tourism_en](https://ec.europa.eu/growth/sectors/tourism_en) (October 2020).


46 For more details, see: [https://ufmsecretariat.org/fr/consequences-economiques-covid](https://ufmsecretariat.org/fr/consequences-economiques-covid) (April 2020).
the SEARICA Intergroup of the European Parliament (July 2020)\textsuperscript{47} or during the European Tourism Convention (October 2020)\textsuperscript{48}.

This latter event aimed to establish a dialogue on sustainable recovery and set strategic orientations to guide future work and cooperation on tourism, towards a European Agenda for Tourism 2050. It gathered approximately 600 participants representing a broad variety of stakeholders at all governance levels. The event has allowed the identification (or rather a reminder) of various issues, opportunities and recommendations thereof articulated around three main pillars: safe and seamless tourism, greener holidays, and tourism powered by data. The conclusions would serve the smart and sustainable recovery of the sector, for example enhancing a coordinated action to boost recovery and fund action for a green, digital and resilient tourism, where the involvement of Regions would be fundamental. These reflections are summarised in a set of 30 concrete action points that should feed the discussions related to the elaboration of a new EU Tourism Strategy and action plan. In the same vein, several recommendations from the CPMR Intermediterranean Commission are therefore available at the end of this report.

**Mediterranean National & Regional levels: different responses**

In view of the significant impact of the COVID-19 outbreak registered so far and expected in the months and years to come, the responses given to face the subsequent socio-economic crisis at national and regional levels in the Mediterranean have been of different types and reach. (From the beginning, one can note that these various levels of response constitute themselves a challenge to tackle the impacts of the crisis in a concerted and cohesive way.)

With this in mind, this section includes a brief overview and analysis based on the repository of the main support policy measures listed in the Annex II of the present study and put in place by national and regional governments in the area. As a general remark, containment measures to tackle the public health crisis, including travel restrictions imposed, are not considered for the purpose of this analysis.

The variety of initiatives listed in the inventory range from economic and fiscal measures to ensure business continuity and protect employment in the sector, to other kinds of supporting and coordination measures. For instance, an increased flexibility in procedures or the provision of information, assistance and guidance for businesses to ease the recovery phase including the promotion of the necessary digital solutions and trainings, among others.

**At National level**

On a national scale, general economic and fiscal interventions to support most affected enterprises have been largely promoted by most countries in the Mediterranean area. These measures – addressing the business sector in general, but often applying to tourism enterprises as well – aim at ensuring the necessary cash flow support for micro and SMEs and/or self-employed professionals. They may include liquidity injections in forms of public guarantee schemes, loans and

\textsuperscript{47} To check and read the conclusions from the event, see: [http://www.searica.eu/documents/category/57-documents-of-the-event-7-july-2020](http://www.searica.eu/documents/category/57-documents-of-the-event-7-july-2020) (July 2020)

\textsuperscript{48} To learn more about this event, see: [https://ec.europa.eu/growth/content/european-tourism-convention-2020](https://ec.europa.eu/growth/content/european-tourism-convention-2020) (October 2020).
credit lines, among others (e.g. Cyprus, Malta, Portugal, Slovenia, Spain). In some cases, such as in Croatia, Italy, France, Montenegro, Portugal and Spain, a dedicated economic support for the tourism sector has been foreseen, including specific grants, credit or loan lines, as well as state aids (e.g. Slovenia). As to fiscal policies, many Mediterranean countries (e.g. France, Malta, Portugal, Slovenia) have decided to apply a partial/full temporary suspension/deferral of tax/debt/loan payments (e.g. VAT, social security/welfare contributions, etc.). In Cyprus, Croatia, Greece and Italy, dedicated fiscal measures have been taken in relation to particular tourism-related fees or taxes and payments for tourism businesses.

