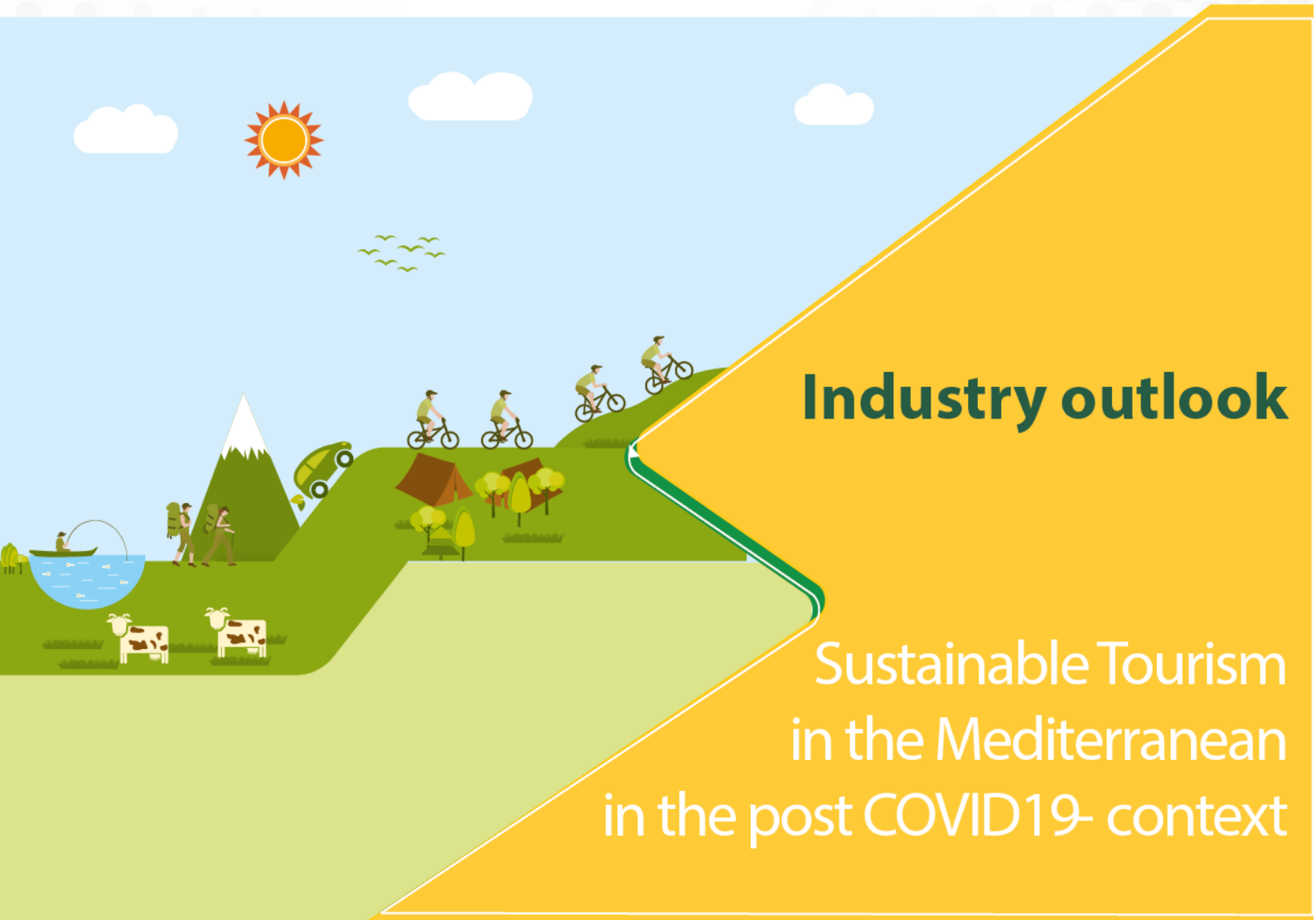




Project  
funded by the  
EUROPEAN UNION

**EBSOMED**  
ENHANCING BUSINESS SUPPORT ORGANISATIONS

# Sector Strategic Paper



## Industry outlook

### Sustainable Tourism in the Mediterranean in the post COVID19- context

This document is produced by



ASCAME

ASSOCIATION DES CHAMBRES DE COMMERCE ET D'INDUSTRIE DE LA MEDITERRANEE  
ASSOCIATION OF THE MEDITERRANEAN CHAMBERS OF COMMERCE AND INDUSTRY  
جمعية غرف التجارة والصناعة للبحر الأبيض المتوسط

**Cámara**  
Málaga



Project  
funded by the  
**EUROPEAN UNION**

**EBSOMED**  
ENHANCING BUSINESS SUPPORT ORGANISATIONS

# Sector Strategic Paper

Industry outlook: Sustainable Tourism in the  
Mediterranean in the post COVID-19 context

Esther Martínez Reyes

Iván Cortés Gómez

Chamber of Commerce, Industry, Services and Navigation of  
Malaga

## INDEX

1. Introduction	4
1.1 Objectives	5
a) EBSOMED Project	5
b) Study objectives	6
1.2 Methodology	6
1.3 Definition of Sustainable Tourism	7
1.4 Sustainable Development Goals in the Mediterranean region	15
2. COVID-19 situation	22
2.1 Possible recovery scenarios	31
2.2 Main Recommendations for Economic Recovery	34
3. Situation of tourism and sustainable tourism in the Mediterranean	37
3.1. Key data on the tourism sector in the Europe, Africa and Middle East regions	37
3.2 Overview of the tourism sector in the countries of the Mediterranean area	43
3.3 Main tourism segments and trends in Mediterranean countries	45
3.4 Main initiatives, challenges and niches in sustainable tourism	48
3.5 Main results of the "Sector Alliance Committee" of the tourism sector	57
4. Key Sustainable Tourism Initiatives and Institutions	62
5. Focus on foreign direct investment in the tourism sector in the Mediterranean	67
6. Latest trends and profiles of the responsible tourist	71
7. Recommendations and conclusions	74
Recommendations at Mediterranean level	74
Recommendations on tourist destinations (country or region)	75
Recommendations at the business level	76
Conclusion	77
8. Bibliography	80

# 1. Introduction

The role of the tourism sector worldwide, and specifically at the level of the Mediterranean region, is indisputable.

In 2019, there were almost 1.500 million international arrivals in the world, with a sustained growth of the last 10 years. This activity generated 1.7 trillion US dollars, being the 3rd export item and representing 50% of the exports of some emerging countries. According to the latest available data, **the tourism sector represents about 10% of GDP worldwide** (direct, indirect, and induced impacts). Besides, the tourism sector generates 1 out of 11 jobs worldwide, a high percentage of these jobs are covered by women and young people. All of the mentioned above makes tourism a **key economic sector** in many world economies, and even more so in emerging countries.

In the Mediterranean region, the number of international arrivals reached 406 million travellers, which indicates that more than **28% of world international arrivals choose the Mediterranean** to travel. More so, the region has experienced an average growth ratio of 4.8% in the last 10 years. **On average, tourism contributes about 15.31% of the GDP in the Mediterranean countries**, which highlights the importance that the tourism sector has in the economies of the region.

Unfortunately, the consequences of the global pandemic caused by the COVID-19, which began in 2020, seriously affected the tourism sector worldwide. Reducing activity to a minimum and dramatically impacting the development and evolution of companies, jobs, and tourist destinations.

Regardless of the consequences that this pandemic is provoking, due to the important contribution of the sector in the economies of the region, both negative and positive, **the most important institutions worldwide identify the development of Sustainable Tourism as the only opportunity** that the tourism sector has to recover from the current situation and ensure its future viability.



On the other hand, there is an **upward trend of tourists interested in minimizing their impact on the environment** demanding initiatives and sustainable management of the tourist destinations they visit.

This study aims to analyse the current state of sustainable tourism in Mediterranean countries, study the possibilities for improvement and provide recommendations for public and private entities to position the Sustainable Tourism Destination of the Mediterranean. Moreover, this study makes a review of the organisations and initiatives that are available and summaries the good practices that destinations and companies that are committed to sustainability are implementing.

## 1.1 Objectives

This study has been elaborated by the Official Chamber of Commerce, Industry, Navigation and Services of Malaga, as an affiliate member of the EBSOMED project (Enhancing Business Support Organizations and Business Networks in the Southern Neighborhood), within the framework of the EUROPAID program co-financed by the European Commission.

### a) EBSOMED Project

This 4-year project (2018-2022) aims to stimulate the Mediterranean business ecosystem, promote inclusive economic development, and boost investment and job creation through the strengthening of Business Support Organizations (BSOs) in neighboring countries of the South of the Mediterranean.

More specifically, EBSOMED will improve the management capacity of business support organizations (BSOs) in the Euro-Mediterranean area by improving services for SMEs.

The objectives of EBSOMED are:

- Optimize the performance and competitiveness of business support organizations in the Euro-Mediterranean region by improving the services offered to their members.

- Revitalize business networks by establishing regional platforms and promoting new bilateral and multilateral partnerships between the EEs of the North and those of the Southern Mediterranean.
- Develop a regional strategy and action plans around high added value and employment generating sectors of activity.
- Strengthen the Institutional Association between the European Union and the neighboring countries of the southern Mediterranean and consolidate the South-South Cooperation Mechanisms.
- Improve the image of the Southern Mediterranean countries through a more structured public-private partnership and the dissemination of good practices in the region.
- Increase trade and stimulate investment in the Mediterranean region.
- Guarantee the viability of EU-funded projects through greater visibility and synergy with regional and national cooperation initiatives.

## **b) Study objectives**

This study aims to analyse the importance and evolution of tourism worldwide, and specifically in the Mediterranean region, highlighting the relevance of the tourism sector in each of the countries, as well as the current situation in each of them concerning the implementation of sustainable tourism and the Sustainable Development Goals (SDGs).

It also aspires to present the tools that destinations, institutions, and companies in the Mediterranean region have at their disposal to develop sustainable management of tourist destinations.

Finally, the study includes a series of recommendations and conclusions aimed at tourism institutions, destinations, and companies in the Mediterranean region to build a sustainable Mediterranean tourist destination.

## **1.2 Methodology**

To carry out an exhaustive analysis of Sustainable Tourism in the Mediterranean, several sources of important value have been used. On the

one hand, the information provided by institutions and official bodies that generate information on tourism in general, and on sustainable tourism in particular, including the World Tourism Organisation (WTO), the Organisation for Economic Cooperation and Development (OECD), the Sustainable Development Solutions Network (SDSN), the European Commission and official national sources of the countries under this study.

Also, the information provided by the panel of Mediterranean experts meeting at the Sector Alliance Committee: “Towards an action plan on sustainable tourism for the Mediterranean in the post-COVID context”, held on 17 December 2020 in the framework of the EBSOMED project has been also taken into consideration.

Moreover, the results of the survey carried out by the Association of Mediterranean Chambers of Commerce and Industry (ASCAME) on the current tourism situation in the Mediterranean countries, as well as the measures being taken by the countries in response to the pandemic, and the tourism and sustainable tourism policies being developed in the countries of the region were also reflected in this study.

Consequently, all this information has been analysed to present a series of recommendations and conclusions that the Mediterranean countries should work on to make the Mediterranean a sustainable tourist destination.

### 1.3 Definition of Sustainable Tourism

In 1995, UNESCO, the World Tourism Organisation, and other international organisations organised the first International Summit on Sustainable Tourism, during which the World Charter for Sustainable Tourism was approved. This document introduced the model of sustainable tourism.

According to the World Tourism Organisation, Sustainable Tourism is defined as “Tourism that takes full account of current and future economic, social and environmental impacts to meet the needs of visitors, the industry, the environment, and host communities”.

Sustainable tourism is not a segment of tourism nor a multi-segment typology of tourism. Sustainable management practices can be applied in all types of destinations, mature or emerging, as well as in all types of tourism segments. The pillars of sustainable tourism are the following: Environmental Aspect, Socio-cultural Aspect, and Economic Aspect.

Among the positive effects of the development of sustainable tourism, there are economic impacts such as increased employment and income, public and private investments; environmental impacts such as greater environmental awareness, the fight against pollution, or the need to conserve natural areas; and finally, social impacts such as the generation of employment, infrastructures or improvements aimed at tourism that benefit the local population or the valuation of local culture and craftsmanship.

In the contrasts, tourism can also generate negative effects, including economic impacts such as inflation, unequal working conditions, unbalanced income distribution, environmental impacts such as the destruction of natural areas, air, water, and soil pollution, or the impact on the landscape and, finally, social impacts such as the loss of culture and traditions, drastic changes in the local population, or the overexploitation of cultural and natural resources.

Sustainable destination management involves maximising the positive economic, social and environmental effects, and minimising the negative effects derived from the possible excess of tourists in certain parts of countries or regions, or at certain times of the year, to generate comprehensive sustainable growth, both for the industry and the environment.

With the lessons learned from the establishment of the Millennium Development Goals (MDGs), approved in 2000, in 2015 the United Nations approved the 2030 Agenda for Sustainable Development and with it, the Sustainable Development Goals (SDGs), a framework composed of 17 goals and 169 targets, through which states, civil society, and the private sector

can guide and measure their contributions to sustainable development until 2030.

The Sustainable Development Goals of the 2030 Agenda for Sustainable Development are:



Source: United Nations

The new development agenda is the most ambitious to date as its 17 Goals aim to eradicate poverty, protect the planet, and ensure equality and prosperity for all.

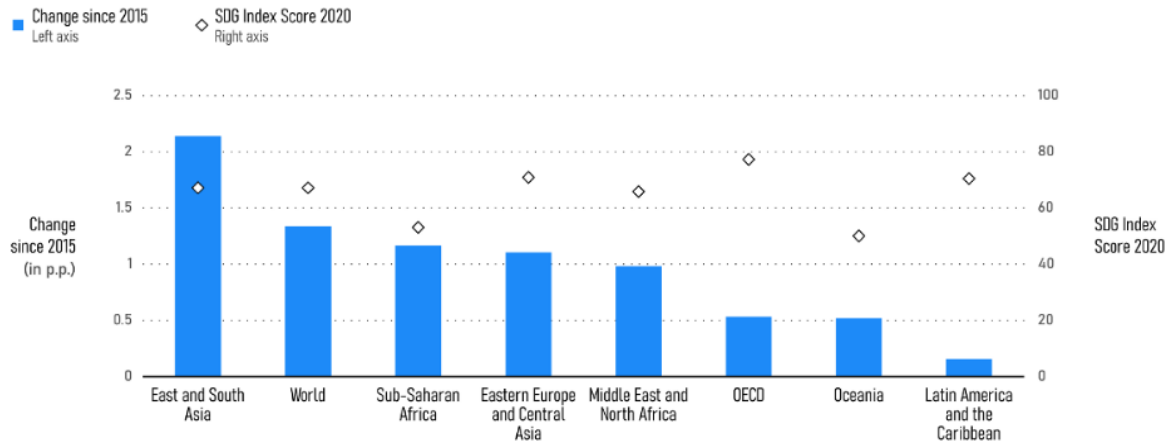
To establish a baseline diagnosis, as well as to be able to monitor progress towards the SDGs, a system of indicators was created to link the goals and targets.

It is observed that the evolution in the achievement of the SDGs, measured by the SGD Index, from 2015 to 2019, has been uneven among the different regions of the world, as shown in the following graph (the degree of fulfilment of the SDGs in each country will be analysed further on in this study):



### The Covid-19 crisis should not dismantle the SDG efforts and momentum that have taken place since their adoption in 2015

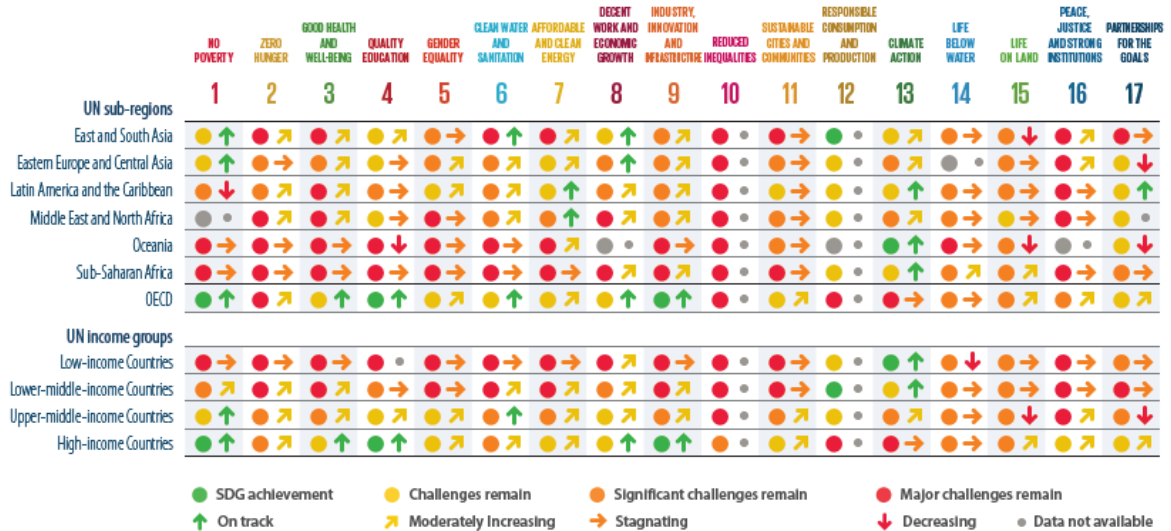
Progress on the SDG Index by region (2015-2019)



Source: Sachs et al., 2020. See section 2 for more details.

Source: The Sustainable Development Goals and COVID-19. Sustainable Development Report 2020

Also, as the table below shows, the achievement of the SDGs differs according to the level of income of the countries:



Note: Excluding OECD specific indicators. Population-weighted averages. Source: Authors' analysis

Source: The Sustainable Development Goals and COVID-19. Sustainable Development Report 2020

Tourism, as indicated above, due to its size, growth, potential for job creation, exchange, impacts, etc., is one of the most dynamic and far-reaching sectors and can make a decisive **contribution to the achievement of the SDGs**. Likewise, the development of certain SDGs can contribute to the improvement of sustainable tourism destinations.

As analysed in the following table, the tourism sector can contribute directly or indirectly to each of the 17 Sustainable Development Goals (SDGs). Not only that, but it also appears in the Targets of the following goals: Goal 8: Decent Work and Economic Growth, Goal 12: Responsible Consumption and Production, and Goal 14: Marine Life.

Besides, the tourism sector, to comply with the 2030 Agenda and the SDGs, involves all stakeholders: tourism destinations that must work on the integration of the SDGs, companies and entities, research centres, as well as tourists and citizens on the commitment to sustainability.

