



PROFILE OF SUSTAINABILITY IN SOME MEDITERRANEAN TOURISM DESTINATIONS 2nd coordination meeting

Minutes. 2nd coordination meeting of the project.
Cabras - MPA Penisola del Sinis - Isola di Mal di Ventre
(Sardinia, Italy), 25-26 of June 2010

Julien Le Tellier, Plan Bleu
With the collaboration of Ioannis Spilanis, University of Aegean (Greece)

Translated from the French version

Plan Bleu
Regional Activities Centre

Sophia Antipolis
July 2010

INTRODUCTION	3
1. Reminders about the objectives of the project	3
2. Objectives of the Cabras meeting	3
TECHNICAL REPORT.....	4
1. Main guidelines of the project.....	4
1. Finalize reports on steps 1 & 2.....	4
2. Guidelines for the progress reports on steps 3 and 4.....	5
3. Guidelines for the progress reports on steps 5	5
4. Guidelines for the final reports.....	5
5. Terminological clarifications	6
6. Methodological clarifications and alternatives considered to bridge the difficulties of collecting quantitative data	6
ANALYTIC REPORT	8
1. Hybridization of the tourism destinations types	8
2. Expectations for next steps	9
3. Messages for the development of sustainable tourism.....	9
3.1. Supporting the development of emerging destinations: for integrated development of Mediterranean tourism	9
3.2. Territorial planning and regulation for “sustainable economic growth” of tourism activities	10
3.3. Use or / and environmental conservation of protected areas	10
3.4. Other points of discussion and possible recommendations	10

INTRODUCTION

The minutes of the second coordination meeting of the project “profile of sustainability in some Mediterranean tourism destinations” are structured in two parts:

- Technical report: summary of the main objectives and steps of the project, terminological and methodological clarifications;
- Analytical report: main points of discussion during the meeting, elements of synthesis, reminders about guidelines and next steps of the project, messages to target audiences (government, local authorities, tourism operators...).

After the kick-off meeting of the project (Athens, UNEP / MAP, October 2009), the second coordination meeting was organized by Plan Bleu, in collaboration with the Coastal Conservation Agency of the Autonomous Region of Sardinia as well as the Marine Protected Area of the Municipality of Cabras. This mid-term meeting represented an intermediate stage of the project.

1. Reminders about the objectives of the project

The project aims at assessing the economic, social and environmental footprint of tourism activities thanks to the analysis of twelve destinations in eight Mediterranean countries.

Plan Bleu counts on Ioannis Spilanis (Economist, University of Aegean) for coordinating the group of eight national experts carrying out the case studies.

The “profiles of sustainability” are appraisals of various situations, in terms of “maturity” of the destinations, spatial and temporal distribution of tourist flows, valuation of local opportunities, trends and means of diversification of tourism activity.

Finally, the objective is to propose options aiming at improving the economic performance of the sector, allowing a more equitable distribution of tourism incomes, as well as the well-being of local populations and mitigating environmental pressures and damages.

2. Objectives of the Cabras meeting

The Cabras meeting mainly aims at:

- Presenting to the experts group the progress report of the project and the first synthesis elements; to validate and/or correct the destinations’ typology.
- Presenting and discussing the first results (steps 1 to 3 of the project).
- Clarifying the methodological framework as well as the terminology for the used variables.
- Debating about the methodological difficulties and the considered alternatives, as well as the perspectives for the next steps.

TECHNICAL REPORT

According to the methodological framework jointly validated in October 2009, the steps of the project are:

- Steps 1 and 2 (done): detailed presentations of the destinations and identification of the driving forces of tourism activities. This approach aims at characterizing and classifying the destinations (typology);
- Step 3 (on-going, reports expected for July 30th): results and performance of tourism activities;
- Step 4 (on-going, reports expected for July 30th): impacts of tourism activities;
- Step 5 (September 30th): proposals for policy measures to improve the sustainability of tourism.

Steps 1 to 4 aim at collecting available information to compare the various destinations. The final reports (December 15th) will summarize the analysis of the destinations.