In terms of employment measures, general unemployment allowances, wage subsidies and social security benefits have been guaranteed for businesses affected by the crises by various countries (e.g. Cyprus, France, Malta, Portugal, Slovenia) to help maintain jobs and avoid redundancy. In some countries, such as Greece and Italy, dedicated allowances and social security benefits for tourism sector workers have been additionally provided. Furthermore, sometimes special leaves for specific categories of workers (e.g. parents, people caring for relatives with disabilities, etc.) have also been introduced (e.g. Cyprus, Italy, Malta).

On case by case as regards tourism specific measures, regular meetings of the French Office of the Tourism Committee (Bureau du Comité de la Filière Tourisme) were foreseen to accompany the sector in this difficult period. Similarly, Greece has activated a special Committee for Crisis Management, in charge of monitoring the developments of the crisis, informing tourism operators and elaborating concrete proposals to support the Greek tourism market. Equally, Italy has prepared an extraordinary promotional campaign to relaunch the country image in the world, Spain presented a new strategic plan for tourism, while Portugal has particularly invested in an online support centre created by Turismo de Portugal, aiming at assisting businesses in developing the appropriate measures to reduce the negative impact of the crisis. In addition, the training department of Turismo de Portugal intended to further facilitate the use of online trainings and new virtual learning tools.

Among other measures to support the tourism sector, countries such as Croatia, France and Italy have also decided to apply greater flexibility or modify reservation rules in relation in particular to cancellation conditions. This has allowed the replacement of direct reimbursement with vouchers for customers’ trips and bookings, in order to reduce the immediate cash outflows for tourism businesses in difficulties.

Another interesting initiative that is worth mentioning in this context has been the emerging voluntary cooperation between the tourism and health sectors, at different levels: indeed, in the current circumstances, many businesses have demonstrated their availability and willingness to support the health system, for instance hosting health professionals or people in quarantine in their establishments (e.g. the online platform OpenRooms.Portugal.com supported by Turismo de Portugal).

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49 In order not to load the page too much, all sources are listed in the corresponding Annex II of the present report.
50 For more details, see: http://www.turismodeportugal.pt (April 2020).
At Regional level

In parallel with the variety of measures implemented at national level, Mediterranean regions have sometimes launched further initiatives to support the tourism sector, which one knows, plays a key role in their respective regional economies.

These interventions have been developed, for instance, in forms of direct aid, grants, guarantee funds to any company affected by the COVID-19 related crisis (e.g. Occitanie, Sicilia), or targeting specific economic categories – such as self-employed professionals, the numerous SMEs or micro enterprises operating in tourism (e.g. Corsica, Région Sud, Campania, Lazio, Liguria, Marche, Puglia, Sardegna, Toscana, Catalonia) – to help cover working capital needs, or costs such as rentals, loans, salaries or even invest on technological modernisation (e.g. Valencia). In terms of fiscal policies, the postponement of specific tourism-related tax payments has been foreseen for example by Catalonia.

As a concrete illustration, all the regions that participated to the CPMR Intermediterranean Commission’s survey “Impact of the COVID-19 pandemic on EU and Mediterranean tourism industry” mentioned that they provided financial support and/or resilience fund to tourism businesses and operators impacted by the crisis. These supporting measures were mainly applied according to the difference of revenues compared to 2019, and to the size of enterprises. Hence, privately owned micro-enterprises and SMEs were specifically targeted in some regions (e.g. Western Greece, Ionian Islands, Valencia, Région Sud, Catalonia). Let us note that this may not have prevented other regions from mainly granting the same type of businesses, only that the answers to this point of the survey did not bring any specification.

Conversely, the typology of businesses that applied to regional support equally included privately owned micro-enterprises, SMEs, and larger firms and corporations (e.g. Canary Islands, Lazio, Region of Skopje), while a region like Tuscany mostly granted the latter ones.