In the table below there is a detailed explanation of the 17 Sustainable Development Goals, the contribution that the tourism sector can make to each of them, as well as some practices that companies and/or destinations can implement concerning these goals. This analysis tries to illustrate the applicability that tourism can bring to the different SDGs.

SDG Objective - Sustainable Development Agenda 2030	Tourism's contribution to each SDG	Practices in each SDG of the Tourism Sector
SDG 1. End poverty in all its forms everywhere	Due to its growth and contribution, tourism is well positioned to foster economic growth and development at all levels and to provide income through job creation, especially in developing countries. But attention to the negative effects of possible socio-economic shocks need to be maintained.	Decent working conditions for employees throughout the value chain. Training and recruitment in local communities Equality policies in the company
SDG 2. End hunger, achieve food security and improved nutrition and	Tourism should promote sustainable agriculture and use of local products.	Collaborative projects focused on developing local economies



<p>promote sustainable agriculture</p>	<p>Avoid substitution of land for tourism use, to prevent the excessive increase of prices related to agricultural products.</p>	<p>Decent working conditions for employees throughout the value chain.  Equality policies in the company</p>
<p>SDG 3. Ensure healthy lives and promote well-being for all at all ages</p>	<p>The development of tourism often leads to the establishment of health structures in destinations, but also brings with it the danger of resource scarcity or changing lifestyles.</p>	<p>Promote the development of the places where the company operates.  Promote awareness among travellers and tourists  Establish health and safety measures</p>
<p>SDG 4. Ensure inclusive, equitable and quality education and promote lifelong learning opportunities for all</p>	<p>The development of sustainable tourism requires the capacitation of all the actors involved in sustainable practices.  Tourism can provide incentives to invest in education and training of citizens.</p>	<p>Cooperation projects focused on the development of local economies.  Management models and good business practices  Capacity building in sustainability practices.</p>
<p>SDG 5. Achieve gender equality and empower all women and girls</p>	<p>Tourism has a high percentage of women employees and entrepreneurs and is an important tool for empowerment. But it should be an objective to strengthen women's leadership and participation in decision-making.</p>	<p>Promote the development of the places where the company operates.  Equality policies in the company</p>
<p>SDG 6. Ensure availability and sustainable management of water and sanitation for all</p>	<p>Tourism can play a crucial role in achieving responsible access to water resources but at the same time, the tourist competes with local communities for the availability of this resource and it can be a determining factor in water pollution.</p>	<p>Sustainable water management in the management of the company, avoiding pollution  Sustainable management and protection of marine and coastal habitats.</p>
<p>SDG 7. Ensure access to affordable, reliable, sustainable and modern energy for all</p>	<p>Tourism is a sector that requires substantial energy consumption and it can contribute to ensuring and promoting universal access to clean, smart and modern energy services by improving efficiency and substantially increasing the use of renewable sources..</p>	<p>Establish energy saving and efficiency measures in the company's activities.  Implement management systems certified according to international standards.</p>
<p>SDG 8. Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all</p>	<p>Tourism can be a powerful tool to achieve prosperity and reduce inequality if it involves the local population and all key actors. The problem can arise in the quality of the jobs created and the distribution of the wealth generated at the destination level.</p>	<p>Decent working conditions for employees along the value chain  Encourage recruitment and training of employees, especially young people, from local communities.  Promote social responsibility in the supply chain.</p>



		Development of a company code of ethics
SDG 9. Build resilient infrastructure, promote inclusive and sustainable industrialization and foster innovation	Tourism must put at the service of local communities its capacity to attract resources for the realisation of structures and infrastructures at the disposal of tourists and residents. But such projects need to be planned and implemented given priority to the local communities' welfare.	Invest in facilities, technology and transport that benefit tourists and locals.  Integrate people with disabilities by removing barriers.
SDG 10. Reduce inequality within and among countries	The elimination of barriers to achieve inclusion by incorporating equality criteria in all its aspects and promoting new forms of tourism with a vision of social guarantees.	Cooperation projects focused on the development of local economies.  Provide decent working conditions
SDG 11. Make cities and human settlements inclusive, safe, resilient and sustainable	This can have a double impact on the sustainability of cities and communities. On the one hand, tourism can be a motivation for public entities to invest in structures and infrastructure, but on the other hand, the increasing population fluctuation can accelerate the problems that crowded cities have to deal with.	Invest in facilities, technology and transport that benefit tourists and locals alike.  Include the use of new technologies  Integrate policies and measure to include people with disabilities
SDG 12. Ensure sustainable consumption and production patterns	Promote a shift from a tourism based on consumption to satisfy needs, to tourism based on experiences through relationships and interaction with the local communities and other non-material products. Cooperate with producers to strengthen local and sustainable production of goods and services and assure dignified working conditions, and redistribution of wealth.	Promote awareness among travellers to turn sustainability into a value attribute in the choice of destination.  Raise awareness of responsible production and consumption patterns.
SDG 13. Take urgent action to combat climate change and its impacts	Tourism contributes to climate change as the sector is highly dependent on and affected by energy consumption and in particular energy from fossil fuels. Tourism plays a leading role in the global response to climate change.	Manage sustainably and protect habitats  Implement internationally recognised and certified management systems.
SDG 14. Conserve and sustainably use the oceans, seas and marine resources for sustainable development	The tourism sector is highly dependent on the health of marine ecosystems, and the development of tourism, in turn, has an ecological impact on coasts. Tourism development in marine destinations should be a part of integrated coastal zone management in order to help conserve and preserve ecosystems.	Manage habitats in a sustainable way ensuring its protection in the long term  Implement internationally certified management systems  Actions aimed at tourists and locals to raise environmental awareness.

<p>SDG 15. Protect, restore and promote sustainable use of terrestrial ecosystems, sustainably manage forests, combat desertification, and halt and reverse land degradation and halt biodiversity loss</p>	<p>Nature-based tourism has grown the most in recent years. Tourism development has negative impacts through habitat destruction and pollution of various kinds. Therefore, in tourism, strategies and measures concerning the prevention of negative impacts especially in relation to waste and destruction of the ecosystem, conservation and restoration should be adopted.</p>	<p>Measures aimed at tourists and locals to raise environmental awareness</p> <p>Promote awareness among travellers to make sustainability a valuable attribute in the choice of destination.</p>
<p>SDG 16. Promote peaceful and inclusive societies for sustainable development, provide access to justice for all and build effective, accountable and inclusive institutions at all levels</p>	<p>Mainly due to the diversity of interests of governments, companies and population, sustainable tourism actions must be framed within a model of participatory, inclusive and sustainable governance of the destination; and promotion of the culture of peace and intercultural dialogue in the destinations.</p>	<p>Develop a company code of ethics</p> <p>Decent working conditions for employees throughout the value chain.</p>
<p>ODS 17. Strengthen the means of implementation and revitalize the global partnership for sustainable development</p>	<p>Tourism, thanks to its cross-sectoral nature, can strengthen public-private partnerships and involve multiple stakeholders in order to contribute to the SDGs. Building alliances for tourism sustainability between territories and destinations, aimed at revitalising the Global Partnership for Sustainable Development, is the guideline in the development of this objective.</p>	<p>Create public-private partnerships with society, universities, the public sector and companies to carry out projects that contribute to the development of sustainable tourism</p>

Source: Own elaboration based on "The tourism sector and the Sustainable Development Goals" and Guide to Sustainable Tourism. Challenges for the tourism sector in the face of the 2030 Agenda".

About the analysis of tourism activity and its relationship with the Sustainable Development Goals, and according to the study "Guide to Sustainable Tourism. Challenges for the tourism sector in the face of the 2030 Agenda", the following conclusions stand out:

- The tourism development model based mainly on increasing the number of tourists and revenues is not contributing to the shift towards sustainability and the achievement of the *Sustainable Development Goals*.
- Besides, the development of the current unsustainable tourism model in many countries means that the greater the tourism development,

the greater the impact on the biodiversity of the forest, terrestrial and marine ecosystems.

- Countries that implement real environmental sustainability policies for their territory show a higher degree of compliance with the SDGs. In this sense, the Goals of responsible consumption (SDG 12), climate action (SDG 13), conservation of terrestrial ecosystems (SDG 15), and partnerships to implement the 2030 Agenda (SDG 17) are shown to be the SDGs that contribute most to the sustainability of tourism destinations.
- Finally, the analyses show that the fact that a country is committed to the development of measures to improve safety (SDG 16), equality (SDG 10), and infrastructure (SDG 9) directly influences the attraction of a greater number of tourists and, therefore, an increase in the revenue generated by this activity.

UNWTO Secretary-General Zurab Pololikashvili recently stated: "Sustainability must no longer be a niche in tourism, but must be the new norm in every segment of the sector. It is one of the core elements of our Global Guidelines to restart tourism. It is in our hands to transform tourism and to transform this pandemic into a turning point for sustainability."

#### 1.4 Sustainable Development Goals in the Mediterranean region










This section shows in a series of graphs and images the situation in which each of the countries that conform to the Mediterranean region finds itself, in terms of the level of compliance with the Sustainable Development Goals (SDGs).

In this way, it is possible to visualise both the progress that has been made and in which greater efforts have been made, as well as the challenges and aspects in which there is room for improvement.

The graph below shows the ranking of the countries according to the score obtained in the SDG INDEX Score, which is an index that indicates the degree of compliance with the SDGs by the countries. While it is true that

the countries on the northern shore of the Mediterranean engage better positions in this ranking (France, Croatia, Spain, Italy, Serbia, Cyprus, Bulgaria, Greece, Bosnia & Herzegovina), the countries on the southern shore are not far behind and obtained very good scores (Algeria, Tunisia, Morocco, Egypt, etc.):

**Table 2**  
The 2020 SDG Index scores

	Rank	Country	Score	Rank	Country	Score
	1	Sweden	84.7	43	Greece	74.3
	2	Denmark	84.6	44	Luxembourg	74.3
	3	Finland	83.8	45	Uruguay	74.3
	4	France	81.1	46	Ecuador	74.3
	5	Germany	80.8	47	Ukraine	74.2
	6	Norway	80.8	48	China	73.9
	7	Austria	80.7	49	Vietnam	73.8
	8	Czech Republic	80.6	50	Bosnia and Herzegovina	73.5
	9	Netherlands	80.4	51	Argentina	73.2
	10	Estonia	80.1	52	Kyrgyz Republic	73.0
	11	Belgium	80.0	53	Brazil	72.7
	12	Slovenia	79.8	54	Azerbaijan	72.6
	13	United Kingdom	79.8	55	Cuba	72.6
	14	Ireland	79.4	56	Algeria	72.3
	15	Switzerland	79.4	57	Russian Federation	71.9
	16	New Zealand	79.2	58	Georgia	71.9
	17	Japan	79.2	59	Iran, Islamic Rep.	71.8
	18	Belarus	78.8	60	Malaysia	71.8
	19	Croatia	78.4	61	Peru	71.8
	20	Korea, Rep.	78.3	62	North Macedonia	71.4
	21	Canada	78.2	63	Tunisia	71.4
	22	Spain	78.1	64	Morocco	71.3
	23	Poland	78.1	65	Kazakhstan	71.1
	24	Latvia	77.7	66	Uzbekistan	71.0
	25	Portugal	77.6	67	Colombia	70.9
	26	Iceland	77.5	68	Albania	70.8
	27	Slovak Republic	77.5	69	Mexico	70.4
	28	Chile	77.4	70	Turkey	70.3
	29	Hungary	77.3	71	United Arab Emirates	70.3
	30	Italy	77.0	72	Montenegro	70.2
	31	United States	76.4	73	Dominican Republic	70.2
	32	Malta	76.0	74	Fiji	69.9
	33	Serbia	75.2	75	Armenia	69.9
	34	Cyprus	75.2	76	Oman	69.7
	35	Costa Rica	75.1	77	El Salvador	69.6
	36	Lithuania	75.0	78	Tajikistan	69.4
	37	Australia	74.9	79	Bolivia	69.3
	38	Romania	74.8	80	Bhutan	69.3
	39	Bulgaria	74.8	81	Panama	69.2
	40	Israel	74.6	82	Bahrain	68.8
	41	Thailand	74.5	83	Egypt, Arab Rep.	68.8
	42	Moldova	74.4	84	Jamaica	68.7



Rank	Country	Score	Rank	Country	Score
85	Nicaragua	68.7	126	Syrian Arab Republic	59.3
86	Suriname	68.4	127	Senegal	58.3
87	Barbados	68.3	128	Côte d'Ivoire	57.9
88	Brunei Darussalam	68.2	129	The Gambia	57.9
89	Jordan	68.1	130	Mauritania	57.7
90	Paraguay	67.7	131	Tanzania	56.6
91	Maldives	67.6	132	Rwanda	56.6
92	Cabo Verde	67.2	133	Cameroon	56.5
93	Singapore	67.0	134	Pakistan	56.2
94	Sri Lanka	66.9	135	Congo, Rep.	55.2
95	Lebanon	66.7	136	Ethiopia	55.2
96	Nepal	65.9	137	Burkina Faso	55.2
97	Saudi Arabia	65.8	138	Djibouti	54.6
98	Trinidad and Tobago	65.8	139	Afghanistan	54.2
99	Philippines	65.5	140	Mozambique	54.1
100	Ghana	65.4	141	Lesotho	54.0
101	Indonesia	65.3	142	Uganda	53.5
102	Belize	65.1	143	Burundi	53.5
103	Qatar	64.7	144	Eswatini	53.4
104	Myanmar	64.6	145	Benin	53.3
105	Honduras	64.4	146	Comoros	53.1
106	Cambodia	64.4	147	Togo	52.7
107	Mongolia	64.0	148	Zambia	52.7
108	Mauritius	63.8	149	Angola	52.6
109	Bangladesh	63.5	150	Guinea	52.5
110	South Africa	63.4	151	Yemen, Rep.	52.3
111	Gabon	63.4	152	Malawi	52.2
112	Kuwait	63.1	153	Sierra Leone	51.9
113	Iraq	63.1	154	Haiti	51.7
114	Turkmenistan	63.0	155	Papua New Guinea	51.7
115	São Tomé and Príncipe	62.6	156	Mali	51.4
116	Lao PDR	62.1	157	Niger	50.1
117	India	61.9	158	Dem. Rep. Congo	49.7
118	Venezuela, RB	61.7	159	Sudan	49.6
119	Namibia	61.6	160	Nigeria	49.3
120	Guatemala	61.5	161	Madagascar	49.1
121	Botswana	61.5	162	Liberia	47.1
122	Vanuatu	60.9	163	Somalia	46.2
123	Kenya	60.2	164	Chad	43.8
124	Guyana	59.7	165	South Sudan	43.7
125	Zimbabwe	59.5	166	Central African Republic	38.5

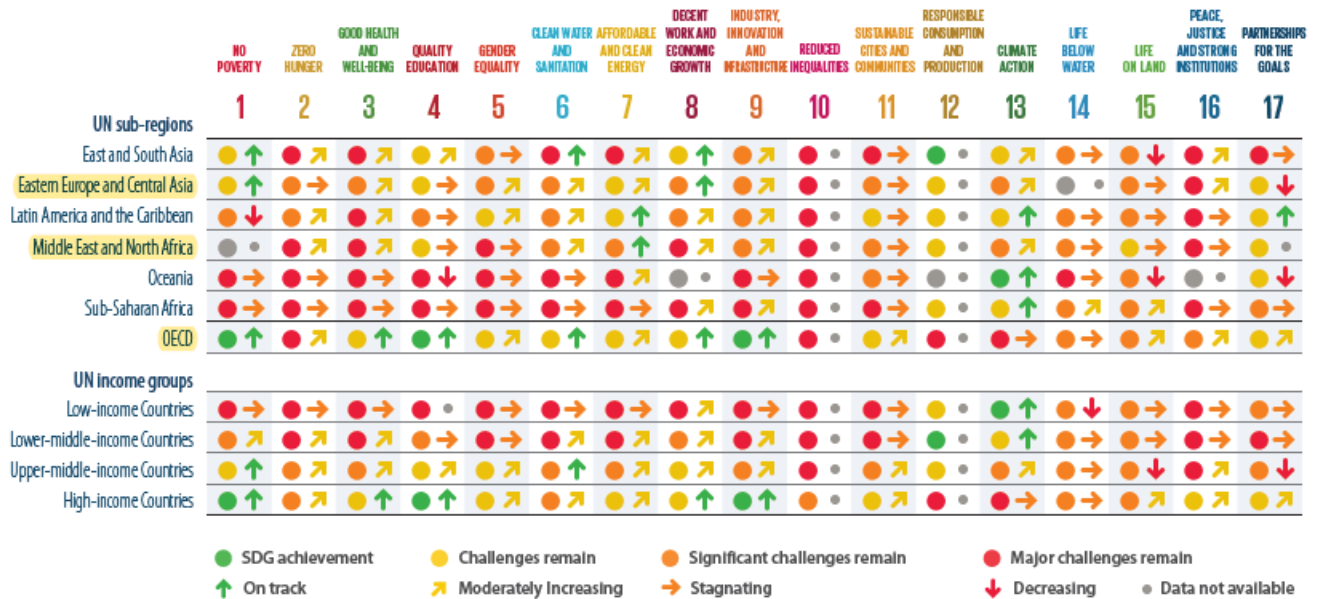


Resource: The Sustainable Development Goals and COVID-19. Sustainable Development Report 2020

Below, we can see a table with a comparison of the degree of compliance with the 17 SDGs by world region, as well as the evolution and trends experienced by each region:

Figure 12

2020 SDG dashboards (levels and trends) by United Nations sub-regions and income groups



Note: Excluding OECD specific indicators. Population-weighted averages. Source: Authors' analysis

Resource: The Sustainable Development Goals and COVID-19. Sustainable Development Report 2020

In Eastern Europe and Central Asia region, major advances have been made on goals 1 and 8, poverty eradication and sustained economic growth respectively. Significant progress has also been made on goals 3, 5, 6, 7, 9, 13 and 16.

The Middle East and North Africa region has performed very well in terms of meeting goal 7, access to affordable, reliable, sustainable and modern energy. It has also performed positively on goals 2, 3, 6, 8, 8, 9 and 13.

Concerning the OECD countries, it is worth saying that goals 1, 4 and 9 are currently being met, with significant progress on goals 3, 4, 6 and 8.