1. Main guidelines of the project

The project aims at highlighting the positives and negatives experiences in each destination with a retrospective approach over the past 20 years.

Key questions:

- What is the knowledge about positive and negative experiences / best practices and success stories? What about the successes and failures? In which contexts?
- Exploring ways to develop tourism while protecting the environment?
- Exploring ways to improve the economic performance of tourism for the well-being of local populations, while minimizing and controlling environmental pressures and damages?
- How to develop new sites in a rational way?
- Given the key issues identified, what are the major challenges for the sustainability of the destinations?

Two levels of analysis:

- A factual level: data collection, filling tables of variables, calculating indicators;
- An analytic level: graphical representations of data, as well as comments in order to have a synthesis about the state of sustainability of the studied destinations.

1. Finalize reports on steps 1 & 2

Requests made to experts following the presentation of the first progress report by Ioannis Spilanis:

- Confirm or modify the description of the destinations (p. 4-6). The experts are asked to insert the corrections to be made in the Excel tables and reports written by Ioannis Spilanis (using track changes).
- Verify and complete data in the Excel table in Annex I of the report I written by Ioannis Spilanis;
- Correct the contradictory data between the reports and the Excel tables provided by the experts;
- Provide their expert's assessment concerning the qualitative characteristics and general trends of the destinations: Annex III of the report I written by Ioannis Spilanis.

2. Guidelines for the progress reports on steps 3 and 4

It is important to distinguish:

- On the one hand, the estimation of tourism results (step 3), focusing on tourist spending, direct employment as well as use of natural resources, and the estimation of the performance of tourism activities (expenditure per night, consumption of resources, generated waste per night...);
- On the other hand, the estimation of the “weight” / impacts of tourism activities within the destination: direct and indirect economic benefits of tourism, impacts of tourism on the population (demographic variables) as well as on the environment of the destination from the results of step 3. Note: the evolution of the population and demographic structure belongs to the step 4: assessing the impact of tourism on local societies.

3. Guidelines for the progress reports on steps 5

- Initial assessment of the sustainability of the destination from the information provided in the reports 1 to 3, focusing on common themes for all the profiles of sustainability:
 - o coastal management, urbanization and tourism impacts on the city;
 - o Use of resources: water, energy, land, etc.
 - o Management of wastewater and solid waste;
 - o Protection of natural areas, enhanced value of cultural heritage.
- Describe the weaknesses and strengths of each destination on supply, demand, market organization, outcomes and impacts of tourism, as well as opportunities and threats for each destination; the SWOT analysis could be a good tool to carry out this appraisal.
- Submit proposals for policy measures to make the destinations “more sustainable”, taking into account the target audience of the project results: public authorities and operators.

4. Guidelines for the final reports

The final reports have to provide a synthesis of the four progress reports by the articulation of the both levels mentioned above.

The final reports have to be structured in 6 chapters: (1) description of the destination, and the national and local contexts, (2) tourism as a driving force, (3) results and performance of tourism, (4) impacts of tourism on the destination, (5) policy measures to improve sustainability of the destination, (6) systemic analysis of the tourism destination (see scheme in the ToR). For the drafting of final reports, it is asked to summarize the progress reports relating to the steps 1 to 5, by integrating the qualitative characteristics (Annex III).

Systemic analysis of tourism destinations: roles, influences and interactions of different actors, links with the main outcomes and impacts. This analysis presents, for each destination, the role of external actors (tourists, investors, tour operators, low cost airlines companies, international organizations, NGOs, etc.) and internal actors (national stakeholders, local and national authorities, local and national NGOs, etc.). See the conclusions of the report I written by Ioannis Spilanis.