Still according to the survey, the amount of financial aid varied according to the regions. In Western Greece for example, the resilience fund reached €30 million with a deadline for application on October 26, 2020. In Catalonia, €15 million were released, for which around 5,000 enterprises applied, while in Occitanie there was a €25-million emergency plan and a recovery plan is being implemented. In parallel, some regions that answered the survey said they also helped regional tourism businesses through universal credits (Murcia, Valencia, Tuscany) and by facilities to interrupt or postpone instalments for some businesses which took out a loan (Occitanie, Région Sud, Tuscany, Region of Skopje).

In some cases, more flexibility and assistance are provided to tourism businesses, for them to easily comply with specific formalities and obligations (e.g. Puglia) or better adapt regulations to the challenges linked to the crisis (e.g. Corsica).

Some other regions have decided instead, to further invest in their coaching and training offer, with a special focus on online trainings, as well as provide specific information and recommendations in relation to the COVID-19 situation for tourism businesses as a part of their regional strategies (e.g. Andalusia, Valencia, Veneto). According to the survey, Ionian Islands, Canary Islands, Valencia, Lazio and Tuscany offered training session about tourism activities during and after the crisis.
Lastly, tourism action plans to facilitate the recovery phase of the industry post-crisis – including promotion strategies and communication or digital campaigns, with a focus on the relaunch of regional destinations – have been developed by some Mediterranean regions (e.g., Corsica, Region Sud, Andalusia, Valencia). Sicily has been defining procedures for the “SEE SICILY” Voucher program, which aimed to support the tourism sector on the regional territory during the post-emergency phase of Covid-19. This program should benefit in part from the €75,000 resilience fund released by the Region.

**Some reflections**

Although no assessment of the analysed measures is really possible at this stage, the recovery modalities and timing will say in the next future to what extent the resilience proved by both national and regional governments, as well as a proper combination of supporting interventions, have been successful in accordance with their purpose. The various actions put in place at national and regional levels (and certainly local levels, that have not been counted as participants to the survey) let us the opportunity to compare them (not in a competitive way!) and understand how synergies may be created across territories to bear more impacts on the ground.

In this sense and as already expressed by the United Nations (earlier quoted), this crisis might be a great opportunity to start reflecting on how we can build a more resilient and sustainable tourism economy in the years to come. This, including a much stronger multi-level governance concertation for the elaboration of policies, and their coordination in times of implementation at different multi-level governance scales as well, hand-in-hand with the private sector, local and regional authorities, the civil society, hence ensuring that sustainability in social, economic and environmental terms be truly enhanced.
Current works on tourism at the CPMR Inter-Mediterranean Commission level

Positions, Priorities & Actions

_Policy orientations for the network_

Since 2015, at CPMR Intermediterranean Commission level, the organisation and its members have developed a variety of actions and projects focused on Sustainable Tourism and Culture in the Mediterranean, including a Political Agenda on Sustainable Tourism in the Mediterranean Regions.

In particular, within the Working Group on Economic and Social Cohesion – co-led by the Occitanie and Lazio Regions, the CPMR Intermediterranean Commission has created a dedicated Task Force dealing with Sustainable Tourism. This Task Force, set up in 2015 and currently led by the Crete Region, is devoted to defining the framework, political initiatives as well as projects on sustainable tourism for the network.

The following list sums up its thematic objectives, linking them to the main priorities identified:

I. **TO STIMULATE PERFORMANCE & COMPETITIVENESS**
   - Encouraging an extension of the tourist season
   - Encouraging public-private dialogue
   - Promoting skills
   - Encouraging R&D and new ICT solutions

II. **TO IMPROVE KNOWLEDGE**
   - Facing lack of data and/or comparability of data
   - Promotion of certification and/or setting-up of regional/local “labels”

III. **TO STRENGTHENING SUSTAINABILITY**
   - Promotion of ecotourism

IV. **TO ENHANCE THE MAINSTREAMING OF TOURISM**
   - Promotion of “Sustainable” and “Cultural” tourism in the main emerging macroregional strategies and maritime initiatives (e.g. Adriatic-Ionian and West Mediterranean).