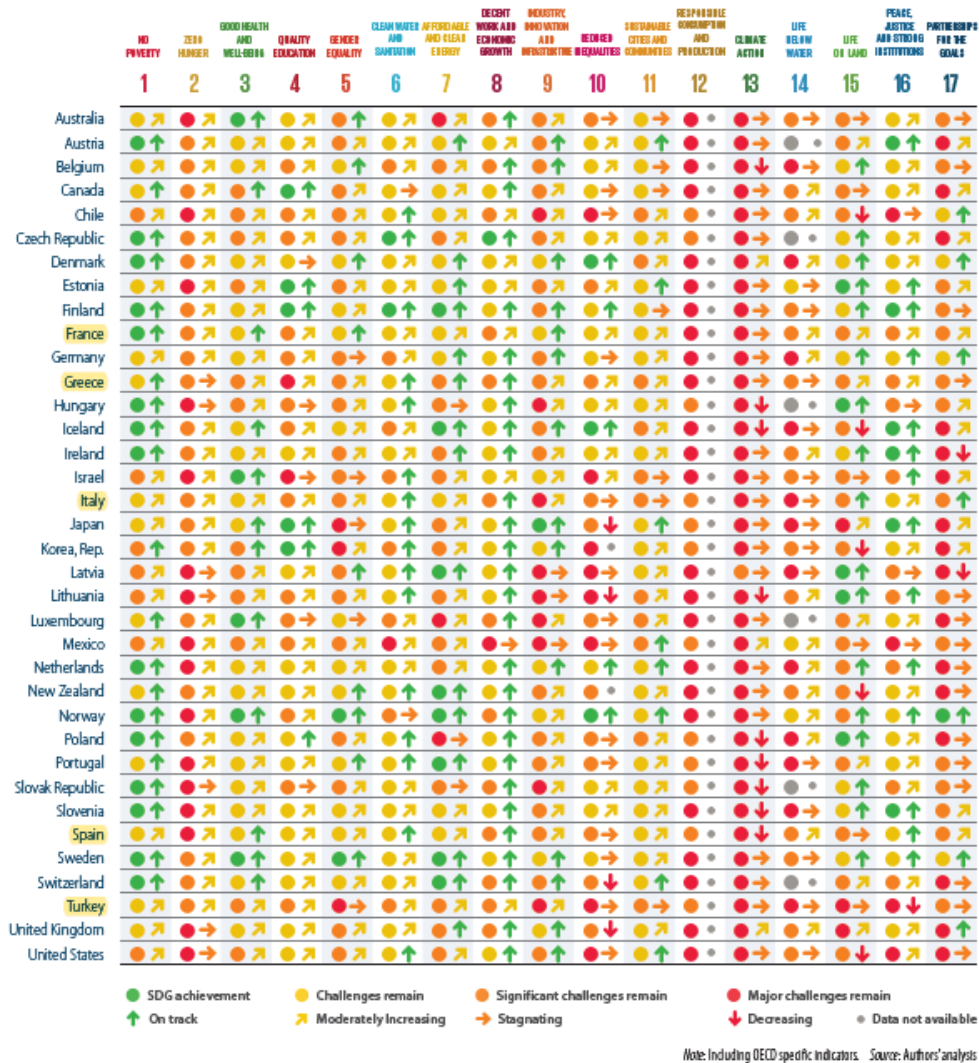
The graph below shows the degree of compliance with each SDG by country, with those belonging to the Mediterranean region indicated in yellow.





Within this block of Mediterranean countries belonging to the OECD, we can observe the significant improvements achieved by France, Greece, Italy and Spain (each of these countries has 4 indicators in green and most of them in progress) in the fulfilment of the Sustainable Development Goals, as well as the notable gains that Turkey has been experiencing (with several indicators in progress).

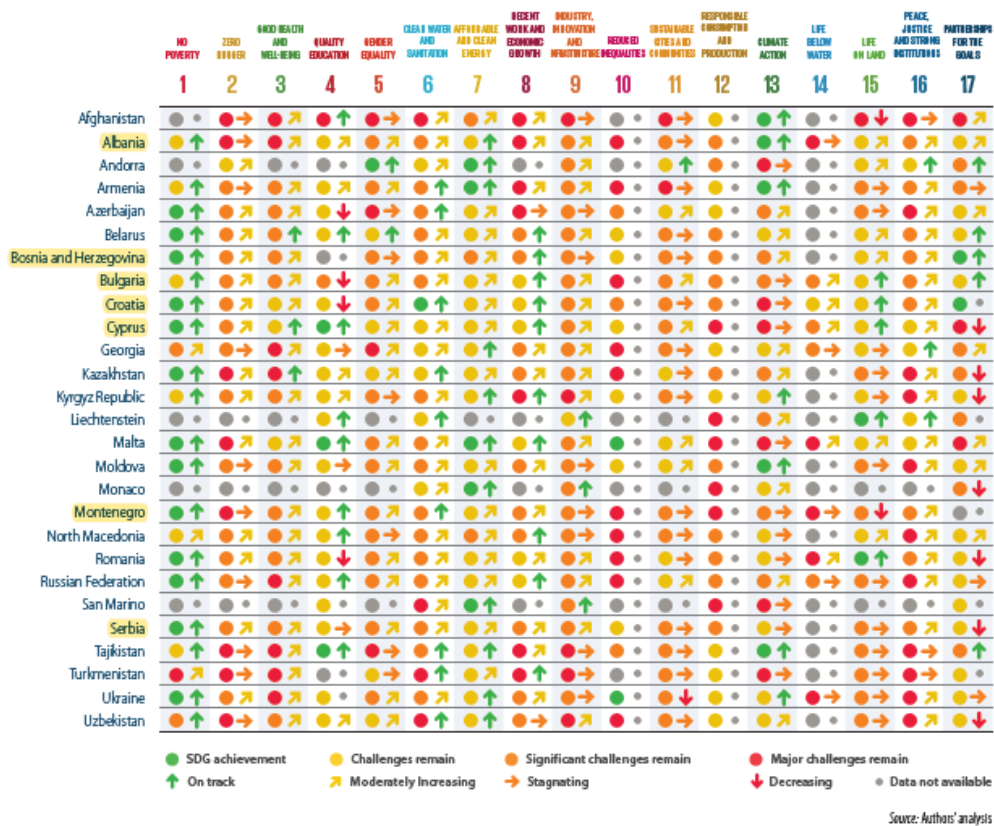
**Figure 14**  
2020 SDG dashboards (levels and trends) for OECD countries



Source: Sustainable Development Report 2020.

About the Mediterranean countries in Eastern Europe and Central Asia bloc, there has been a significant improvement in terms of objectives 1 and 8, although there are also other objectives with a good upward trend. These countries are Albania, Bosnia & Herzegovina, Bulgaria, Croatia, Cyprus, Montenegro and Serbia.

Figure 15  
2020 SDG dashboards (levels and trends) for Eastern Europe and Central Asia



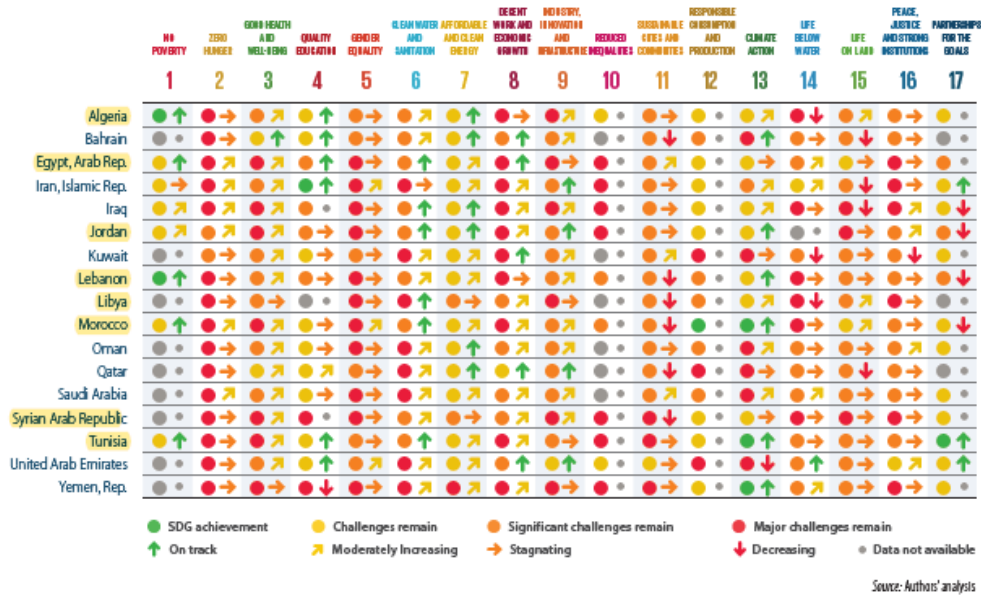
Source: Sustainable Development Report 2020.

Finally, regarding the Mediterranean countries in the Middle East and North Africa region, i.e. Algeria, Egypt, Jordan, Lebanon, Libya, Morocco, Syria and Tunisia, it is worth highlighting the significant progress made by most of them, but especially in terms of eradication of poverty, goal number 1. They also have a significant overall positive evolution in the fulfilment of goals 3, 4, 6 and 7.





**Figure 17**  
2020 SDG dashboards (levels and trends) for the Middle East and North Africa



Source: Sustainable Development Report 2020.

## 2. COVID-19 situation

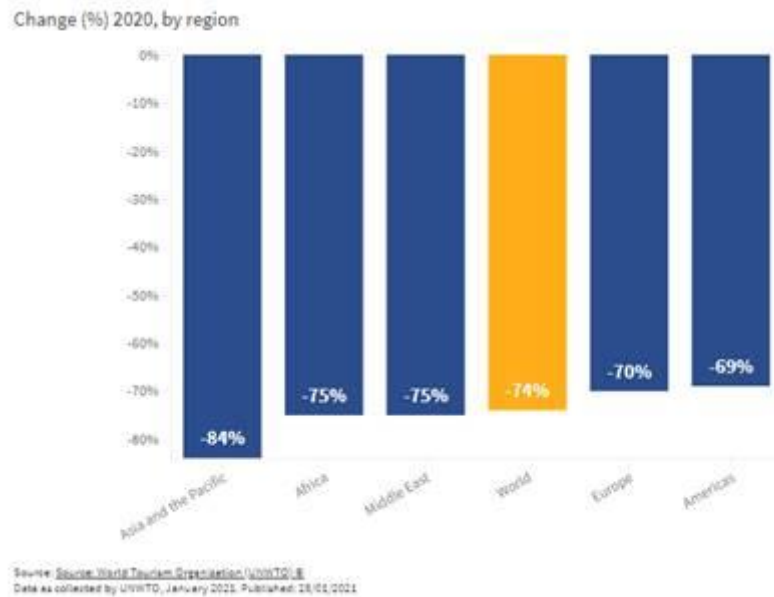
COVID-19 is an infectious disease caused by the coronavirus, which first outbreak burst in Wuhan, China, in December 2019. The World Health Organization (WHO) declared COVID-19 as an international public health emergency on 31 January 2020 and a pandemic on 11 March 2020. At present, COVID-19 affects many countries around the world with 96 million cases and more than two million deaths being reported by 20 January 2021. Unfortunately, the tourism sector is one of the sectors most affected by the COVID-19 pandemic, turning 2020 into the worst year ever recorded in the history of tourism, mainly due to travel restrictions, low travel confidence of tourists and the global struggle to contain the COVID-19 virus.

According to the information provided by *the World Tourism Organization (UNWTO)*, destinations received 1.000 million fewer international tourists in 2020, compared to the same period in 2019, when 1.459 million international tourists were received. This has resulted in a loss of USD 1.3 billion in export earnings from international tourism. According to the United Nations, 100 to 120 million direct jobs are at risk, mainly in small and medium-sized enterprises.

Under these conditions, **global tourism will have fallen back to levels 30 years ago**, losing more than 2% of global GDP by 2019.

According to data provided by the European Commission, this decline in tourism in 2020 will generate significant losses of income: 85% for the hotel sector, 85% for tour operators, 85% for long-distance trains and 90% for cruises and airlines. Besides, we must also bear in mind that in many countries there is a business network around the tourism sector that is not part of these sectors, such as tour guides, transport, culture, leisure activities, crafts, etc., which will also be severely affected.

Global international arrivals fell by 74% by 2020, with the percentage decline differing from region to region depending mainly on the level of travel restrictions, the evolution of demand and the pandemic situation.



Source: World Tourism Organization

The following table analyses data on decreases in international tourist arrivals in most countries in the Mediterranean region, from January to October 2020, compared to 2019 (data provided by the *World Tourism Organisation*).

COUNTRIES	(Increase or Decrease in % January - October 2020 with regard to 2019)										
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Total
ALBANIA	19	14	-66	-97	-96	-72	-67	-63	-36	-47	-60
ALGERIA											
BOSNIA HERZEGOVINA	24	-7	-77	-100	-100	-95	-94	-88	-88	-88	-84
BULGARIA	9	5	-44	-89	-87	-75	-66	-68	-56	-45	-61
CYPRUS	4	0	-67	-100	-100	-98	-88	-81	-83		-84
CROATIA	2	1	-81	-100	-98	-76	-51	-53	-82	-90	-67

EGYPT	10	6	-64	-100	-100	-100	-93	-82			-69
FRANCE											
GREECE	20	25	-47	-96	-98	-94	-85	-73	-74		-77
ITALY	4	-8	-83	-90	-84	-72	-55	-45	-47		-57
JORDAN	12										12
LEBANON	-27	-30	-80	-100	-98						-71
LIBYA											
MOROCCO											
MONTENEGRO	4	12	-67	-100	-100	-95	-93	-81	-81	-92	-84
SERBIA	29	14	-66	-99	-98	-87	-89	-87	-83	-75	-75
SPAIN	-1	1	-64	-100	-100	-98	-75	-76	-87	-87	-76
SYRIA	4	5	-62	-99	-99	-97	-97	-98			-74
TUNISIA	10	10	-60	-100	-99	-98	-83	-89	-85	-90	-77
TURKEY	16	4	-68	-99	-99	-96	-86	-71	-59	-59	-72

Source: prepared by the authors UNWTO data

As the table above shows, the plunge in tourism caused by the pandemic is enormous. All countries in the Mediterranean region have suffered a drastic reduction in international tourist arrivals during April and May, with a decrease of at least 89% compared to the previous year. In many of these countries, the decrease in total (100% decrease compared to arrivals in 2019) as is the case of Bosnia & Herzegovina, Cyprus, Croatia, Egypt, Spain, Lebanon, Montenegro and Tunisia.

Concerning the evolution in July and August, in the height of the summer season, the decrease in arrivals is a little less marked, but still very serious, reaching levels of 80% decrease in general terms. Specifically, the country with the smallest decrease in tourist arrivals in July was Croatia, with 51% less than in July of the previous year, while Italy was the country with the smallest decrease in August, with 45% less than the previous year.

As will be further analysed, the tourism sector contributes significantly to GDP growth in the economies of the countries of the Mediterranean region (see section 3.2 of this document), reaching and exceeding 20% in many of them. This fact explains the **serious negative consequences that the crisis derived from the pandemic may have on employment and economic growth in the different countries of the region.**

Despite the evolution of the pandemic at the global level, during 2020, there have been attempts of recovery in the sector. **Certain markets have tried to boost recovery through domestic tourism.** According to IATA, domestic traffic in China returned almost to normal levels in October, while Japan and Brazil saw solid improvements, and Russia's domestic tourism remained more resilient than most markets. In contrast, domestic air traffic remained particularly weak in the United States and Australia.

At the beginning of November 2020, 118 destinations (54% of all destinations worldwide) closed fully or partially their borders (161 destinations on 1 September). Of these 118 destinations, 59 destinations completely closed their borders for international tourism and 59 destinations have partially closed their borders. Of these 118 destinations:

- 4 destinations belong to Europe (7% of destinations in Europe).
- 13 destinations belong to Africa (25% of the destinations in Africa)
- 5 destinations belong to the Middle East (38% of destinations in the Middle East).

On the other hand, at the beginning of November 2020, 152 destinations (70% of global destinations) lessened their restrictions to facilitate international

tourism (with an increase of 37 destinations since September). Of these 152 destinations:

- 49 destinations belong to Europe (91%of destinations in Europe), with an increase of 44 destinations since 1 September.
- 40 destinations belong to Africa (75%of destinations in Africa), with an increase of 14 destinations compared to 1 September.
- 8 destinations from the Middle East (62%of destinations from the Middle East), with an increase of three destinations compared to September 2020.

**Figure 6 - Category of travel restrictions by destinations that have eased COVID-19 related travel restrictions**



Source: World Tourism Organization

**Figure 1 - Destinations that have eased COVID-19 related travel restrictions as of 1 November 2020**



Source: World Tourism Organization

Of course, the destinations which lessened their restrictions or which closed their borders totally or partially have varied in recent months, and will continue to do so, depending on the evolution of the pandemic in their countries and neighbouring countries.

Also, more and more destinations have introduced PCR testing as a security measure on arrival at airports. In fact, as of 1 November 2020, 58% of destinations worldwide require PCR testing. Moreover, destinations value the implementation of travel facilitation measures, such as a possible "COVID passport".

Given that each country applied different border control policies against the spread of the pandemic, some uncertainty and insecurity was generated, which aggravated the drop in travel even more, as it complicated the travel process and penalised the few tourists who might be willing to travel.

In response to this lack of information, several private initiatives were launched, creating interactive maps to consult travel restrictions, thus providing information to international tourists and boosting decision-making.

In this regard, the World Tourism Organisation details the health and hygiene measures implemented in each of the countries at the following link: <https://www.unwto.org/covid-19-measures-to-support-travel-tourism>.

The European Commission has also made available a tool, <https://reopen.europa.eu/en>, which provides an overview of the health situation in European countries and allows monitoring the evolution of the coronavirus situation in each country and provides information on the various restrictions in force.

Concerning the coordination of countries in terms of border control, during January 2021, the **Global Crisis Committee for Tourism** created by the UNWTO held its first meeting to make **progress in the reactivation of tourism**, through the integration of vaccines, safe travel and boosting the confidence of the tourism sector.

This Committee has highlighted the importance of advancing cooperation on vaccination certificates to ensure the implementation of common and digital travel documents, protocols and principles.

The Committee's own Technical Group together with other working groups from other bodies are working to ensure that governments implement the measures and that they are enforced at all levels.

The Committee also called for support for the OECD initiative to **create a harmonised border control system**. This system would be developed together with the World Tourism Organisation and the World Health Organisation.

On the other hand, about the measures that the different governments are implementing to alleviate the effects of the pandemic, the *World Tourism Organisation* details the **main monetary, fiscal, employment, collaboration and sector recovery initiatives** that countries are developing to accelerate recovery: <https://www.unwto.org/covid-19-measures-to-support-travel-tourism>.