5. Terminological clarifications

- Tourism area is the continuous area which includes the touristic facilities of the destination, particularly tourism accommodations and secondary homes, as well as services and tourism infrastructures. Be careful about the boundaries of the tourism area: very large areas (e.g. extensive forests in the hinterland of Alanya) minimize the environmental pressures.
- Secondary homes are the houses and apartments occupied by non-permanent residents and / or rented to non-residents. To estimate the number of beds, number of secondary homes must be multiplied by an estimation of the number of beds per secondary homes (average): 4 to 6 persons according to countries and destinations (to be specified by each expert).
- Need for distinguish operated beds and available beds: the variable “number of beds” is the number of operated beds in August (peak).
- Experts agree “5 campsite places equivalent 1 hotel bed”: need to identify the number of places and not only the surface of campsites.
- By “investment” we mean investment in tourism infrastructure: accommodations, attractions. It is necessary to know the source of investments: (a) public and / or private; (b) international and / or domestic (national and / or local). We do not take into account public investment in infrastructure, equipment and utilities: water, sanitation, electricity, roads, ports, airports, hospitals, etc.
- The distinction between “industrial” and “artisanal (small-scale)” tourism refers to the dominant mode of production in tourism businesses and accommodations. In the first case (industrial tourism), we classify the large companies that use modern systems of organization and management with a clear division of work between different departments, a specialized manpower as well as modern marketing methods. In the second case (artisanal tourism), we classify the small-scale / family / “traditional” businesses.

Ioannis Spilanis can provide to the experts more terminological clarifications: definitions of variables.

6. Methodological clarifications and alternatives considered to bridge the difficulties of collecting quantitative data

- Need to present the national context and not only microeconomic determinants, even if it is not included in the ToR and in the methodological framework of the project. The policy measures will be grasped in the step 5 of the project. Previous studies of Plan Bleu specified the national contexts. See also WTTC country reports at the following link:
http://www.wttc.org/eng/Tourism_Research/Economic_Research/Country_Reports/.
- Conflicting data (different sources, reliability) and difficulties for recovering missing data.
- Difficulties for collecting micro-local data: e.g. Cabras where data are collected at the provincial level and not at the municipality scale.
- Difficulties for assessing the revenue generated by the official tourism centres reserved to civil servants and companies’ staff.

- Difficulties for quantifying the performance and economic results for secondary homes and guest houses. The qualitative information and rough estimates provided by the experts will be useful to assess the informal activities and the business in the secondary homes.
- Alternatives to bridge the difficulties of collecting quantitative data: rough estimates, qualitative assessments, according to experts, surveys of operators in Rovinj...
- Small flexibility on selected indicators and variables: the experts can change the indicator (asterisk, details in notes), add a line in the tables. However, the variables cannot case specific. The common methodological framework has to be followed by the experts in order to make graphical representations of quantitative data as well as comparisons between the studied destinations.

ANALYTIC REPORT

1. Hybridization of the tourism destinations types

Ioannis Spilanis submitted at the discretion of the expert the first results: progress reports about steps 1 & 2: presentation of the destinations and driving forces. The studied destinations are representative of Mediterranean destinations' diversity, as well as the levels of tourism development in the region. The various destinations do not seem to be comparable (maturity, size, accessibility) and show a hybridization of models. However, the sample allows making a first typology:

- Jerba (Tunisia), Torremolinos (Spain) and Alanya (Turkey) correspond to the “3S¹ International” “3S global” model: international airports, tour operators, stretched tourist season and duration of stay, standardized products, diversification without valorization of local potential. Given the discussions held at the Cabras meeting, El Alamain (Egypt) and Rovinj (Croatia) are classified in the “3S International” model even if they do not meet all the models' criteria.
- Tipaza (Algeria), Tetouan (Morocco), Marsa Matrouh (Egypt) represent the “3S National” type usually coupled with a city but with little diversification despite the existing potentials.
- Siwa Oasis (Egypt), Chefchaouen (Morocco), Rovinj (Croatia), Castelsardo and Cabras (Sardinia, Italy) are more « artisanal / traditional destinations », less planned, with various products relying on local factors and with opportunities that can be developed in a sustainable manner. Rovinj (Croatia) should also be classified in this type.