The main goal of the CPMR Intermediterranean Commission concerning sustainable and culture tourism is therefore to position the Mediterranean as a truly green touristic destination but also to maximize its potential for young entrepreneurship, SME growth and overall sustainable local development, more specifically:

- To ensure a sustainable tourism-related economy, respecting environmental norms, being pro-active in terms of protection of biodiversity, environment, and reduction of contamination.
- To reduce the socio-economic impacts of tourism on residents’ economies and ecosystems, while seeking to benefit local economy and development.

As a key economic driver in many of CPMR Intermediterranean Commission’s member regions and thanks to its transversality, sustainable tourism represents a topic of interest with great potential.
for further development and synergies among other CPMR geographical commissions, hence covering most of the European coastal territory (Islands Commission, Balkan & Black Sea Commission, Atlantic Arc Commission, North Sea Commission, Baltic Sea Commission). Of course, the latest developments of the sector as a result of the pandemic would deserve a revision of this agenda, encompassing orientations to foster collaboration among Mediterranean Regions to better address their recovery.

**Key project experiences: building recommendations from the ground**

In line with this approach, and with the idea to enhance cross sea-basins capitalization, the CPMR Intermediterranean Commission’s ongoing projects related to sustainable tourism mainly deal with management and planning aspects, indicators and decision support systems, ecotourism, seasonality, innovative technologies and open data, governance, and empowerment/capacity building of and for the tourism sector. These experiences are also key to technically back up the priority actions and policy recommendations developed in the framework of the network. A more detailed list of these projects can be found in Annex V of the present study.

Some priority actions have indeed been drawn by the CPMR Intermediterranean Commission based on its experience and knowledge developed both in the framework of sustainable tourism projects and through its dedicated Task force discussions and Political Agenda on Sustainable Tourism:

- The strengthening of integrated and sea-basin related multilevel governance frameworks that promote sustainable tourism;
- The sustainable planning and management of tourism through the action of local and Regional authorities and the application of principles, approaches and tools such as the Integrated Coastal Zone Management (ICZM), Maritime Spatial Planning (MSP), the Ecosystem-Based Management principles, participatory planning, along with more specific measures;
- The stimulation of performance and competitiveness, favouring the sustainability/environmental quality element like encouraging an extension of the tourist season by promoting alternative offers, such as rural tourism, hinterland, slow tourism, cultural tourism, ecotourism;
- The improvement of knowledge, by complementing the lack of comparable data and common indicators on sustainable tourism as well as promoting certifications/labels;
- The building of effective collaboration among tourism stakeholders, through the medium of new networks to diffuse and disseminate policies, project results, and good practices gathered within the framework of ecotourism (using different networks such as the

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51 This Agenda was developed back in 2018 and would deserve to be updated according to the last development as a consequence of the COVID-19 pandemic. Nonetheless, the elements it highlights still constitute a strong basis able to nourish reflections for a smart and sustainable recovery of the sector. For more details, see: “Promoting Sustainable Tourism in the Mediterranean Regions” (February 2018).
MedCoopAlliance\textsuperscript{52} or Arco Latino, as well as the Intermediterranean Commission network of regions;  
- The raising of citizens’ awareness on environmental and sustainable tourism via participating in public events with technicians and experts, on environmental and touristic issues;\textsuperscript{53}  
- The promotion of youth entrepreneurship in the sector with adapted tools (like platforms) to foster networking between young people;  
- The support to enhancing the acceleration of clean energy investments in Mediterranean Tourism Industry and transports.

These previous points are the result of the CPMR Intermediterranean Commission’s extensive experience collaborating with a broad variety of stakeholders in the framework of its cooperation projects. Naturally, each of these projects (listed in Annex V), provide an inestimable pool of information, results and recommendations of theirs worth exploring, in order to contribute to the debates and potential policy-making for the smart and sustainable recovery of the sector.