Moreover, considering that **air transport is a strategically important sector in the tourism value chain**, as without flights international tourism is limited to visiting neighbouring countries by land, sea or rail, some countries have granted state aid to their airlines, such as France with Air France, Germany with Lufthansa or Italy with Alitalia.

These are some concrete examples of measures taken by some countries in the Mediterranean area, according to the report "COVID-19 and the Transformation of Tourism", published in August 2020 by the United Nations:

Egypt: it deferred all payments owed by tourist and hotel establishments and declared that all bazaars and cafes located at archaeological sites were exempt from paying rent until tourism could return safely. The Central Bank of Egypt offered tourist facilities funds at low-interest rates, in particular, to pay staff salaries, and launched a financing initiative to support tourism. In addition to reducing the interest rate, banks can grant credit facilities with



a maximum repayment period of two years, as well as a grace period of six months from the date of granting.

Bulgaria: the government-assisted businesses (hotel establishments, travel agencies and tour operators, restaurants and fast food shops, among others) by covering insurance payments owed by employers.

Italy: the suspension of payment of taxes, social security and social benefits in the tourism sector was authorised and extended measure to cultural enterprises.

Serbia: it announced direct payments to businesses (or a percentage of salaries) that were forced to close due to the pandemic.

Lebanon: it allowed economic institutions to lend money without interest for five years to help pay salaries.

Montenegro: it announced that subsidies for April and May salaries would be granted to tourism entrepreneurs and SMEs (if they apply, tourism companies will receive subsidies to pay salaries).

Greece: Workers whose contracts are temporarily suspended will receive compensation and the state will pay for their social and health insurance.

Morocco: there is flexibility about social security contributions, with full payment obligations to employers being cancelled and the state will cover 70% of lost wages for three months to assist part-time workers.

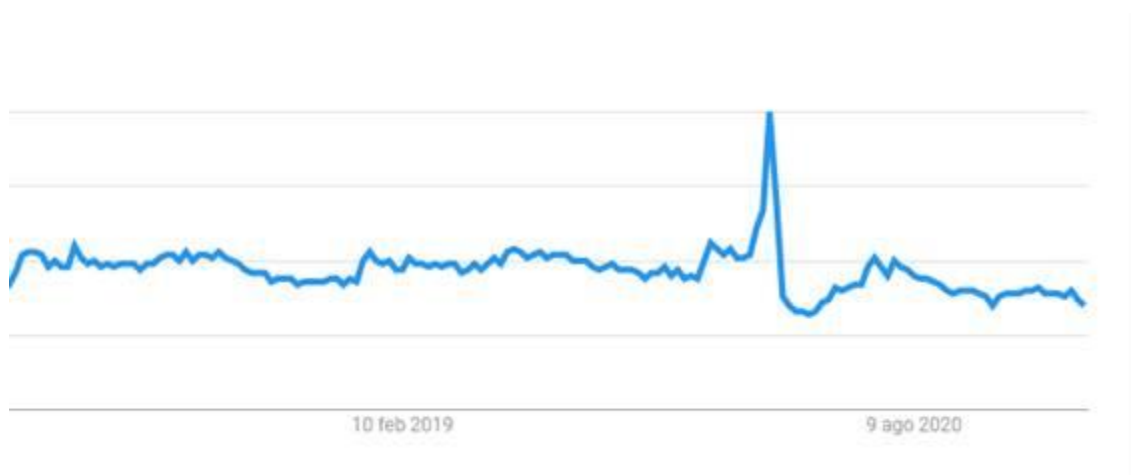
Albania: The Ministry of Tourism and Environment, in collaboration with the Ministry of Health and Social Protection, prepared a protocol of measures against COVID-19 during the 2020 season. It aims to regulate the conditions to be met by tourism enterprises to restart the tourist season and to guide them and protect staff and visitors.

Algeria: it created a specific monitoring unit for tourism, chaired by the Director-General of Tourism, which monitors the situation in consultation with operators and professionals, including employers and trade unions.

Although indeed, international tourist arrivals fell drastically in 2020, despite the efforts of the countries receiving tourism, it is also true that tourists' travel willingness to travel has been maintained.

As the graph below shows and based on data provided by Google Trends, there was a large drop in searches for the word "travel" on the internet coinciding with March 2020, when the pandemic was declared and confinements began in most countries. However, interest has been growing since then and a similar trend to that of the previous year 2019 can be observed, especially in July and August 2020.

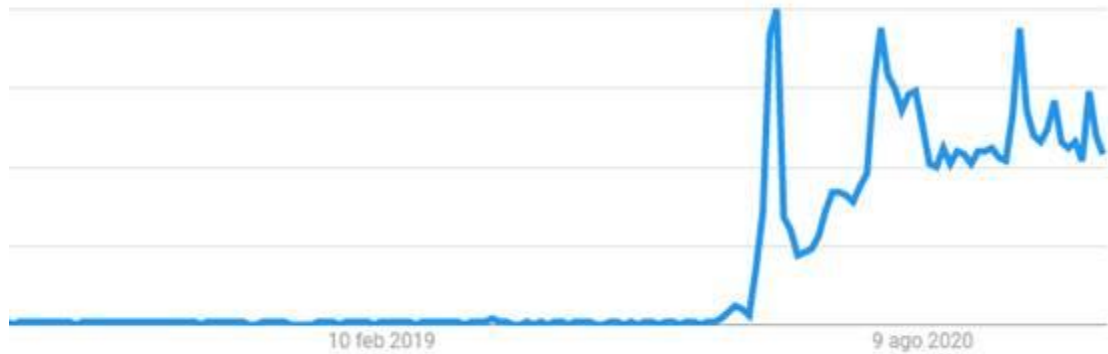
Interest over time in the search term "Travel"



Source: Google Trends

By contrast, searches for the words "Travel restrictions" have experienced a large increase during the pandemic, and were not relevant before 2020. This fact shows the concern and uncertainty that potential tourists had when it comes to gathering information to travel safely.

## Interest over time in the search term "Travel restrictions"



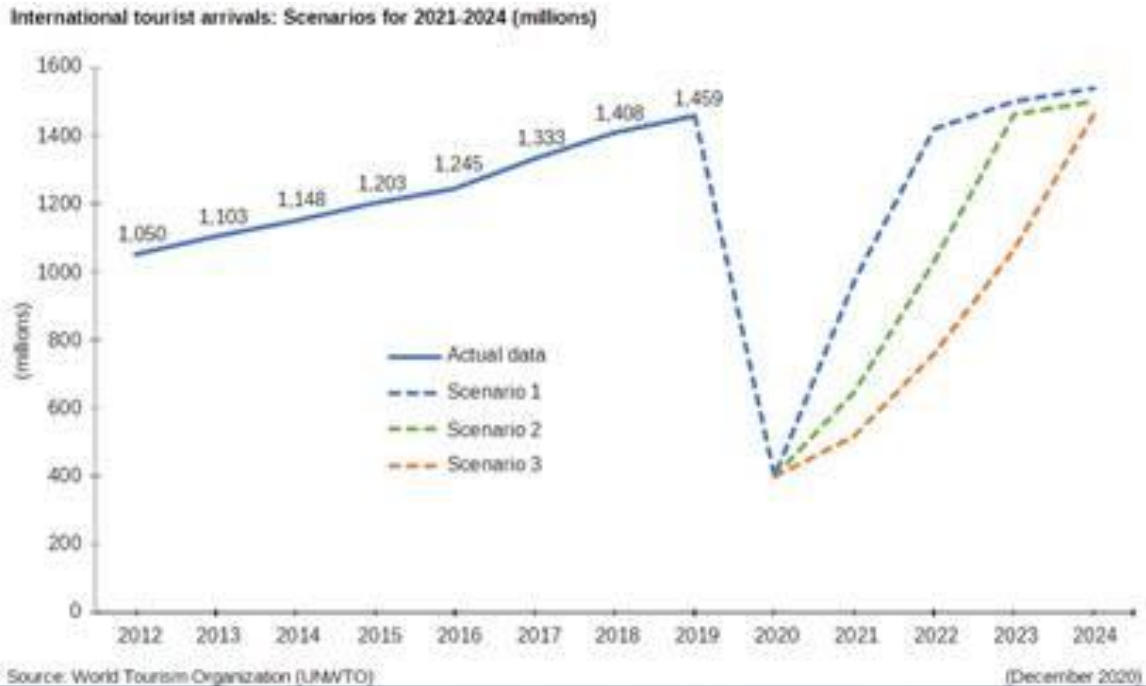
Source: Google Trends

### 2.1 Possible recovery scenarios

*The World Tourism Organization* expects that the announcement of the vaccine and the start of the vaccination campaign will gradually increase consumer confidence. According to a survey also conducted by the UNWTO for its Panel of Experts, the main barriers to the recovery of international tourism are travel restrictions (29%), virus containment (19%) and consumer confidence (15%).

In May 2020, *the World Tourism Organisation* presented three possible scenarios for the evolution of international tourist arrivals up to October 2020, showing a decline of between 45% and 95% in all three scenarios. The forecast scenario puts the decline in international tourist arrivals in October 2020 at 83%.

With the update of the study, the *World Tourism Organisation* forecasts the evolution of international tourist arrivals for the coming years, taking into account three scenarios, and always considering a gradual overcoming of the pandemic, the positive effects of the vaccine, greater tourist confidence and a decrease in restrictions.



Source: World Tourism Organization

In all three cases, a rebound in global international tourist arrivals is expected in the second half of 2021, but depending on the scenario, the 1,459 million international tourists of 2019 would be reached between the end of 2023 and the end of 2024.

UNWTO's extended scenarios for 2021-2024 indicate that it could take between two and a half to four years for international tourism to return to 2019 levels. Most experts do not foresee a return to pre-pandemic levels before 2023 in the long term:

- 1% of people surveyed believe that the number of international arrivals corresponding to 2019 will be reached in 2021
- 15% of experts think it will be reached in 2022
- 43% of respondents believe that the level of 2019 international arrivals will be recovered in 2023
- 41% believe that the levels of 2019 will not be recovered until 2024 or even later.

According to UNWTO experts, the forecast for 2021 compared to 2020 is as follows:

- 45% of experts foresee a better outlook in 2021 than in 2020
- 25% expect similar performance in 2021 as in 2020
- 30% expect a worsening performance in 2021.

Regarding the potential rebound in global tourism activity, UNWTO experts' expectations worsen compared to their October 2020 forecasts:

- 50% of respondents believe that the rebound will occur in 2022 (compared to 21% who expressed this in October 2020).
- 50% of experts believe that the rebound may take place in 2021 (compared to 79% in October 2020).

The new international tourism scenario, following the COVID-19 pandemic, could present, according to the UNWTO, a series of changes:

- Increase in domestic tourism.
- Outdoor experiences, such as nature tourism, rural tourism or road trips.
- Security measures and cancellation policies.
- Last-minute bookings.
- The young tourist segment recovers more easily than mature tourists or retired tourists.
- A resurgence of responsible tourism, sustainable tourism.

## 2.2 Main Recommendations for Economic Recovery

Besides, *the World Tourism Organisation* has published a series of recommendations aimed at helping the tourism sector to recover, which are gathered into three priorities:

- **Manage the crisis and mitigate the impact** by keeping employment, supporting the self-employed, ensuring liquidity, promoting skills development and reviewing taxes, fees and regulations related to travel and tourism.
- **Provide stimulus and accelerate recovery** by providing financial stimulus, with favourable fiscal policies, lifting travel restrictions as soon as the health emergency allows, making the visa regimes more flexible, boosting marketing and consumer confidence.
- **Preparing for tomorrow:** It calls for greater consideration of tourism's contribution to the Sustainable Development Agenda and the strengthening of resilience, learning from the lessons of the current crisis.

According to the *OECD*, the survival of companies is at risk without continued support from governments to try to minimise the loss of tourism jobs and build a co-ordinated recovery of the tourism sector. **Many countries are also developing measures to build a more resilient tourism economy after COVID-19.** However, this includes preparing plans to support sustainable tourism recovery, promote **the digital transition** and move to a **greener tourism system**, and rethink tourism for the future. Priorities include:

- Restoring traveller confidence.
- Support tourism businesses to adapt and survive.
- Promote domestic tourism and support the safe return of international tourism.
- Providing clear information to travellers and businesses, and reducing uncertainty (as much as possible).

- Respond to maintain capacity in the sector and address gaps in support.
- Strengthen cooperation within and between countries.
- Build more resilient and sustainable tourism.

According to *the UN*, the roadmap for transforming the tourism sector will have to include five priority areas:

- Manage the crisis and mitigate socio-economic impacts.
- Boosting competitiveness and building resilience.
- Advance in the innovation and digitalisation of the tourism ecosystem.
- Promote sustainability and inclusive green growth.
- Coordination and collaboration to transform tourism and achieve the SDGs.

According to *the Association of Mediterranean Chambers of Commerce and Industry (ASCAME)*, the main interlocutor of the private sector in the Mediterranean, the new development model of the Mediterranean economies is based on three pillars: Digital Economy, Green Economy and Blue Economy. Among the most important sectors are logistics and transport, tourism, textiles, agriculture and food, automobile and health.

The initiatives highlighted in the *Recovery Plan* for the recovery of the private tourism sector are:

- Create a rescue and bailout fund for companies and businesses, especially for those in the travel and tourism industry, including airlines, cruise companies, travel agencies and tour operators.
- Promote stimulus policies and provide financial incentives for tourism investment and operation.
- Support SMEs and start-ups and protect the most vulnerable groups.
- Review taxes and regulation affecting transport and tourism.

- Guarantee consumer protection and trust, as well as promote events and conferences.
- Include tourism in economic emergency mechanisms at the national, regional and global level, to restore confidence and stimulate demand.
- Create crisis management strategies.
- Prioritise tourism in national, regional or international recovery programmes and development aid.

Also, *the Recovery Plan* identifies new developments in the sector:

- 'Mediterranean Tourism Council': Emphasis needs to be placed on creating new opportunities for economic growth across the region.
- Mediterranean Brand: using the claim 'Mediterranean as a brand' for co-branding in successful international marketing, and provide scope for expansion via franchising or via other models.
- Promote the Mediterranean region as a sustainable destination: This sets an unprecedented opportunity to reshape the sector and guarantee not only its growth but its sustainability, with inclusion and responsibility as key factors.
- Plan and implement a green tourism infrastructure.
- The digital age: create new opportunities, new jobs and new skills acquisition out of digitalisation.
- It is time to diversify markets, products and services, and also invest in market analysis systems.

All the major organisations agree on several priorities needed to overcome the pandemic, such as greater digitalisation of the sector, support for small and medium-sized enterprises and employment, and a commitment in favour of national tourism. However, the main organisations identified sustainable tourism as one of the main priorities. This crisis is also an opportunity to rethink the tourism sector and its contribution to the Sustainable Development Goals (SDG's), environment, and the Paris Agreement on climate change, an opportunity to work towards more sustainable, inclusive and resilient tourism.



### 3. Situation of tourism and sustainable tourism in the Mediterranean

#### 3.1. Key data on the tourism sector in the Europe, Africa and Middle East regions

There is a growing trend in passenger arrivals and tourism receipts in the region.

When we analyse the evolution of the regions that integrate the Mediterranean axis, namely the continents of Europe, Africa and Asia (the Middle East part), we realized that these three blocks, in 2019, recorded together more than 881 million foreign visitors' arrivals. This implied revenue of more than 0.707 billion US dollars, according to sources from the World Tourism Organisation.

#### EUROPE



Source: UNWTO TOURISM DASHBOARD - WTO 2019



## AFRICA



Source: UNWTO TOURISM DASHBOARD - WTO 2019

## MIDDLE EAST



Source: UNWTO TOURISM DASHBOARD - WTO 2019

Great potential in terms of tourism supply

The countries on the northern shores of the Mediterranean, namely Italy, Spain and France (although they do not appear in the table) represent a crucial amount in terms of the total supply of establishments, rooms and beds in the whole of the European continent.

In the following graph, Italy leads in the number of establishments (32.730), number of rooms (with more than one million) and number of beds (more than two million). Spain is another country that makes a significant contribution in terms of a high number of establishments, rooms and beds, as shown. Italy and Spain alone (excluding France, which would possibly have similar or higher ratings) account for more than half of the number of beds on the European continent.

## EUROPE

**Total Capacity**

COUNTRY	ESTABLISHMENTS	ROOMS	BEDS
Italy	32.730	1.092.758	2.260.490
Germany	31.615	993.298	1.959.076
Spain	19.381	929.510	1.951.230
Austria	11.823	290.878	607.010
Portugal	6.510	190.472	438.003
Romania	7.608	154.043	329.931
Czech Republic	6.236	141.110	328.501
Switzerland	4.646	140.331	273.849
Bulgaria	3.166	127.052	288.027
Norway	1.103	84.780	109.151
Croatia	1.089	82.038	71.005
Kazakhstan	3.592	15.913	81.201
Hungary	2.324	15.013	84.090
Finland	794	60.444	33.515
Denmark	570	50.824	102.742

Source: UNWTO TOURISM DASHBOARD - WTO 2019



Among the southern Mediterranean countries located on the African continent, Tunisia (by some of rooms) and Algeria (by some establishments) stand out:

### AFRICA

#### Total Capacity

COUNTRY	ESTABLISHMENTS	ROOMS	BEDS
Tunisia	876	118.008	236.015
South Africa	3.023	88.600	
Ethiopia	1.555	47.487	59.353
Mozambique	2.188	35.381	57.995
Madagascar		29.746	
Angola	235	4.323	7.902
Mauritius	12	3.489	1.024
Cabo Verde	284	3.092	1.050
Togo	600	1.576	3.000
Niger	98	4.187	4.768
Lesotho	70	4.028	5.971
Eswatini	64	3.293	3.644
Reunion	77	2.825	3.600
Comoros	72	768	1.536
Algeria	1.417		125.675

Source: UNWTO TOURISM DASHBOARD - WTO 2019

Finally, among the Mediterranean countries located on the Asian continent (located in the Middle East), regarding the supply in terms of the number of rooms, countries such as Lebanon and Jordan stand out.