Finally, the residential destinations represent a new category. The real-estate promotion corresponds to the evolution of the life cycle of destinations: for example, Torremolinos and Tetouan shifting from “3S International” towards more “National” and “Residential - Real estate”.

Some comments from the debates at the Cabras meeting:

- If the distinction between “industrial tourism *versus* small-scale tourism / artisanal tourism / traditional tourism” seems relevant, the concept of “small-scale tourism” needs to be specified. Small-scale tourism destinations (emerging, low density) can be planned by governments and operators. According to Alessio Satta, “*we can plan to stay small*” and to control development. It is necessary not to mix up “small-scale / artisanal” and “unplanned”.
- If there are correlations between “industrial tourism - international mega-destination” and “small-scale tourism - national destination”, they are not systematic: for instance, El Alamain is a case characterized by an industrial tourism but with domestic tourists.
- Given the saturation of destinations “3S International” (Torremolinos) and the decline of a mega-destination (closed accommodations in Alanya, converted into hospitals and training centers), international destinations such as Tetouan and Torremolinos go towards more domestic tourism. In other cases, international clientele turn to domestic destinations: e.g. Cabras, Castelsardo...
- Rovinj is a specific destination (3S international or small-scale / artisanal?) where the banning of building in some coasts and islands are due to military reasons (and the previous political system): war in the Balkans avoided excessive human pressures on the coast during the 90s, although some areas now appear saturated (high densities).

¹ Sea, sand and sun.

- Regarding the driving forces, according to Jean Medhi Chapoutot, “*frequenting makes attractiveness*”: in Jerba, nothing predestined tourism development before the installation of the Club Med in the ‘50s.
- From the example of Jerba, water is presented as a major constraint for sustainable tourism. “*There is water in Jerba because there are tourists*”, with 150 km of pipes (water scarcity and high tourism consumptions in Jerba); however, the limits of this system should be pointed in terms of sustainability.
- According to Samir Grimes, “*Tourism is affected by the other sectors*”: coastal erosion in the wilaya of Tipaza is not attributable to the development of tourism but rather to unplanned urbanization, industrial discharges in the Marine and fishing.
- The campsite does not lead to the same pressures than other tourist accommodation: any building, moderated water consumption. However, human pressures are high on the beaches and on the road.

2. Expectations for next steps

The experts discussed the relevance of a prospective approach taking into account the development plans initiated by the various institutions and operators. The project focuses more on a retrospective approach to produce detailed appraisals: analysing developments over the past 20 years in order to highlight the risks of current trends (saturation of land resources, transfer of water over long distances...). Experts have to focus on trials and errors, as well as positive feedbacks, good practices and their potential “replicability”.

3. Messages for the development of sustainable tourism

3.1. Supporting the development of emerging destinations: for integrated development of Mediterranean tourism

According to Ioannis Spilanis -answering to the presentations of positive feedbacks in Sardinia-, we cannot do everywhere “low density - low impact” tourism, as well as we cannot ignore industrial and large destinations.

Small impacts should become major impact, particularly in emerging destinations (such as Croatia) and in countries where the policy of tourism development is recent (as in Algeria, where security problems have hampered the tourism boom in the past).

In the same vein, the current economic crisis can be seen as an opportunity to support tourism revival in accordance with the principles of sustainable development: accompanying measures, promotion of good practices.

We could promote destinations which are developing virtuous practices and measures of environmental conservation, in relation to the objective of labelling the destinations regarding environmental quality (MSSD orientation) or a charter in a first step.

This approach of *territorial marketing of the destinations* aims to create wealth and jobs as well as to protect environmental wealth. For example, the MPA of Cabras can be considered as a vector (or an engine?) for the development of sustainable tourism in the Mediterranean.

3.2. Territorial planning and regulation for “sustainable economic growth” of tourism activities

Among the current policies of the South and East Mediterranean Countries, tourism is chosen as a way to diversify the economy, but we need to keep in mind the issues of sustainability as well as environmental and social cost. Anticipating in order not to regret requires to link economic performance and environmental impacts, which is central in the project.