Beyond the availability of these information, alongside the CPMR Intermediterranean Commission’s study results from its members, they also translate experiences and situations from the very local and regional levels. These are essential elements to know about to ensure a sound response from EU, national, regional and local authorities, as from the civil society and the private sector for the recovery of tourism in the Mediterranean.

**Perspectives & Opportunities**

The current context of the COVID-19 pandemic is certainly the opportunity to further support and share the Intermediterranean Commission orientations, taking into account the important socio-economic consequences on employment and tourism industry that this crisis obliges to face. Establishing also a parallel with the expectations from Regional authorities as expressed in the CPMR Intermediterranean Commission survey would also be a way to understand how to articulate further collaboration pathways.

 Added value of collaborating with the CPMR Intermediterranean Commission

Collaborating with the CPMR Intermediterranean Commission and its members is key to ensure that Regional levels are clearly represented and involved in the reflections, co-design and implementation of policies at EU and national levels, but also in a view to collaborate across regions and territories of the Mediterranean. Besides, a close collaboration with regional territories counting with both specific assets and sometimes limitations by being maritime, coastal or insular areas is key to ensure a sound relevance of measures to be implemented, and even more so in a context of recovery from the COVID-19 pandemic crisis.

\textsuperscript{52} See also the Alliance’s statement on tackling the COVID-19 pandemic: https://cpmr-intermed.org/uncategorized/the-mediterranean-cooperation-alliance-reflects-on-post-pandemic-scenario-actions/10409 (March 2020).

\textsuperscript{53} To this, one could add as well the need to raise awareness to the private sector for more sustainable practices of tourism.
This collaboration could therefore be outlined as follows:

1. **Reinforcing collaborations and advocacy activities** with relevant European bodies, especially the European Parliament Intergroup SEARICA and the **Task Force on Tourism of the Committee on Transports and Tourism (COM TRAN)**. The CPMR Intermediterranean Commission, through its network and solid experience on the matter of sustainable tourism could bring a real added value to the reflections of the mentioned Task Force, including inputs drawn from the works with its fellow CPMR geographical commissions or key external partners (e.g. the Travel Foundation or NECSTouR). Joint advocacy actions and possible events should also focus on the modalities of **implementation of the new EU Green New Deal** in the Mediterranean basin in relation with the **recovery of the tourism sector hardly hit by the COVID-19 crisis**, or towards relevant EU Directorates-General about **costal and maritime tourism** within the blue economy and emerging basin strategies.

2. **Reinforcing the existing synergies with organisations** such as the **Union for the Mediterranean**, the Travel Foundation, NECSTouR, OTIE or the UNWTO, so to improve the exchange of knowledge on sustainable tourism, the impact of the crisis and the way forward as well as the partnership between the public, the private sector and the academia.

3. **Reinforcing synergies with the various networks and cooperation frameworks** the CPMR Intermediterranean Commission is already involved in, such as the Interreg MED Sustainable Tourism Community, the ENI CBC MED Programme, BLUEMED, EUSAIR, WESTMED, or the **Mediterranean Cooperation Alliance**.

**Some expectations from CPMR Intermediterranean Commission members**

In order to foresee at which level cooperation could be increased in a multi-level governance dynamic to tackle in a sounder way the aftermath of the COVID-19 crisis, CPMR Intermediterranean Commission members were ask to rate the relevance of various instruments to activate for the recovery of the sector.

By order of importance (10 very much needed to 0 not needed), the average of their answers per type of instrument or measure indicated the following:

1. “**The creation of a dedicated budget line on sustainable tourism in the next Multi-annual financial framework**” and “**European Investment Bank (EIB) responses to cover short-term SMEs financing needs**” were rated the highest (+8/10).