## MIDDLE EAST

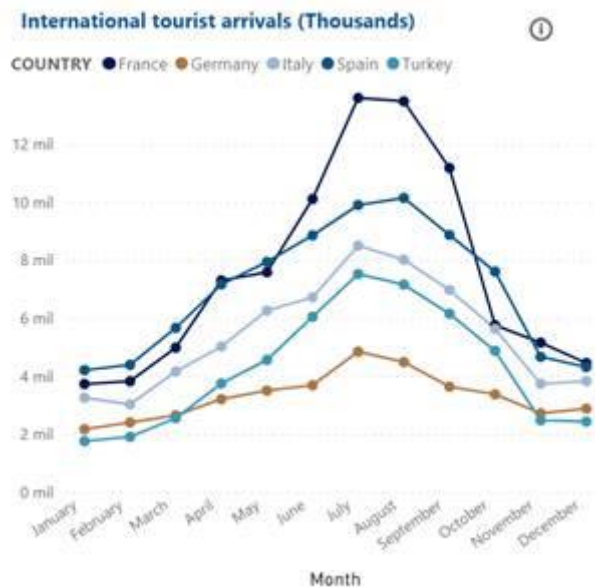
### Total Capacity

COUNTRY	ESTABLISHMENTS	ROOMS	BEDS
Saudi Arabia	8,281	606,519	1,221,243
Lebanon	584	4,286	26,659
Jordan	577	4,169	4,574
Qatar	130	7,261	
Palestine	125	6,917	14,852

Source: UNWTO TOURISM DASHBOARD - WTO 2019

From the point of view of seasonality throughout the year, the following graph shows the number of international arrivals recorded by month in 2019, among the main Mediterranean countries located in each continent:

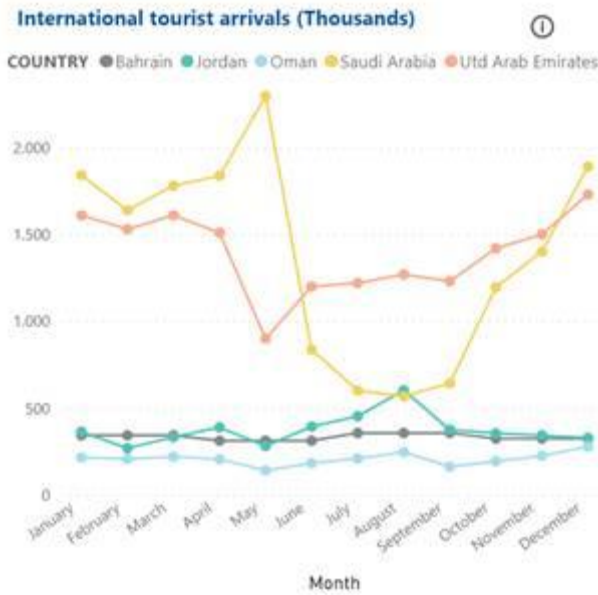
## EUROPE



Source: UNWTO TOURISM DASHBOARD - WTO 2019

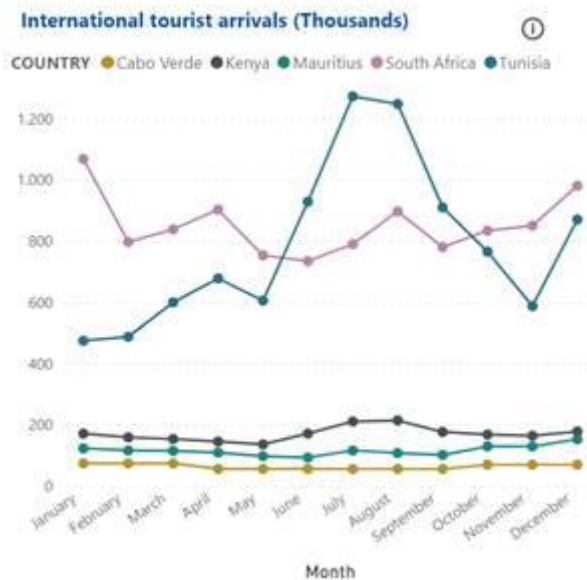


## MIDDLE EAST



Source: UNWTO TOURISM DASHBOARD - WTO 2019

## AFRICA



Source: UNWTO TOURISM DASHBOARD - WTO 2019

It is very important to highlight that seasonality is a key issue in the sustainability of tourism in the Mediterranean region. This seasonality has consequences at social, economic but also environmental levels because destinations suffer great differences in their impacts throughout the year. Some examples would be the construction of infrastructures that are only used during one season of the year, the creation of unstable jobs that vary over time, the rise of resources consumption and the production of wastes concentrated in the summer months, among others. Water supply has also become a major issue, especially among residents and the providers of tourist infrastructure and resorts, such as golf courses, swimming pools, etc. The above impacts have serious implications for the future, in terms of tourism planning and development in the Mediterranean region.

### 3.2 Overview of the tourism sector in the countries of the Mediterranean area

#### Tourism, a key sector for the economy

The importance of the tourism sector for many economies of the countries bordering the Mediterranean Sea is and has been crucial in recent years. Through this sector, many countries have developed large and important projects to improve their transport, communications, environmental and social infrastructures, which has led to the creation of a large number of jobs, both direct and indirect.

**More than 406 million international arrivals have generated 11 million jobs.**

As can be seen in the following table below, a figure of more than 406 million international tourists' arrivals\* was recorded in 2019. Most countries recorded an increase compared to the previous year. This is more clearly seen if we take into account the evolution of the last 10 years, where the average growth is positive in all countries. The jobs generated by the



tourism industries in all these countries exceed 11 million, which demonstrates the great relevance of this sector for the economy and society of the Mediterranean countries.

COUNTRIES	International tourist arrivals in 2019 (millions)	% variation 2019/2018	%Average annual growth over the last 10 years	International tourism revenues 2019 (USD million)	%Variation (in real terms) 2019/2018	Arrivals revenue 2019 (USD)	Number of employees in tourism industries (thousands) 2017/18/19	% Contribution of the Tourism Sector to GDP
Albania	5,9	15	13	2.300	12	390	47	27
Algeria	2,4	-11	2	100	-33	50	308	6,8
Bosnia-Herzegovina	1,2	14	14	1200	13	980	27	10,6
Bulgaria	9,3	0	5	4.300	1	460	-	11,8
Cyprus	4,0	1	6	3.300	-1	820	46	23
Croatia	17,4	4	6	11.800	11	680	87	25,1
Egypt	13,0	15	0	13.000	12	1.000	1.992 (2015)	11,9
France	90 (2018)	3 (2018-2017)	-	63.800	2	-	2.000	9,5
Greece	31,3	4	8	20.400	13	650	320	21,5
Italy	64,5	5	4	49.600	6	770	1.953 (2015)	13,3
Jordan	4,5	8	2	5.800	10	1.290	52	20
Lebanon	1,9	-1	0	8.600	2	4.440		20
Libya	-	-	-	-	-	-		3
Morocco	12,9	5	4	8.200	8	630	548	18,9
Montenegro	2,5	21	9	1.200	10	490	16	21,9
Serbia	1,8	8	11	1.600	9	870	32 (2018)	7
Spain	83,5	1	5	79.700	3	950	2.605	14,7

Syria	-	-	-	-	-	-		11,5
Tunisia	9,4	14	2	2.100	35	220		16
Turkey	51,2	12	5	29.800	18	580	1.569	12,8
<b>Total</b>	<b>406</b>						<b>11.602</b>	

Source: Own elaboration based on UNWTO Tourism Dashboard

\* These are the latest available data, there is no updated data for France, Syria and Libya.

### Significant contribution of tourism to each country's GDP

Finally, it is worth mentioning the great importance of this sector for many of the local economies, as there are some countries such as Albania, Cyprus, Croatia, Greece, Jordan, Lebanon or Montenegro where tourism contributes more than 20% of the country's GDP.

### 3.3 Main tourism segments and trends in Mediterranean countries

To have an overview of the most important segments and trends in the Mediterranean area, a table has been prepared with information obtained from the promotional websites that the tourism authorities of each country make available to international tourists. These websites tacitly indicate the most relevant segments for the destination and in particular those in which each country has the greatest experience and tradition. The table has been prepared by putting in each row a country and in each column the tourism segments.

In order to **graphically identify where the strongest segments are located**, colours have been assigned according to the importance detected for each one of them, as follows:

	It means that this segment is not very important for the country
	It means that the segment exists, but it is not very relevant
	It means that this is an important segment
	It means that the country is very strong in this segment



Country	Vacation	Sun & Beach	Cruises / Nautical	Sports	Winemaking	Gastronomic	Adventure	Cultural/ Heritage	Rural	Business - MICE	Health-Beauty	Snow
Albania	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Blue	Orange	Orange	Yellow	Yellow
Algeria	Orange	Orange	Orange	Yellow	Orange	Orange	Orange	Orange	Orange	Yellow	Yellow	Yellow
Bosnia-Herzegovina	Orange	Yellow	Yellow	Orange	Orange	Orange	Orange	Blue	Orange	Yellow	Yellow	Blue
Bulgaria	Orange	Orange	Yellow	Orange	Orange	Orange	Orange	Blue	Orange	Orange	Yellow	Blue
Cyprus	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Yellow	Orange	Yellow
Croatia	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Orange
Egypt	Orange	Orange	Blue	Yellow	Orange	Orange	Orange	Blue	Yellow	Orange	Orange	Yellow
France	Blue	Blue	Blue	Blue	Blue	Blue	Light Blue	Blue	Blue	Blue	Blue	Blue
Greece	Orange	Orange	Light Blue	Orange	Light Blue	Light Blue	Orange	Blue	Orange	Orange	Orange	Orange
Italy	Blue	Blue	Blue	Blue	Blue	Blue	Light Blue	Blue	Blue	Blue	Light Blue	Blue
Jordan	Orange	Yellow	Yellow	Orange	Yellow	Yellow	Blue	Blue	Orange	Orange	Yellow	Yellow
Lebanon	Orange	Orange	Orange	Orange	Yellow	Light Blue	Orange	Orange	Orange	Yellow	Yellow	Orange
Libya	Yellow	Yellow	Light Blue	Light Blue	Yellow	Light Blue	Light Blue	Light Blue	Light Blue	Yellow	Yellow	Yellow
Morocco	Blue	Blue	Light Blue	Light Blue	Light Blue	Blue	Blue	Blue	Light Blue	Light Blue	Light Blue	Light Blue
Montenegro	Orange	Orange	Orange	Orange	Yellow	Light Blue	Orange	Orange	Orange	Yellow	Yellow	Light Blue
	Orange	Yellow	Yellow	Orange	Yellow	Light Blue	Orange	Orange	Orange	Yellow	Yellow	Light Blue

Serbia	Orange	Yellow	Yellow	Orange	Yellow	Light Blue	Orange	Orange	Orange	Yellow	Yellow	Light Blue
Spain	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Light Blue	Dark Blue	Light Blue	Dark Blue	Dark Blue	Dark Blue
Syria	Yellow	Yellow	Yellow	Yellow	Yellow	Orange	Yellow	Orange	Light Blue	Yellow	Yellow	Yellow
Tunisia	Dark Blue	Dark Blue	Dark Blue	Light Blue	Light Blue	Dark Blue	Light Blue	Dark Blue	Light Blue	Light Blue	Light Blue	Yellow
Turkey	Light Blue	Light Blue	Light Blue	Light Blue	Dark Blue	Light Blue	Light Blue	Light Blue	Light Blue	Dark Blue	Dark Blue	Dark Blue

Source: Own elaboration based on national sources

Culture/heritage, gastronomy, cruises / nautical, are the most relevant segments for the Mediterranean area.

As can be seen in the table, the most important cloud of blue colours is distributed among the culture and heritage, gastronomy and cruises and nautical segments. The Mediterranean countries represent a very important source of culture and heritage wealth, with a multitude of monuments and an excellent range of museums that make the area a great attraction for international visitors wishing to make cultural trips. Also, the gastronomic segment stands out, since the rich, varied and healthy Mediterranean diet is a great resource of the area and is an exceptional reason to visit the region. On the other hand, the Mediterranean Sea that bathes the countries of the area is favourable for all kinds of cruise activities, as well as for enjoying sailing and a multitude of recreational activities related to this segment.

**The most sustainable segments, present in the Mediterranean area**

It should be noted that the Mediterranean destination includes segments that contribute to the creation of greater sustainability of a destination, such as rural tourism, which respects the environment and contributes to the development and prosperity of local communities, adventure tourism and sports tourism.

### 3.4 Main initiatives, challenges and niches in sustainable tourism

The following table describes the main initiatives, challenges and niches or opportunities in sustainable tourism in the countries of the Mediterranean area.

The table below has been elaborated by researching the different strategic plans of each Mediterranean country and identifying some of the most important objectives set shortly, as well as the challenges and aspects to be developed in terms of sustainability in each territory:

Country	Sustainable tourism initiatives	Sustainable tourism challenges	Niches / Opportunities in sustainable tourism
Albania	National Strategy for Sustainable Tourism Development 2019-2023.	<p>Development of tourism infrastructure.</p> <p>Regulation, standardization and certification of lodging establishments and other tourism services.</p> <p>Effective system of continuous professional training in tourism.</p>	<p>Promote public and private investment.</p> <p>Development of tourism products.</p> <p>Improvement of tourism services.</p> <p>Promotion.</p>
Algeria	Algeria Tourism Quality Plan (PQTA).	<p>Strengthening national competitiveness by integrating the concept of Quality.</p> <p>Professionalization in all sectors of the national tourism supply.</p> <p>Valuing national tourism territories and their local wealth.</p> <p>Algeria branded quality tourism.</p>	<p>Modernization, expansion and training.</p> <p>To create sustainability of Algeria's tourism, offer by improving the visibility of the quality of services among domestic and foreign clients.</p> <p>Renovation, Rehabilitation of tourism infrastructure.</p>
Bosnia-Herzegovina	Strategy for tourism development in the Federation of Bosnia and Herzegovina, for the period 2008-2018.	Create a framework for the development of a quality tourism offer to increase the competitiveness of tourism.	There are a number of areas and segments of tourist attraction that have not yet been explored, protected, identified, prepared, commissioned and promoted.



<p><b>Bulgaria</b></p>	<p>National Strategy for Sustainable Tourism Development in Bulgaria 2009-2013.</p> <p>Danube TourNet Promotion of cross-border network development. Common tourism product.</p>	<p>Strengthen the competitiveness of the sector through the efficient use and preservation of natural and anthropological resources in accordance with the principles of sustainable development.</p> <p>Implementation of international standards, European best practices, product innovations, high technology and human resources in the tourism industry.</p> <p>Preservation, protection and improvement of the quality of existing tourism resources.</p>	<p>Infrastructure improvements at the national, regional and municipal levels.</p> <p>Diversification of the national tourism product, promotion of the quality of tourism-related services and consumer protection.</p> <p>Energy efficiency measures in the tourism industry.</p> <p>Innovative and efficient systems: energy saving technologies, use of renewable energy.</p> <p>Minimizing energy consumption (e.g., efficient air conditioning and heating systems).</p>
<p><b>Cyprus</b></p>	<p>Cyprus Tourism Strategy 2011-2015.</p> <p>Collaborative work with the Travel Foundation and CSTI to support the communities.</p> <p>In 2014, the country became the first in the world to introduce mandatory sustainability criteria for its hotels.</p>	<p>Minimize environmental impacts, maximize socio-economic benefits for communities, while celebrating the island's rich and diverse culture.</p> <p>Promote investment initiatives.</p>	<p>Tools for developing domestic and high-end tourism and improving accessibility.</p> <p>Create and operate a 'Tourism Observatory'.</p> <p>Sustainability certification of some of its largest hotels.</p>
<p><b>Croatia</b></p>	<p>National Sustainable Tourism Development Plan 2021-2027.</p>	<p>Sustainable tourism development strategy to be developed up to 2030.</p> <p>A timetable will be developed for the implementation of strategically important projects, an indicative financial plan outlining the financial conditions for the implementation of specific objectives and projects of importance to tourism, and a framework for monitoring and evaluating the national plan.</p>	<p>Creation of strategic frameworks to focus our activities on the sustainability and development of the tourism sector.</p>
<p><b>Egypt</b></p>	<p>Egypt Tourism Reform Program (E-TRP) in 2018</p>	<p>Legislative reports.</p> <p>Marketing and promotion.</p>	<p>Tools to integrate the local community in cooperation</p>



	<p>to build a sustainable tourism sector through structural reforms to strengthen competitiveness and alignment with international standards.</p> <p>Eco Egypt campaign to promote protected areas in cooperation with the Ministry of Tourism and the Ministry of Information.</p> <p>First campaign to promote its protected areas, raise awareness of environmental issues and the importance of preserving natural resources.</p> <p>Partnerships with intergovernmental and international organizations to align work with the United Nations Sustainable Development Goals.</p> <p>UNDP and the Global Environment Facility on Green Tourism Initiatives.</p> <p>Collaboration with UNDP and the National Women's Council to implement the Gender Equality Label Programme.</p>	<p>Opening up new horizons for sustainable ecotourism in Egypt.</p> <p>Expand infrastructure and visitor services in 13 reserves throughout the country.</p> <p>Preserve Egypt's biodiversity in a manner that supports the country's environment and national economy.</p>	<p>with the private sector and civil society.</p> <p>Infrastructure and tourism development.</p> <p>Promoting women's economic empowerment.</p> <p>Green and rural tourism segment.</p> <p>Innovation and digitalization: innovative and digital solutions for the tourism sector to improve its competitiveness, including the "Smart Tourism in Egypt" platform.</p>
<p>France</p>	<p>Interministerial Tourism Council 2017 (TMS).</p>	<p>The pattern of increasing tourist flows.</p> <p>France's tourism offer must therefore be structured more efficiently as target markets become more aware of its diversity.</p> <p>Development of digital platforms.</p>	<p>Modernize and promote the government's tourism quality label (Tourism Quality).</p> <p>Training and employment in the sector.</p> <p>Support for digitalization and information.</p> <p>Reduction of territorial imbalances, "overtourism".</p>





<p>Greece</p>	<p>United Nations Sustainable Development Goals (SDG).</p> <p>National Strategic Tourism Plan.</p>	<p>Redesign the tourism product and redefine branding and communications to reflect the focus on quality, authenticity, resilience, sustainability and value for money.</p> <p>Develop a new strategic plan for sustainable tourism with a long-term horizon.</p> <p>Congestion caused by the excessive volume of tourists, especially during the high summer season.</p>	<p>Tools to create high-quality jobs, increase visitor spending, disperse demand, protect and enhance natural and cultural resources, and create positive impacts on the national economy as a whole.</p> <p>Segments of opportunity: sea, spa, sports, rural tourism, religious, meetings, conferences and events incentives (MICE) and health tourism as key growth opportunities.</p>
<p>Italy</p>	<p>National Strategic Plan for Tourism 2017-2022.</p>	<p>Cultural and natural heritage should be enhanced through sustainable management practices and innovative use of assets.</p> <p>A well-coordinated promotion (national/regional/local level) based on common objectives.</p> <p>Improvement of local products and brands through "brand positioning" to adapt to the national system.</p> <p>Respect for local communities and social responsibility.</p> <p>Increased use of local airports and other transportation hubs.</p> <p>Create economic value by attracting events.</p> <p>Support the competitiveness of the tourism offer through investment and product development.</p> <p>Improve service and product quality and identify segments/countries with greater potential.</p>	<p>Tools for innovation.</p> <p>Accessibility: includes increasing access to less visited areas and allows all types of visitors to enjoy tourism and fully appreciate the uniqueness of the destinations visited.</p> <p>Creation of new digital services for tourism, including Wi-Fi and broadband networks. In a new commitment to tourism mobility.</p>