Jean Mehdi Chapoutot calls for a “sustainable economic growth of tourism activities”; measuring the sustainability of economic growth means not to retain only quantitative variables but also qualitative analysis.

More globally, main messages should focus on regulating the growth of tourism, the need to couple together this growth with the mitigation of environmental damages, as well as the need of assessing the environmental cost of tourism activities to be related to the incomes of tourism: it is the objective of the project!

Finally, according to Jean Mehdi Chapoutot, tourism has been an engine for development and should be considered today, in link with its transversality, as a vector for development.

3.3. Use or / and environmental conservation of protected areas

The debate on the compatibility between frequenting and environmental conservation of protected areas shows that tourism seems to be associated to pilot operations of environmental conservation (Cabras, Tipaza...), which seems more difficult when considering other sectors such as industry for instance.

3.4. Other points of discussion and possible recommendations

- Towards business strategies aiming to full fill low season with business tourism (conferences, meeting facilities,...).
 - Tourism consuming a lot of energy, we should encourage policies to control energy consumption and the upgrading of tourism accommodations.
 - Climate change will affect coastal destinations and resorts: risk of loss of beaches. What strategies of adaptation: protection or retreat?
-



Project “Profile of Sustainability in some Mediterranean tourism destinations”

Plan Bleu
In collaboration with the
Coastal conservation agency of Sardinia and the
Marine Protected Area of the Municipality of Cabras

2nd Coordination Meeting
Cabras (Sardinia, Italy), 25-26 of June 2010

Agenda

Friday 25 of June 2010

08:30-9:00	Welcome of the participants
9:00-9:30	Opening speech Alessio Satta, Agenzia Conservatoria delle Coste - Regione Autonoma della Sardegna Lorenzo Mascia, Director / Manager of the Cabras Marine Protected Area Meeting objectives Julien Le Tellier
9:30-11:00	Session 1: tourism models' hybridization and destinations typology
9:30-10:00	Presentation of the first results - Step 1 and 2 of the project Ioannis Spilanis
10:00-11:00	Discussion
11:00-11:20	Coffee break
11:20-13:05	Session 2: Evolutions in the life cycle of international tourism destinations
11:20-11:35	Jerba (Tunisia): The « 3S International » emblematic model Jean Mehdi Mohammed Chapoutot
11:35-11:55	Discussion about Jerba (Tunisia)
11:55-12:10	Alanya (Turkey): A « mega destination » developed recently Çevat Tosun
12:10-12:30	Discussion about Alanya (Turkey)
12:30-12:45	Rovinj (Croatia): Can the environment protection strengthen the attractiveness of an artisanal and seaside destination with international customers? Zoran Klarić
12:45-13:05	Discussion about Rovinj (Croatia)
13:05-14:30	Lunch break
14:30-16:30	Session 3: Sustainability of tourism destinations with national customers
14:30-14:45	Tipaza (Algeria): What control of urbanization and “artificialization” of the coastline in a pilot zone of environment conservation? Samir Grimes
14:45-15:05	Discussion about Tipaza (Algeria)

15:05-15:20	Castelsardo and Cabras (Sardinia, Italy): What compatibility between the environment protection and the valorization of exceptional sites? Alessio Satta
15:20-15:40	Discussion about Castelsardo and Cabras (Sardinia, Italy)
15:40-15:55	Marsa Matrouh, El Alamain and Siwa Oassis (Egypt), emergence of a “coast - hinterland” organized trip: which complementarities? Adel Rady
15:55-16:15	Discussion about Marsa Matrouh, El Alamain and Siwa Oasis (Egypt)
16:15-16:30	<i>Coffee break</i>
16:30-17:30	General discussion – Sessions 2 and 3
17:30-20:00	<i>Tour of Cabras</i>
20:30	<i>Dinner</i>