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54 A dedicated event was celebrated back in July 2020, also highlighting the 13 principles for the Future of Tourism, which the CPMR Intermediterranean Commission has fully supported. Check all reports here: [http://www.searica.eu/documents/category/57-documents-of-the-event-7-july-2020](http://www.searica.eu/documents/category/57-documents-of-the-event-7-july-2020). (July 2020).

55 See full options here: “**The EU Coronavirus Investment Initiative and Cohesion policy (including Structural funds from the 2014-2020 national envelopes, the European Social Fund geared towards supporting workers and healthcare), Creation of a dedicated budget line on sustainable tourism in the next Multi-annual financial framework, EU Solidarity Fund extended to public health crises in most affected countries, European Maritime and Fisheries funds to support investments contributing to the diversification of fishermen’s incomes, European Investment Bank responses to cover short-term SMEs financing needs, Public-private partnerships, Private investments, Other.**” The respondents were asked to rate from 0 (not needed) to 10 (very much needed) the various proposed options. The results are the mean calculations of all answers to each one of the proposed options.
2. They are followed closely by the option of the “EU Solidarity Fund extended to public health crises in most affected countries” (+7.75/10).
3. And then by “The EU Coronavirus Investment Initiative and Cohesion policy (including Structural funds from the 2014-2020 national envelopes, the European Social Fund geared towards supporting workers and healthcare)” and “Private investments” (a bit more than 7/10).
4. “Public and private partnerships” and the “European Maritime and Fisheries funds to support investments contributing to the diversification of fishermen’s incomes” were rated less (6-6.5/10).
5. While options for other initiatives were not often quoted (“direct aid to tourist companies”) nor explicitly targeting any type of fund or instrument.

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<th>Which EU instruments/policies do you foresee to be the most efficient for tourism recovery in your Region?</th>
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<td>The EU Coronavirus Investment Initiative and Cohesion policy</td>
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It comes with no surprise to see that most Regions expect support from European Union instruments or the EIB (points 1, 2 & partly 3). This implies that their high expectations should be met with relevant actions, which would hardly happen if the regional and even local levels are not present to the proper reflections on the designs of these instruments’ measures.

Surprisingly enough though, they also expect that private investments be added to the equation (point 3), which is encouraging to understand the Regions’ willingness to ally both public and private sectors in the endeavours towards the recovery of the tourism sector. Likewise, one could encourage initiatives coming directly from the private sector as innovation or investments for the recovery of tourism. Besides, there are plenty of data available to capitalize in order to ensure a smart and sustainable recovery of the sector. A modest part is present in Annex V of this report.

Furthermore, to the question “Do you consider that ETC programs (Interreg) and their common transversal objectives should be adapted about COVID-19 recovery?” close to 85% of responses indicated “Yes.” Should such initiatives be implemented, and as per the nature of ETC programs themselves, it will therefore be instrumental to involve regional authorities in the reflections and co-design of the measures to be developed on this scale.

Beyond the question of instruments and measures, some reflections could be added on the typology of tourism to be developed in the future, serving the recovery of the sector. Indeed, coastal areas are usually the most attractive areas for tourists in the Mediterranean, which can cause great pressures
on coastal areas and communities. However, this unusual 2020 year and Summer season have seen a greater interest from tourists for natural areas located further away from beaches, probably to avoid clusters of people and stay healthily safer. This trend seems to be a good encouragement to keep promoting alternative itineraries for tourists, via the adaptation of natural sites to a new type of tourism centred around the experience offered to tourists, while raising awareness on the importance of preserving those natural areas.

Last but not least, another perspective that needs to be considered by all partaking actors for the safety of tourism in our times is the development of local opportunities also serving the evolution of the touristic experience. This could mean an increase in local consumption of products, i.e. farm-to-fork networks, and a better governance in the exploitation of local distribution, therefore also contributing to some areas identified as key to fulfil the objectives of the EU Green Deal.
Conclusion

The unprecedented situation related to the outbreak of COVID-19 that the world has been experiencing has forced the whole international community to reflect on how to effectively and promptly support and accelerate its short, medium and long-term socio-economic recovery. In this context, the tourism sector could and should play a key role, considering its great contribution to socio-economic development and prosperity.