<p><b>Jordan</b></p>	<p>National Tourism Strategy 2004-2010</p> <p>National Tourism Strategy 2010-2015</p>	<p>Promotional marketing.</p> <p>Product development.</p> <p>Strengthening human resources.</p> <p>Providing an effective institutional and regulatory framework.</p> <p>Improving and diversifying our product range and developing our human resources capabilities.</p>	<p>Digital marketing, tools for information and communication.</p> <p>Targeted work programs designed to create great visitor experiences by creating a competitive advantage for Jordan.</p> <p>Tools to reduce traditional seasonality.</p>
<p><b>Lebanon</b></p>	<p>Rural Tourism Strategy in Lebanon.</p>	<p>Improving the rural tourism sector and its economic growth in a sustainable manner.</p> <p>Improve cooperation between all stakeholders, private, public and civil society.</p> <p>Local communities (including authorities and municipalities) are taking more ownership of, protecting, and investing in their local properties.</p>	<p>Technical and financial tools.</p> <p>Tourism segments and activities to preserve the natural, cultural and historical heritage.</p> <p>Tools for developing a comprehensive rural tourism marketing strategy.</p>
<p><b>Libya</b></p>	<p>Action plan focused on institutional capacity building to pave the way for sustainable tourism development (2013).</p>	<p>Create jobs, diversify Libya's domestic sources of income and promote our image as an attractive tourist destination domestically and abroad.</p>	<p>Tools to create new tourism segments.</p>
<p><b>Morocco</b></p>	<p>Vision 2020: The importance of economic development and the preservation of tourism resources and environments.</p> <p>Strategy focused on regional tourism, quality and sustainable development.</p>	<p>Continued acceleration of the digital revolution and new promotion and distribution channels.</p> <p>Reform of tourism legislation.</p> <p>Establishing a culture of quality in tourism establishments.</p>	<p>Tools for improving investment in facilities and infrastructure.</p> <p>Tourism and hospitality training.</p> <p>Systems for measuring tourism quality.</p>



<p>Montenegro</p>	<p>Strategy for tourism development in Montenegro until 2020 (2008).</p> <p>National Strategy for Sustainable Development of Montenegro (2016).</p>	<p>Inadequate diversification of the tourism product, ultimately seasonality and a dominant presence in coastal areas, increase environmental pressures and contribute to uneven regional development.</p>	<p>The seasonal nature of tourism and the dominant presence in the coastal zone increase the environmental burdens of this region. Tools to develop tourism in areas beyond and correct this problem.</p> <p>Attract foreign investment and build a foundation for high quality tourism.</p> <p>New tourism products to increase positive impact on local communities.</p>
<p>Serbia</p>	<p>Tourism Development Strategy for the Republic of Serbia (2016 - 2025).</p>	<p>Reducing seasonality.</p> <p>Improve the quality of tourism jobs.</p> <p>Maintain and improve the prosperity and quality of life of local communities.</p> <p>Promote local culinary heritage, history and culture, handicrafts and popular art, small museums and vineyards.</p> <p>Maintain and enhance the natural and cultural heritage.</p>	<p>Promotion, education, training and improvement and development of the tourism supply chain.</p> <p>Enrich the tourism offer with products and services that will make tourism in Serbia more recognizable and attractive.</p>
<p>Spain</p>	<p>Support for the conversion of mature destinations: Tourism Excellence Plans Program.</p> <p>Complete modernization of mature tourist destinations on the Spanish coast.</p> <p>Spanish System of Tourism Quality (SCTE).</p> <p>Tourist use of the natural heritage, compatible with its protection and conservation.</p>	<p>National Tourism Agenda 2030: socio-economic, environmental and territorial.</p> <p>Improvement of the industry's competitive capacity and profitability, differences in the natural and cultural values of the destinations and the equitable distribution of tourism benefits and burdens.</p> <p>The competitiveness of tourism must be strengthened to generate added value and increase the quantity and quality of employment.</p>	<p>Innovation in the use of big data</p> <p>Digitalization of companies</p> <p>Promoting Smart Tourism Destinations</p> <p>Reduction of territorial imbalances, "overtourism".</p>



		Preserve natural resources and landscapes and attract investment for their protection.	
Syria	Department Strategy 2016-2018.	Achieve friendly and domestic capital flows and strengthen the role of the private sector towards attractive and appealing stages of tourism investment in specific areas, and then grow by increasing the rate of tourism to achieve balanced and sustainable development.  Development and promotion of domestic investment in traditional and manual industries.	Creating a favourable investment climate  Promotion  Restoring investor confidence  Reconstruction of tourism based on available resources
Tunisia	Tunisia's tourism strategy for 2016.  NEW DEVELOPMENT STRATEGY 2010 – 2016.	Improving the quality of tourism.  Product innovation.  Diversification.  Promoting tourism.	Maintenance/preservation of natural resources, especially in the coastal zone.  Digital tourism training.  Observatory for the creation of sustainable tourism.
Turkey	The eleventh current development plan for 2019-2023.	Diversification of the "sun and sea" mass tourism product through the development of high quality niche tourism experiences that meet consumer expectations.	Diversification and innovation in tourism activities.  Cultural tourism, sports tourism, MICE/business tourism and health/wellness sector. New tourism products.  Extending the season to benefit from a year-round product and disseminating the benefits of tourism at the regional level are other important objectives.

Source: Own elaboration based on national sources

Taking into account the information in the table above, we can highlight the following initiatives, challenges and niches or opportunities that are most repeated among the countries analysed:

### **Countries have put in place strategic plans for sustainable tourism**

Most countries have developed strategic plans for sustainable tourism or tourism. This shows that they are aware of the concept of sustainability and its planning. But it should also be noted that many countries have strategic plans that have expired or that do not correspond to a sector as changing as tourism.

On the other hand, most countries include sustainability in their plans but do not make any specific mention of the 2030 Agenda and the SDGs. An in-depth study of each strategic plan would be needed to determine whether they are truly in line with the UN SDGs.

### **Reducing the most congested points by redistributing tourism to less saturated areas**

As for the challenges we have encountered, many countries are planning to diversify tourism, intending to reduce the burden on the most congested areas and transferring the activity to other less exploited areas, thus contributing to economic development. Promotion and marketing plans are also being drawn up to develop new areas in which to develop new tourism resources. Improving the quality of tourism employment is also another commonly accepted challenge.

### **Opportunities in digitalization, training and new sustainable tourism products**

Considering the niches that have turned out to be most common among the countries, we can highlight the need for digitalization and innovation for tourism businesses, so that they will be more efficient and make better use

of local resources. Besides, some countries have opportunities for the creation of a tourism observatory, as they do not yet have an entity capable of concluding the evolution of local tourism. There are also opportunities for seasonal adjustment of tourism, as well as tourism load in coastal areas. Also, there are important opportunities in terms of improving tourism training for businesses, to increase the quality of tourism in sub-sectors such as agencies, restaurants, hotels, etc. On the other hand, there are also opportunities in the area of mechanisms for measuring the quality of tourism establishments.

Finally, according to the report prepared by the Global Compact and the World Tourism Organization, and based on a survey of companies in the tourism sector, the following challenges related to the achievement of the SDGs are identified:

- **Employment**, especially in ensuring that companies in the sector offer employment with decent and stable conditions to workers, especially women and people with disabilities.
- **Environment**, mainly due to the impact that tourism activities have on ecosystems, making it necessary to promote efficient management of resources and promote measures to combat climate change.
- **Responsible production and consumption**, as it relates to the supply chain of companies in the sector and as it relates to the promotion of sustainable consumption patterns among tourists.
- Generation of **alliances and spaces for dialogue** among all stakeholders, companies, governments, civil society and the education sector, to promote the exchange of knowledge and multiply impact.
- It is also important to have **transparency processes** in the sector's organizations, encouraging the preparation of sustainability reports.
- Also, it is important to **preserve the destination and promote sustainable and smart cities**, which the local population and tourists benefit from.
- Finally, the promotion of **sustainable management of supply chains**, as is a key issue to ensure the sustainability of the sector.

### **3.5 Main results of the "Sector Alliance Committee" of the tourism sector**

#### **Results of the Webinar**

On December 17, 2020, the webinar "*Towards an action plan on sustainable tourism 2020 in the POST-COVID-19 MED scenario*" was organized in the framework of the EBSOMED project, in which many experts and representatives of different international institutions participated, to discuss current solutions and trends in tourism, sustainability and COVID-19 in the countries of the Mediterranean region. The main conclusions were:

#### **Training improvement:**

- Improve training and knowledge in tourism, both at the level of companies and workers.
- Support to local communities, training and inclusion, etc.

#### **At the government level, the need for support:**

- The pandemic is brutally affecting the tourism sector and other closely related sectors.
- Specific lines of financing for sustainable tourism would be of vital importance.
- The role of governments is essential to sustain their companies and their citizens during this crisis.
- Need for tools at all levels to survive at this time and face the future.
- Promotion of local tourism during the crisis.



### Creating synergies for the Mediterranean destination:

- Creation of new tourism products and improvement of existing ones through sustainability at all levels.
- Collaboration between Mediterranean destinations.
- To take advantage of this crisis and transform it into an opportunity, creating synergies between regions, a common roadmap to relaunch the tourism sector.
- Implement quality systems in the Mediterranean destination.

### Results of the Survey

Besides, a survey was sent to the different Mediterranean stakeholders and the main results and comments obtained are shown below:

When asked whether any national initiative or policy was being implemented at the state level to mitigate the consequences of COVID-19 in the tourism sector, the majority of the responses obtained in this regard were affirmative, with 12 affirmative responses. On the other hand, 4 responses indicated that, in their case, no initiative existed.

Concerning specific initiatives that participants could highlight and are in the process of implementing, we found the following responses:

- Measures to improve safety and quality in tourism.
- Measures to maintain employment in the tourism sector, financial aid.
- Direct government subsidies for tourism companies. Tax and duty exemptions.

- Aid for the promotion of destinations, especially to promote local tourism.
- Measures for the improvement of training.

For the strategic areas in which each country is working in terms of sustainable tourism, the responses obtained were:

Renewable	Talent management	Digital transformation	Slow tourism	Policy development
7	1	9	6	8

Source: EBSOMED

Other:

- Sustainable tourism tax: funds raised to improve the environmental impacts of tourism.
- Tourism construction.

Regarding the question posed to the participants on the existence or not of local initiatives for the integration of women, young people, or for the implementation of new tourism ideas in the country, the following comments were obtained:

- "Yes, in my country there are measures to support employment, entrepreneurship and incentives for the hiring of these groups, as well as for the development of new ideas for tourism projects" - 8 responses obtained.
- "There are no concrete measures for these groups, although there are already many women entrepreneurs in the tourism sector in my country" - 1 response.

Regarding the question on the benefits of the possible creation of a tourism brand in the Mediterranean, such as, for example, the "Caribbean" or "Europe" brands:

Regional economic development	Homogenization of quality standards	Increasing the Mediterranean's share of the world tourism market	Unique cross-border package experience (culture, food, shopping, scenery)	Product differentiation and brand positioning
13	8	10	10	10

Source: EBSOMED

Other:

- "I think the MED destination is already a brand"
- "Cultural tourism exchange"

Continuing with the results of the main challenges to achieving the development of cross-border tourism in the Mediterranean region:

COVID-19 Restrictions	Institutional commitment/political will to have a Mediterranean brand	Lack of leadership/communication among stakeholders to develop a common offering	Specific long-term action plans and/or continuity	Harmonized talents and infrastructure	Need for digital transformation standards
10	9	11	6	4	6

Source: EBSOMED

Other:

- Cross-border cooperation - regional companies

Finally, the answers obtained on how to overcome the obstacles mentioned in the previous question:

- Cooperation between countries in the Mediterranean region.
- Marketing and joint promotion strategy for the Mediterranean region. Mediterranean brand.
- Standardization and homologation of anti-COVID-19 measures.
- Measures against seasonality.
- Institutional support and commitment.

## 4. Key Sustainable Tourism Initiatives and Institutions

At the international level, the main institutions dedicated to sustainable tourism, of interest to tourism companies and destinations, are:

	Organization	Description
	UNWTO World Tourism Organization ( <a href="https://www.unwto.org/es">https://www.unwto.org/es</a> )	The World Tourism Organization (WTO) is the United Nations agency responsible for promoting responsible, sustainable and universally accessible tourism.
	International Network of Sustainable Tourism Observatories of the World Tourism Organization INSTO ( <a href="http://insto.unwto.org/">http://insto.unwto.org/</a> )	The main objective of this observatory, which is within the framework of the TDC, is to support the continuous improvement of sustainability and resilience in the tourism sector by systematically monitoring data.
	United Nations Global Compact Pacto Mundial Red Española ( <a href="https://www.pactomundial.org/">https://www.pactomundial.org/</a> )	The United Nations Global Compact is a call for companies and organizations to align their strategies and operations with the ten universal principles on human rights, labour standards, environment and anti-corruption. The United Nations is mandated to promote the Sustainable Development Goals (SDGs) in the private sector.
	Sustainable Development Solutions Network SDSN ( <a href="https://www.unsdsn.org/">https://www.unsdsn.org/</a> )	The United Nations Sustainable Development Solutions Network (SDSN) was established under the mandate of UN Secretary-General Ban Ki-Moon. Its main objective is to promote sustainable development solutions and the implementation of the SDGs.
	Responsible Tourism Institute ( <a href="https://www.responsibletoourism.institute.com/">https://www.responsibletoourism.institute.com/</a> )	The Responsible Tourism Institute (RTI), founded in 1995, is an international non-profit NGO in the form of an association. RTI's mission has always been to promote the principles of the <u>World Charter for Sustainable Tourism</u> , adopted at the World Conference on Sustainable Tourism. For more than 20 years, it has been promoting responsible tourism at the international level.
	Tourism in the biosphere ( <a href="https://www.biospheretourism.com/es">https://www.biospheretourism.com/es</a> )	The Biosphere certification is awarded by the Responsible Tourism Institute (ITR), with the aim of promoting sustainable development actions and programs in tourism destinations and companies. The Biosphere Standard includes the contribution to sustainability of the 17 Sustainable Development Goals (SDGs) for tourism, through analysis of indicators of the UNWTO, the <u>Global Compact</u> , EU indicators and

		the criteria of the Global Sustainable Tourism Council. (GSTC).
	World Sustainable Tourism Council ( <a href="https://www.gstcouncil.org/">https://www.gstcouncil.org/</a> )	The GSTC is an independent and neutral organization, representing a diverse and global <u>membership</u> , including UN agencies, NGOs, national and provincial governments, major travel companies, hotels, tour operators, individuals and communities - all striving to achieve best practices in sustainable tourism.
	NECsTour: European Regions for Competitive and Sustainable Tourism ( <a href="https://necstour.eu/">https://necstour.eu/</a> )	NECSTouR is formed as a non-profit association and a group of destinations working on tourism, economic, social and environmental sustainability in the regions.
	European Commission ( <a href="https://ec.europa.eu/growth/sectors/tourism/offer/sustainable_en">https://ec.europa.eu/growth/sectors/tourism/offer/sustainable_en</a> )	The European Commission develops and implements EU policies.
	World Labour Organization ( <a href="https://www.ilo.org/global/lang-en/index.htm">https://www.ilo.org/global/lang-en/index.htm</a> )	A United Nations agency that brings together representatives of governments, employers and workers. The main function is to set international standards, develop policies and design programs to promote decent work.
	United Nations - Department of Economic and Social Affairs Sustainable Development ( <a href="https://sdgs.un.org/">https://sdgs.un.org/</a> )	UN platform for sharing knowledge and tools among all global stakeholders on the SDGs.

Source: Own elaboration based on the web information of the agencies.

At the international level, the **main initiatives for sustainable tourism** for small and medium-sized companies and tourist destinations are:

Organization	Initiatives	Description
	Initiatives on related issues, on sustainable tourism. <a href="https://www.unwto.org/sustainable-development/biodiversity">https://www.unwto.org/sustainable-development/biodiversity</a> <a href="https://www.unwto.org/sustainable-development/climate-change">https://www.unwto.org/sustainable-development/climate-change</a> <a href="https://www.unwto.org/sustainable-development/global-tourism-plastics-initiative">https://www.unwto.org/sustainable-development/global-tourism-plastics-initiative</a>	Global issues about plastic, climate change or biodiversity conservation
	HOTEL ENERGY SOLUTIONS (HES) <a href="https://www.unwto.org/es/desarrollo-sostenible/hotel-energy-solution">https://www.unwto.org/es/desarrollo-sostenible/hotel-energy-solution</a>	Project in collaboration with the United Nations and the Tourism and Energy Agencies of the European Union, to provide information, technical support

<p>World Tourism Organization</p> 		and training to tourism SMEs in the accommodation sector on energy efficiency and the use of renewable energies.
	<p>The sustainable One Planet program <a href="https://www.unwto.org/es/sustainable-development/one-planet">https://www.unwto.org/es/sustainable-development/one-planet</a></p>	<p>The objective is to improve the sustainable development impacts of the tourism sector by 2030 through the development, promotion and intensification of sustainable consumption and production practices that stimulate the efficient use of natural resources and produce less waste and the challenges of climate change and biodiversity.</p>
	<p>Reports on Sustainable Tourism for Development</p>	<p>Preparation of reports for the United Nations General Assembly providing updates on sustainable tourism policies of UNWTO Member States and United Nations Member States, as well as relevant agencies and programs of the United Nations system.</p>
	<p>International Network of Observatories on Sustainable Tourism of the World Tourism Organization INSTO (<a href="http://insto.unwto.org/">http://insto.unwto.org/</a>)</p>	<p>Established in 2004, the main objective of this observatory is to support the continuous improvement of sustainability and resilience in the tourism sector through systematic monitoring.</p>
<p>Sustainable Development Solutions Network SDSN (<a href="https://www.unsdsn.org/">https://www.unsdsn.org/</a>)</p> 	<p>Sustainable cities <a href="https://www.unsdsn.org/cities">https://www.unsdsn.org/cities</a></p>	<p>This thematic network seeks to identify practical solutions to improve urban management, and is actually working to support the implementation of the SDGs in cities.</p>
	<p>Research and studies on issues related to sustainability <a href="https://www.unsdsn.org/climate-and-energy">https://www.unsdsn.org/climate-and-energy</a> <a href="https://www.unsdsn.org/extractive-and-land-resources">https://www.unsdsn.org/extractive-and-land-resources</a></p>	<p>This thematic network seeks to identify practical solutions to improve urban management, and is actually working to support the implementation of the SDGs in cities.</p> <p>Research and studies on: Good Governance of Extractive and Terrestrial Resources, Climate and Energy, Health, Land Use and Food.</p>
	<p>SDG Financing <a href="https://www.unsdsn.org/sdgfinancing">https://www.unsdsn.org/sdgfinancing</a></p>	<p>This project aims to assess the costs and financing for a country to implement the SDGs</p>





	<p>SDG Index and Surveillance <a href="https://www.unsdsn.org/sdg-index-and-monitoring">https://www.unsdsn.org/sdg-index-and-monitoring</a></p>	<p>This study reports on the evolution of the implementation of the SDGs country by country.</p>
	<p>TWI2050 Report <a href="https://www.unsdsn.org/the-world-in-2050">https://www.unsdsn.org/the-world-in-2050</a></p>	<p>TWI2050 Report: Study on the transformation to the acquisition of the SAO</p>
<p>United Nations Global Agreement</p>  <p><b>Pacto Mundial</b> Red Española</p> <p>(<a href="https://www.pactomundial.org/">https://www.pactomundial.org/</a>)</p>	<p>SDG compass (<a href="https://sdgcompass.org/">https://sdgcompass.org/</a>)</p>	<p>A guide that provides tools and information for companies to align their strategies, as well as measure and manage their contribution to the achievement of sustainable development goals.</p>
<p>Responsible Tourism Institute</p>  <p><b>RESPONSIBLE TOURISM INSTITUTE</b></p>	<p>Tourism in the biosphere <a href="https://www.biospheretourism.com/en/help-us-change-the-world/79">https://www.biospheretourism.com/en/help-us-change-the-world/79</a></p>	<p>The Biosphere certification is granted by the Responsible Tourism Institute (ITR), with the aim of promoting sustainable development actions and programs in tourist destinations and companies. The Biosphere Standard includes the contribution to the sustainability of the 17 Sustainable Development Goals (SDGs) for tourism, through the analysis of indicators from the UNWTO, the Global Compact, the EU indicators and the criteria of the World Council. of Sustainable Tourism (GSTC).</p>
	<p>RIT Projects and Collaboration Project <a href="https://www.responsibletourismminstitute.com/en/research-and-project-development/34">https://www.responsibletourismminstitute.com/en/research-and-project-development/34</a> <a href="https://www.responsibletourismminstitute.com/en/international-cooperation/35">https://www.responsibletourismminstitute.com/en/international-cooperation/35</a></p>	<p>The projects plan to achieve the 17 United Nations Sustainable Development Goals through tourism destinations, businesses and services. Collaborative studies to promote cooperation, within the framework of sustainability, for the development of destinations, their tourism industries and citizens.</p>
	<p>Biosphere Training <a href="https://www.biospheretourism.com/en/biosphere-training-program/114">https://www.biospheretourism.com/en/biosphere-training-program/114</a></p>	<p>Courses endorsed by the experience and trajectory of the Responsible Tourism Institute.</p>

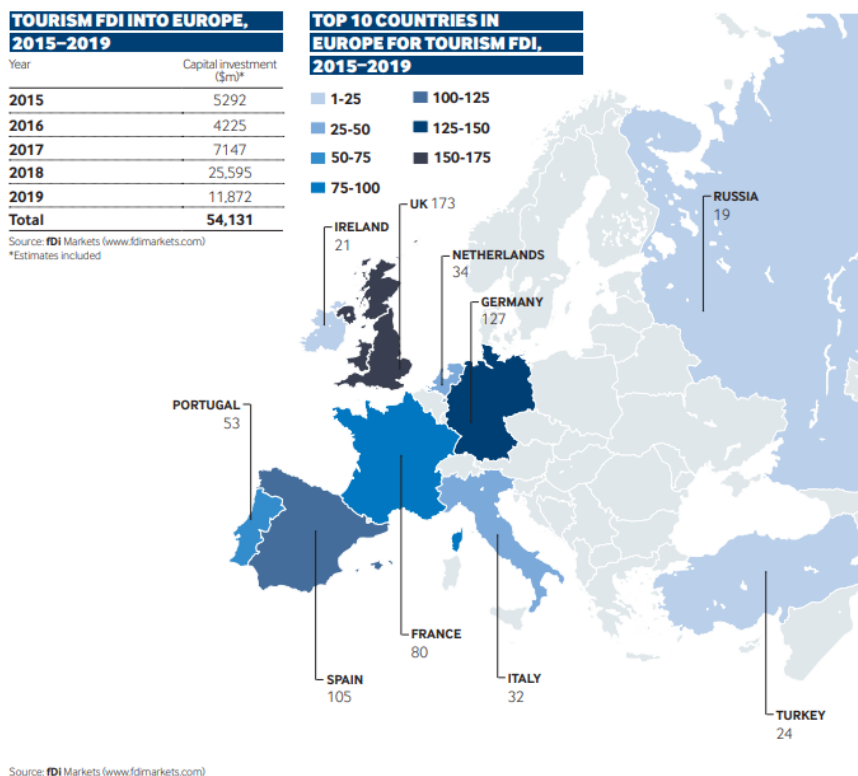
<p>Global Sustainable Tourism Council</p>  <p>Global Sustainable Tourism Council</p>	<p><a href="https://www.gstcouncil.org/">https://www.gstcouncil.org/</a></p>	<p>The World Sustainable Tourism Council manages the GSTC Criteria, world standards for sustainability in travel and tourism; and offers international accreditation for Sustainable Tourism Certification Bodies, which certify that hotels / accommodations, tour operators and destinations have sustainable policies and practices.</p>
<p>European Commission</p> 	<p>EDEN - European destinations of excellence <a href="https://ec.europa.eu/growth/sectors/tourism/eden_en">https://ec.europa.eu/growth/sectors/tourism/eden_en</a></p>	<p>EDEN, European Destinations of Excellence, aims to promote models for the development of sustainable tourism in the EU. The initiative is based on national competitions and promotional campaigns that result in the selection and promotion of a tourist "destination of excellence" for each participating country.</p>
	<p>COSME program for sustainable transnational tourism products <a href="https://ec.europa.eu/growth/sectors/tourism/offer/sustainable/transnational-products_en">https://ec.europa.eu/growth/sectors/tourism/offer/sustainable/transnational-products_en</a></p>	<p>The objective of this initiative is to strengthen transnational cooperation in sustainable tourism in the European Union, promote sustainable tourism for small and micro-enterprises and local authorities, and boost the competitiveness of the European tourism sector.</p>
	<p>European System of Tourism Indicators for the sustainable management of destinations <a href="https://ec.europa.eu/growth/sectors/tourism/offer/sustainable/indicators_en">https://ec.europa.eu/growth/sectors/tourism/offer/sustainable/indicators_en</a></p>	<p>To help destinations in managing sustainable tourism, the European Union has implemented the European System of Tourism Indicators (ETIS).</p>

Source: Own elaboration from official organisms' webpage data



# 5. Focus on foreign direct investment in the tourism sector in the Mediterranean

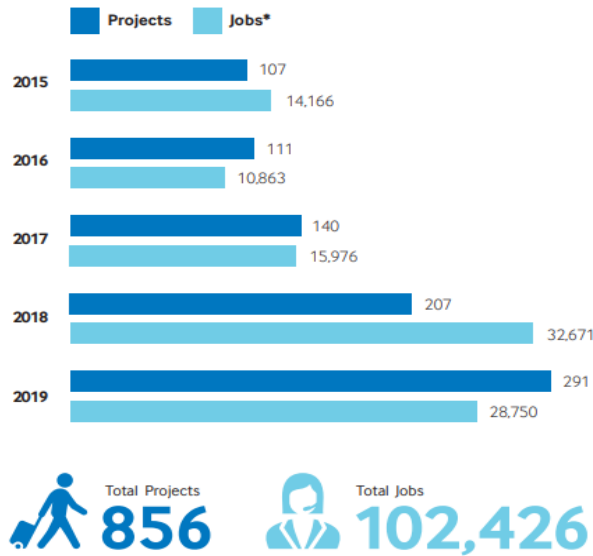
As shown below, the Mediterranean countries belonging to the European continent that receive the most foreign direct investment in the tourism sector are the following: Spain, France, Italy and Turkey.



Source: UNWTO



**TOURISM FDI INTO EUROPE, 2015–2019**



**TOURISM FDI INTO EUROPE, FIRST HALF OF 2020**

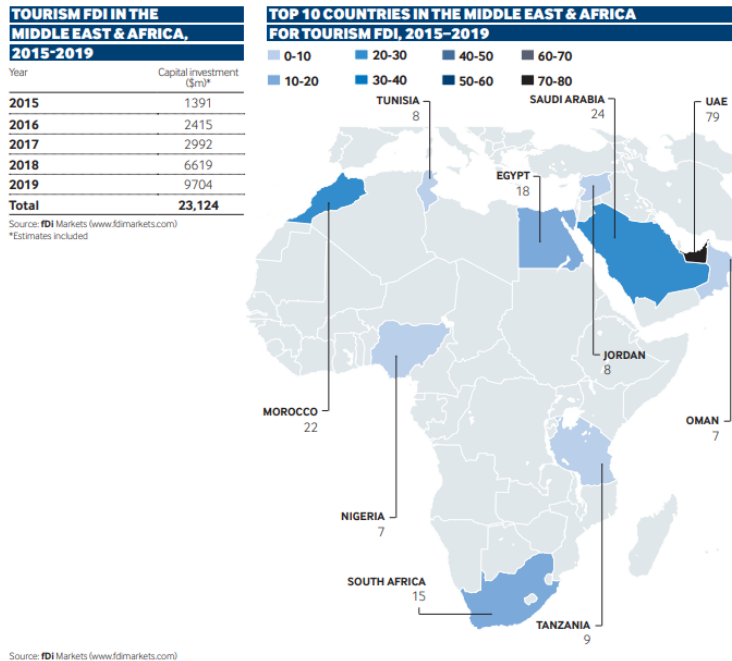
Year	Projects with tourism cluster	Capital investment with the tourism cluster*	Jobs with tourism cluster*
First half of 2020	77	3036	6247

Source: FDI (www.fdimarkets.com) \*Includes estimates

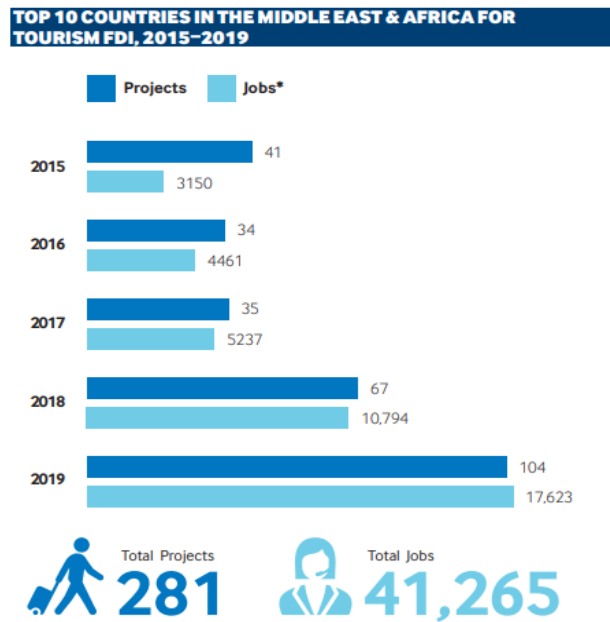
Source: UNWTO

This foreign direct investment grew significantly from 2015 to 2019, as shown in the graph above.

As for the Mediterranean countries located on the African continent and in Asia (Middle East), those that present the greatest attraction of foreign direct investment in the tourism sector are Morocco, Tunisia, Egypt and Jordan, as shown in the graph following:



Source: UNWTO



**TOURISM FDI IN THE MIDDLE EAST & AFRICA, FIRST HALF OF 2020**

Year	Projects with tourism cluster	Capital investment with the tourism cluster*	Jobs with tourism cluster*
First half of 2020	8	623	942

Source: FDI (www.fdimarkets.com) \*Includes estimates

Source: UNWTO

Investment trends in the region have fallen slightly from 2015 to 2017, but have grown strongly in 2018 and 2019, as shown in the previous graph.

The development of infrastructure for the tourism sector is one of the major recipients of investments across the globe

In general, most of the projects and investments generated decrease considerably in the infrastructure construction sector (57% of total investments). These investments are usually made by large multinationals, which have incorporated, more easily in their projects, sustainability as a relevant factor. It is also important to note that there are other sectors such as technology, internet and new technologies, travel management and reservations, websites, etc. which represent around 32% of the investments made.

There are also investment opportunities in green innovation

Regarding investment opportunities for green innovation in tourism, according to the OECD, the following investment opportunities can be concluded:

- Transition to energy efficiency: In the accommodation sector, there are many opportunities to invest in green efficiency, for example, by improving the systems of refrigeration, television and video, air conditioning, heating and laundry.
- Water management: financing for green companies that implement internal programs to improve the efficiency of water use by the customer.
- Waste management: Improving waste management can increase the sustainability of tourism on many fronts, promoting the more efficient use of resources, greater attractiveness of destinations, and job creation.
- Biodiversity: the preservation of ecosystems is at the heart of sustainable tourism. There are opportunities for green companies and innovators to protect natural resources and systematically address the issue of sustainable tourism.

- Cultural heritage: investments that maintain cultural heritage while offering opportunities to preserve, revitalize or strengthen traditions, enhance tourism, and help spread the beneficial effects of tourism to local populations.

Finally, and about private investment, it should be noted that a better interconnection of tourism investment projects with the financing instruments that currently exist is necessary.

## 6. Latest trends and profiles of the responsible tourist

Responsible tourism implies a traveller aware of the impact of their actions, who wants to enjoy his trip without leaving a negative footprint. It also requires that the public administrations and companies of the destinations develop practices that minimize the negative impacts of tourism and maximize the positive ones.

### **UNWTO tips to be a responsible traveller:**

The *World Committee on Tourism Ethics* created by the *World Tourism Organization* (UNWTO), prepared in 2005 a brochure on "The responsible tourist and traveller", which has been revised and updated in the years 2017 and 2020 (this last revision as a result of the health crisis). These reviews include tips for the responsible traveller, as well as tips to ensure a safe trip.

The tips offered to make tourism a more sustainable activity address the following aspects:

- Value hosts and common heritage.
- Protect the planet.
- Support the local economy.
- Travel safely.
- Adequately informed traveller.
- Use digital platforms rationally.

### Increased demand for sustainable tourism:

Regarding the demand for sustainable tourism, there are more and more travellers whose interest when traveling is focused on carrying out different activities and following the sustainability of the chosen destination.

For example, according to the latest data on tourists arriving in Spain (provided by the Spanish agency *Turespaña*), travellers from the following countries show a profile with the following characteristics:

- German travellers: A growing trend towards the search for “green” destinations, with beautiful landscapes and untouched nature. The environmental sustainability of the offer is becoming increasingly important among German tourists when it comes to assessing and choosing a place to spend their holidays.
- Austrian travellers: Active tourism, hiking, cycling, golf tourism or nautical tourism, are gradually gaining share.
- Danish travellers: Increasing interest in sports and activities in contact with nature (golf, cycling and hiking).
- Norwegian travellers: Environmental sustainability is an increasingly important factor when deciding your trips.
- Swedish travellers: The most relevant trend in this market is the growing concern for the environment and sustainability, the impact of which is reflected in the supply and marketing strategy of the main market operators.

On the other hand, according to sources from Booking.com, one of the most relevant Online Travel Agencies, it is expected that new trends in travellers and travel will be driven by technology, the growing sense of responsibility and a greater connection with the people and places we visit.



- Increase in travellers choosing "secondary destinations": Tourism to lesser-known destinations to try to reduce excess tourism and protect the environment will become very important in the coming years.
- Expect (technologically) the unexpected: The decision-making of travellers will be more determined by technology and its tools.
- Avoid precipitation and enjoy "slow tourism": Some travellers prefer means of transport that help to slow down speeds, to carry out more relaxed tourism, for example, the bicycle, the tram, the boat, on foot, etc.

Finally, according to sources from Hosteltur and Amadeus, it can be said that **in the coming years we will travel with "smaller footprints and bigger hearts"**. Travellers were already grappling with the environmental and social impact of tourism before the coronavirus, but the forced pause from its expansion has only given people more time and space to perceive how travel impacts the planet and local communities.

## 7. Recommendations and conclusions

After the analysis derived from this study, the following recommendations are made for the Mediterranean destination, countries and/or tourist destinations and companies.

### Recommendations at Mediterranean level

- Creation of a *Centre for Sustainable Tourism in the Mediterranean*, which brings together actions aimed at turning the Mediterranean region into a sustainable tourist destination. Some of the functions of this Centre could be:

- Actions aimed at **achieving and evaluating compliance with the SDGs** by Mediterranean countries
- **Evaluation and control of the negative impacts** of tourism, in the economic, environmental and social aspects, derived from the possible excess of tourism in certain countries or regions, or at certain times of the year, so that an integral sustainable growth is generated, both for the industry and the environment.
- **Training and advisory** actions for countries, tourist destinations and companies on sustainability and the SDGs.
- Development of joint **promotional actions**.
- Development and exchange of **good practices** in the field of SDGs, etc.

- Creation of a *Mediterranean Brand* that encourages collaboration, joint promotion and standardization of the quality and sustainability of the countries of the Mediterranean region.

- Promotion of **air connectivity** between Mediterranean destinations that facilitates the creation of joint tourism products and the exchange of tourists between destinations. In this sense, study the suitability of signing "Open Skies" agreements, which facilitate the increase in flights, more connections and more competitive prices.

- Centralize and communicate the travel restrictions of the Mediterranean countries, to facilitate and encourage international travel to the region.
- Focus on the attraction of quality tourism, which implies long stays and a higher daily expenditure per tourist, and the attraction of the responsible tourist.
- Request the *Sustainable Development Solutions Network SDSN* to carry out a study on the Mediterranean countries / on the fulfilment and evolution of the SDGs.
- Study of the financing needs for the implementation of the SDGs and financing tools, offered by *Sustainable Development Solutions Network SDSN*.
- Request for international and cooperation projects that help to promote the implementation of the SDGs in Mediterranean countries, such as the European Union, the World Bank, etc.
- Organization of projects such as the European Destinations of Excellence EDEN project, which highlights the main sustainable destinations in the Mediterranean

### Recommendations on tourist destinations (country or region)

- Implementation of real and current sustainable strategic tourism plans, which imply compliance with the Sustainable Development Goals, their goals, and the indicators to be able to analyse and evaluate the implementation.
- Promote the creation of new sustainable tourism products that involve traditional sectors, that integrate and employ people from local communities and in turn serve to decongest saturated tourist centres and take them to other areas.
- Implementation of sustainability certification systems to promote sustainable development actions and programs in tourist destinations and companies.
- Study of the financing needs for the implementation of the SDGs and financing tools, a program aimed at countries, and offered by the *Sustainable Development Solutions Network SDSN*.