Indeed, tourism has got an outstanding opportunity to re-think its offers for an improved, more sustainable, inclusive and socially responsible tourism economy articulated around the three main pillars of sustainability: economic, social and environmental. Numerous studies, pilot actions and incentives have been developed in that sense, and their capitalization and mainstreaming in multi-level governance policies is key to optimise resources and still ensure a smart and sustainable recovery of the sector.

Several responses have been thought at international and European institutional levels, including design and adaptation of EU instruments and funds, and their respective specific implementation through programs or facilities involving the Member States. This, in view to tackle the aftermath of the COVID-19 crisis but hopefully without leading astray the EU’s primary goals for this new programming period embodied in the Green Deal, and more broadly responding to the UN Agenda for 2030.

Recovery of the sector will nonetheless not be fully effective if there is no concerted action including local and Regional authorities in the design and implementation of these common solutions, whether it be at EU or national levels. As the CPMR Intermediterranean Commission’s survey reminded, Mediterranean regions have expressed concerns regarding the financial situation for all professional actors of the industry. Regional and financial support has been made available to most businesses, from privately owned micro-enterprises to SMEs and international firms, but there are still some discrepancies between territories as Regions sometimes are confronted to different structural situations, which their capacity to answer to such challenges clearly depends on.56

In that sense, regions have expressed the necessity of more coordination between European, national and regional authorities, as well as an increased flexibility in procedures in order to reach both regional and national recovery goals. In addition, the support of European and Mediterranean institutions and stakeholders from the private sector is highly requested by Regions in the framework of relaunch plans, whether it be through the form of grants, governance policy schemes and recommendations for plans of actions.

To this end – based on the valuable work carried out in the last years and in line with the valuable insights collected and analysed in this study, some priority actions to progress and build a more resilient tourism could be summed as below:

1. **There is a strong need for a new model for tourism** and the crisis is an opportunity to accelerate the transition to new business and participatory multilevel governance models,

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56 As well-known example could be that of seasonality. As a matter of fact, the winter season usually knows a natural decrease in touristic activity due to weather conditions. The survival of businesses depends on the financial support which will help them prepare for the next season and allow a relaunch of their activities in the best possible conditions for both tourists and professional actors.
through coordination and multi-stakeholder partnerships, cross-sector collaborations, public-private alliances, ensuring at the same time a proper skills development and the necessary co-evolution of human activities and natural systems.

2. **It is crucial to get a connected response to this crisis from international to local level.** This means that in the new model, local and regional authorities should be at the heart of travel and tourism planning in terms of the design, management and implementation of funds and related decision-making.

3. **Investing in a smart and sustainable recovery is fundamental.** Proper financing mechanisms are needed to enable the transition to new tourism models that are fully sustainable in all three meanings of the concept: economically, socially and environmentally speaking. For example, through the development of green infrastructures, smart mobility, sustainable innovation, digitalisation, secured and safe employment, skills, youth, women and elders’ inclusion, etc.

In this sense, the EU recovery plans can constitute a concrete response to the current crisis, but the sustainability components of any proposed actions and recovery incentives and projects should be central. Without a proper focus of recovery measures on tourism’s sustainability on the short-term already, the fulfilment of sustainability on the medium- and longer terms might be even more delayed, hence hindering the sector’s capacity to contribute to the global objectives of the EU Green Deal and the 2030 Agenda / Sustainable development goals already through its recovery and beyond. Working on these sustainability dimensions from the various steps towards recovery could ensure a much stronger resilience of businesses on the medium and longer terms, while a balance in accordance to these principles should be found to ensure their survival on the shorter term.

*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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