- Develop **ways of collaboration between the countries and regions of the Mediterranean** that improve the implementation of the SDGs at the regional level.
- Application to **programs** developed by international organizations such as the *UNWTO World Tourism Organization* aimed at improving biodiversity, climate change, plastics or energy improvement, One Planet Sustainable Program, as well as the *Sustainable Development Solutions Network SDSN* programs or the *Responsible Tourism Institute*.
- Launch of **programs that promote compliance with the SDGs and the 2030 Agenda** by destinations, companies and tourism agents.
- Application for the **Sustainable Cities** program of the *Sustainable Development Solutions Network SDSN* that seeks to identify practical solutions to improve urban management.
- Request for international projects that help **promote the implementation of the SDGs in Mediterranean markets**, such as the European Union, or the World Bank, etc.
- **Collaboration with networks** such as *NECsTour*, which brings together destinations that work on sustainable tourism.
- **Support in tools** such as the *SDG Compass*, developed by the United Nations Global Compact, GRI and WBCSD that helps companies identify the priority Sustainable Development Goals according to their business core, which seeks to facilitate their transition to the ODS.
- Support in the **database of good practices** in the SDGs published by the United Nations Department of Sustainable Development.
- Promote **digitization, training and the creation of new sustainable tourism products** for tourism companies.

### **Recommendations at the business level**

- Implementation of **business plans that imply compliance with the Sustainable Development Goals**, their goals, and indicators to be able to analyse and evaluate the implementation.

- Support in tools such as the *SDG Compass*, developed by the United Nations Global Compact, GRI and WBCSD that helps companies identify the priority Sustainable Development Goals according to their business core, which seeks to facilitate their transition to the ODS.
- Implementation of **sustainability certification systems** to promote sustainable development actions and programs in tourist destinations and companies.
- Application to **programs developed by international organizations** such as the UNWTO aimed at improving biodiversity, climate change, plastics or energy improvement, *One Planet Sustainable Program*, as well as the *Sustainable Development Solutions Network SDSN* or *Responsible Tourism Institute*.
- Investment in digitization tools to improve company management.

## **Conclusion**

Tourism, energizer and locomotive of other activities and sectors, is a relevant sector in the economies of the Mediterranean countries, especially in the countries of the South, which provides great opportunities for progress to destinations but also carries a series of risks derived mainly from overcrowding, geographic concentration, seasonality and non-management of sustainability.

Despite the important consequences that the **pandemic caused by COVID-19 is generating in the tourism sector**, in destinations and companies, **there is still great interest from tourists to travel**, and it is expected that, with the gradual overcoming from the pandemic, the positive effects of the vaccine, greater tourist confidence and the decrease in restrictions, international tourism is reactivated. While this is true, it is also true that, according to experts from the World Tourism Organization, **1.459 million international tourists would be reached in 2019, between the end of 2023 and the end of 2024**.

As seen throughout the study, the uninterrupted growth of the importance of the tourism sector in the Mediterranean economies, the importance that

the sector represents in most of the Mediterranean economies, as well as the need to overcome crises, such as that derived from the COVID-19 pandemic, reinforce the **obligation of destinations to implement sustainable management systems**. The main international organizations identify Sustainable Tourism as the main way to overcome the crisis caused by COVID-19 and as a possibility for the long-term viability of the sector.

In this sense, the different bodies of the Mediterranean countries that manage Tourism are beginning to **include Sustainability within the strategic plans of tourism development**. But it is necessary to ensure, expressly, that, in the development plans of the countries, destinations, companies and different agents related to the sector, **the Sustainable Development Goals are defined and indicators and goals related to them are established**, with them to ensure compliance with and monitoring of the Sustainable Development Goals of the 2030 Agenda.

**Countries and destinations should focus their efforts on minimizing the negative effects of tourism**, economic, environmental and social activity and avoiding geographic concentration, seasonality and the non-management of sustainability.

The Mediterranean countries identify as **the main challenges the diversification of tourism**, which contributes to reducing the burden in the most congested areas, **the development of new tourism resources**, as well as improving the **quality of tourism employment**. Besides, they identify new opportunities in digitization, training and new sustainable tourism products.

Destinations should work to **promote those most relevant segments in the Mediterranean**, which promote the creation of joint products, such as culture/heritage, gastronomy, cruises/nautical, and also, work **especially on the segments that contribute to the creation of greater sustainability of a destination**, such as **rural tourism**, which respects the environment and contributes to the development and prosperity of local communities, adventure tourism and sports.

As has been observed, regardless of the interest of the different countries to include sustainability in the strategic plans of the tourism sector, applied to

reality we can verify that compliance with the SDGs by the different countries that make up the Mediterranean region is still very uneven. This fact could become a challenge for the Mediterranean Destination that requires, to give a joint image of sustainability and quality, to level the standards of compliance with the SDGs of the different countries. To do this, they should take advantage of the initiatives that countries, tourist destinations, and companies have at their disposal to promote sustainable planning and management.

On the other hand, if you bet on a **joint Mediterranean destination**, the involvement of tourist destinations in the management of sustainable tourism should not be carried out individually and uncoordinated, but it is **necessary to work together on sustainability. in the region.**

Finally, it is necessary to highlight the **increase in demand from responsible tourists**, who seek destinations that involve sustainable management, it can be an **opportunity for those destinations that bet on sustainability.** Tourist destinations that are not sustainable are going to lose an important segment of demand, which is growing and is more involved with sustainable averages.

To make Mediterranean tourist destinations more sustainable, the least impact of tourist activity should be prioritized, **valuing quality more than quantity**, focusing efforts on attracting tourism with a longer average stay in the destination, with higher average spending and encourage the attraction of responsible tourists, more aware of sustainability.

The creation of a Centre for Sustainable Tourism in the Mediterranean that, among others, would have the objectives of launching actions to make the Mediterranean region a sustainable tourist destination, promote air connectivity in the Mediterranean, generate a Mediterranean Brand and work for the attraction of responsible tourism would be an important line to work on.

All these issues analysed to approach Mediterranean tourist destinations to contribute to a **sustainable, comprehensive and coordinated management is not an option but an obligation**, to make the Mediterranean a Sustainable and competitive Destination.

## 8. Bibliography

- UNWTO Web Tourism Organization (<https://www.unwto.org/>)
  - o <https://www.unwto.org/green-investments-for-sustainable-tourism>
  - o <https://www.unwto.org/investment/tourism-investment-report-2020>
  - o <https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2020-09/FDI-Tourism-Report-2020.pdf>
  - o World Tourism Barometer. Volume 18- number 7- December 2020 - World Tourism Organization UNWTO
  - o Covid-19 and Tourism. 2020: A current year - World Tourism Organization UNWTO
  - o Covid-19 Related Travel Restrictions a Global Review for Tourism - Eighth Report as of December 2, 2020 - World Tourism Organization UNWTO
  - o UNWTO Tourism Panel <https://www.unwto.org/unwto-tourism-dashboard>
  - o World Tourism Organization (1995), Sustainable Tourism Charter, UNWTO Declarations, Volume 5, Number 4, UNWTO, Madrid, DOI: <https://doi.org/10.18111/unwto.declarations.1995.05.04>.
  - o <https://www.unwto.org/world-committee-tourism-ethics>
- "The tourism sector and the Sustainable Development Goals" - World Tourism Organization and Global Compact Spanish Network.
- Azcárate T., Benayas J., Nerilli G. and Justel A., 2019. "GUIA PARA UN TURISMO SOSTENIBLE. Retos del sector turístico ante la Agenda 2030", REDS, Madrid.
- Sachs, J., Schmidt-Traub, G., Kroll, C., Lafortune, G., Fuller, G., Woelm, F. 2020. Los Objetivos de Desarrollo Sostenible y COVID-19. Informe sobre Desarrollo Sostenible 2020. Cambridge: Cambridge University Press.
- GUIDE FOR SUSTAINABLE TOURISM. Challenges of the tourism sector in the face of the 2030 Agenda.
- Policy brief: COVID-19 and tourism transformation - United Nations International Network of Sustainable Tourism Observatories of the World Tourism Organization INSTO (<http://insto.unwto.org/>)
- United Nations Global Agreement (<https://www.pactomundial.org/>)
- SDSN Sustainable Development Solutions Network (<https://www.unsdsn.org/>)
- Responsible Tourism Institute (<https://www.responsibletourism.institute.com/>)
- Biosphere Tourism (<https://www.biospheretourism.com/es>)
- World Council for Sustainable Tourism (<https://www.gstcouncil.org/>)
- NECsTour: European Regions for Competitive and Sustainable Tourism (<https://necstour.eu/>)



- European Commission  
([https://ec.europa.eu/growth/sectors/tourism/offer/sustainable\\_en](https://ec.europa.eu/growth/sectors/tourism/offer/sustainable_en))
- World Labour Organization (<https://www.ilo.org/global/lang-en/index.htm>)
- SDG compass (<https://sdgcompass.org/>)
- United Nations - Department of Economic and Social Affairs Sustainable Development (<https://sdgs.un.org/>)
- EBSOMED Project (<http://ebsomed.eu/>)
- <https://ec.europa.eu/eurostat/web/tourism/data/database> EUROSTAT
- EDEN (European Destinations of Excellence)  
[https://ec.europa.eu/growth/sectors/tourism/eden\\_en](https://ec.europa.eu/growth/sectors/tourism/eden_en)
- VISIT ALBANIA <http://albania.al/>
- TOURISM ALGERIA <http://www.algeria-tourism.org/>
- Discover BOSNIA <https://www.discoverbosnia.com/things-to-do>
- Discover BULGARIA <https://bulgariatravel.org/en/>
- Discover CHIPRE <https://www.visitcyprus.com/index.php/en/>
- CROATIA TOURISM <https://croatia.hr/en-GB>
- EGYPTIAN TOURISM AUTHORITY <http://egypt.travel/>
- VISIT SPAIN <https://www.spain.info/>
- EXPLORE FRANCIA <https://www.france.fr/en>
- VISIT GRECIA <http://www.visitgreece.gr/>
- VISIT JORDANIA <http://www.visitjordan.com/>
- VISIT LÍBANO <https://www.visit-lebanon.org/leisure/>
- VISIT MOROCCO <https://www.visitmorocco.com/en>
- VISIT MONTENEGRO <https://www.visit-montenegro.com/>
- VISIT SERBIA <http://www.serbia.com/visit-serbia/>
- VISIT SIRIA <http://www.syriatourism.org/en/>
- Discover TUNISIA <https://www.discovertunisia.com/en/>
- <https://www.goturkey.com/> GO TURKEY
- [https://www.oecd-ilibrary.org/urban-rural-and-regional-development/oecd-tourism-trends-and-policies-2020\\_6b47b985-en](https://www.oecd-ilibrary.org/urban-rural-and-regional-development/oecd-tourism-trends-and-policies-2020_6b47b985-en) OCDE I-LIBRARY
- ALBANIA NATIONAL TOURISM STRATEGY <https://turizmi.gov.al/wp-content/uploads/2019/12/National-Tourism-Strategy-2019-2023-EN.pdf>
- MINISTERE TURISMO DE LA ARTESANAT DE TRABAJO FAMILIAR ALGERIE  
<https://www.mtatf.gov.dz/>  
<https://www.mtatf.gov.dz/wp-content/uploads/2020/09/GUIDE-FR.pdf>
- MINISTRY OF TOURISM BOSNIA-HERZEGOVINA  
<https://www.fmoit.gov.ba/bs/turizam/turizam-u-fbih>
- GOVERNMENT OF TOURISM BULGARIA  
<https://www.tourism.government.bg/en/kategorii/mezhdunarodna-turisticheska-politika/european-union-strategy-danube-region>
- [HTTP://WWW.DANUBETOURNET.EU/INDEX.PHP](http://www.DANUBETOURNET.EU/INDEX.PHP)
- MINISTRY OF TOURISM SPAIN [www.turismo.gob.es](http://www.turismo.gob.es) <https://turismo.gob.es/es-es/estrategia-turismo-sostenible/Documents/directrices-estrategia-turismo-sostenible.pdf>
- VICE MINISTRY DE TOURISM CYPRUS  
<http://www.tourism.gov.cy/tourism/tourism.nsf/All/A5629D6E93C25C23C225849E00411A54?OpenDocument>



- [http://www.tourism.gov.cy/tourism/tourism.nsf/all/F3B1149E603F7854C225849E0041A969/\\$file/Executive\\_Summary\\_Tourism\\_Strategy\\_2011\\_2015.pdf?openElement](http://www.tourism.gov.cy/tourism/tourism.nsf/all/F3B1149E603F7854C225849E0041A969/$file/Executive_Summary_Tourism_Strategy_2011_2015.pdf?openElement)
- CROATIA  
<https://mint.gov.hr/>  
<https://mint.gov.hr/news-11455/sustainable-tourism-development-strategy-until-2030-to-be-drawn-up/22090>  
<https://mint.gov.hr/istaknute-teme-turizam/strategija-razvoja-odrzivog-turizma-do-2030-godine/11411>
  - EGYPT  
<https://dailynewseggypt.com/2020/09/26/egypt-launches-first-sustainable-tourism-campaign-at-protected-areas/>  
<https://www.oecd-ilibrary.org/sites/74345b15-en/index.html?itemId=/content/component/74345b15-en>
  - SPAIN  
<https://www.oecd-ilibrary.org/sites/8ed5145b-en/index.html?itemId=/content/component/8ed5145b-en>
  - ITALY  
<https://www.oecd-ilibrary.org/sites/3d4192c2-en/index.html?itemId=/content/component/3d4192c2-en>
  - MOROCCO  
<https://www.oecd-ilibrary.org/sites/409d3fd2-en/index.html?itemId=/content/component/409d3fd2-en>
  - JORDAN MINISTRY OF TOURISM  
[https://www.mota.gov.jo/contents/Projects\\_\\_Initiatives.aspx](https://www.mota.gov.jo/contents/Projects__Initiatives.aspx)  
[https://www.mota.gov.jo/Documents/NTS\\_EN.pdf](https://www.mota.gov.jo/Documents/NTS_EN.pdf)  
[https://www.mota.gov.jo/Documents/NTS\\_2011-2015\\_English.pdf](https://www.mota.gov.jo/Documents/NTS_2011-2015_English.pdf)
  - LEBANON  
<http://mot.gov.lb/contact>  
[http://mot.gov.lb/Content/uploads/Publication/150225013030192~Rural%20Tourism%20Strategy\\_English.pdf](http://mot.gov.lb/Content/uploads/Publication/150225013030192~Rural%20Tourism%20Strategy_English.pdf)
  - LIBYA  
<https://www.unwto.org/archive/middle-east/press-release/2013-06-13/libya-counts-tourism-help-rebuild-country>
  - MONTENEGRO <https://mrt.gov.me/en/library/strategije>

- [HTTP://WWW.SYRIATOURISM.ORG/EN/PAGE12724/THE-MINISTRYS-STRATEGY FROM SYRIA](http://www.syriatourism.org/en/page12724/the-ministrys-strategy-from-syria)
- <https://www.oecd.org/cfe/leed/46761318.pdf> TUNISIA

-TOURSPAIN:

<https://www.tourspain.es/en-us>

- Booking.com: <http://TravelPredictions2020.com>

- Hosteltur:

[https://www.hosteltur.com/122702\\_perfil-ecoturista.html](https://www.hosteltur.com/122702_perfil-ecoturista.html)

[https://www.hosteltur.com/141582\\_seis-tendencias-que-marcaran-el-regreso-de-los-viajes-en-2021-segun-amadeus.html](https://www.hosteltur.com/141582_seis-tendencias-que-marcaran-el-regreso-de-los-viajes-en-2021-segun-amadeus.html)

# Sector Strategic Paper

Industry outlook: Sustainable Tourism in the  
Mediterranean in the post COVID-19 context

is produced by:

ASCAME - The Association of the Mediterranean Chambers of  
Commerce and Industry

&

Chamber of Commerce, Industry, Services and Navigation of  
Malaga

With the involvement of:

BCC - Barcelona Official Chamber of Commerce, Industry, Services and  
Navigation

CCIS - Sfax Chamber of Commerce and Industry

Chambre de Commerce et d'Industrie Région Fès-Meknès

CCIBML - Chamber of Commerce, Industry & Agriculture of Beirut and  
Mount Lebanon

## Special thanks:

To all institutions that contributed to this paper with their participation on the Sector Alliance Committee webinar on Sustainable Tourism, December 2020

BCC- Barcelona Official Chamber of Commerce, Industry, Services and Navigation

CCIB – Chamber of Commerce, Industry and Agriculture of Beirut and Mount-Lebanon

GSTC – Global Sustainable Tourism Council

JITOA – Jordan Inbound Tour Operators Association

IHRA – International Hotel Restaurant Association

WWFNA - WWF Mediterranean North Africa

CRPM – Conference of Peripheral Maritime Regions

CCI – Chamber of Commerce and Industry of Oran

# Sector Strategic Paper

## Industry outlook: Sustainable Tourism in the Mediterranean in the post COVID19- context

is produced by



ASSOCIATION DES CHAMBRES DE COMMERCE ET D'INDUSTRIE DE LA MEDITERRANEE  
ASSOCIATION OF THE MEDITERRANEAN CHAMBERS OF COMMERCE AND INDUSTRY  
جمعية غرف التجارة والصناعة للبحر الأبيض المتوسط



With the involvement of



In the framework of the EBSOMED project



Project funded by the  
EUROPEAN UNION

The EBSOMED project is led by BUSINESSMED within a consortium of six partners.

**BUSINESSMED**

Union of Mediterranean Confederations of Enterprises



EUROCHAMBRES



ASSOCIATION DES CHAMBRES DE COMMERCE ET D'INDUSTRIE DE LA MEDITERRANEE  
ASSOCIATION OF THE MEDITERRANEAN CHAMBERS OF COMMERCE AND INDUSTRY  
جمعية غرف التجارة والصناعة للبحر الأبيض المتوسط



Deutsch-Arabische  
Industrie- und Handelskammer  
German-Arab  
Chamber of Industry and Commerce  
الغرفة الألمانية العربية للصناعة والتجارة