Saturday 26 of June 2010

9:00-10:20	Session 4: The tourism shift towards residential and the diversification for a sustainable tourism
9:00-9:15	Torremolinos (Spain): international and/or residential destination? Enrique Navarro Jurado
9:15-9:35	Discussion about Torremolinos (Spain)
9:35-9:50	Tetouan coastline and Chefchaouen hinterland (Morocco): what perspectives of sustainability for a complementary destination binomial? Study: Mohamed Berriane (excused) - Presentation: Laura Martinez (Plan Bleu)
9:50-10h20	General discussion – Session 4
10:20-10:40	<i>Coffee break</i>
10:40-11:40	Session 5: Socio-economic & environmental results of the tourism
10:40-11:00	Presentation of the provisional results for the Step 3 of the project Ioannis Spilanis
11:00-11:40	Discussion
11:40-12:30	Session 6: Tourism impacts and policies measures for sustainable tourism
11:40-12:00	Reminder of the objectives relating to step 4 & 5 of the project Ioannis Spilanis
12:00-12:30	Discussion
12:45-14:15	<i>Lunch break</i>
17:00-19:00	Session 7: Round table with the local stakeholders of Cabras
17:00-17:30	Welcome from regional and local authorities Cristiano Carrus, Sindaco di Cabras Giuliano Uras, Assessore regionale, Difesa dell’Ambiente Alessio Satta, Direttore, Agenzia Conservatoria delle Coste
17:30-18:00	The Plan Bleu’s project & the evaluating framework of the tourism activity Julien Le Tellier and Ioannis Spilanis
18:00-18:15	Presentation of the sustainable tourism strategy of Cabras Lorenzo Mascia, Director, Marine Protected Area of Cabras
18:15-19:00	General discussion. End of the meeting



Réunion d'experts « Tourisme - Profils de durabilité »

Cabras (Sardaigne) (Italie), 25-26 juin 2010

LISTE DES PARTICIPANTS

Jean Mehdi CHAPOUTOT

Consultant

Tél/Tel. +216 (71) 885 086

E-mail jmmc@gnet.tn

7, rue Tahar El Kassar
2092 TUNIS
El Manar 2
TUNISIE

Samir GRIMES

Enseignant – Chercheur

Tél/Tel. +2137757711

E-mail samirgrimes@yahoo.fr

Ecole Nationale Supérieure des
Sciences de la Mer
et de l'Aménagement du Littoral
(ENSSMAL)
Cité 64 logements, Bt D, N° 9
Ouled Fayet
ALGERIE

Zoran KLARIĆ

Scientific Advisor

Tél/Tel. +385 91 3909 647

Fax +385 (1) 3909 667

E-mail zoran.klaric@iztsg.hr

Institute of Tourism
Vrhovec 5
10000 ZAGREB
CROATIE

Julien LE TELLIER

Chargé de mission Analyses
territoriales

Tél/Tel. +33 (0)4 91 55 48 15

E-mail jletellier@planbleu.org

Plan Bleu
15 rue Beethoven
06560 Sophia Antipolis
FRANCE

Laura MARTINEZ RUBIO

Chargée de mission

Tél/Tel. +33 (0)4 92 38 71 34

Fax +33 04 92 38 71 31

E-mail lmartinez@planbleu.org

Plan Bleu
15 rue Beethoven
06560 Sophia Antipolis
FRANCE

Enrique NAVARRO JURADO Tél/Tel. + (32)952-133250
Teacher and Researcher Fax + (34)952-132092
E-mail enavarro@uma.es

Escuela Universitaria de Turismo
Dpto. Geografía
Campus de Teatinos s/n
29071 Málaga
ESPAGNE

Aly Ahmed RADY Tél/Tel. +20 012 2109790
Chairman/Managing Director Fax +20 224042731
E-mail adelrady2@hotmail.com

Marsa Alam for Tourist
Development Co.
3 Abbas Alakkad Street
Nasr City
11757 Le Caire
EGYPTE

Alessio SATTA Tél/Tel. +39 070 606 5558
Directeur général Fax +39 070 4509707
E-mail alesatta@regione.sardegna.it

Conservatoria delle Coste della
Sardegna
v. Mameli 96
09123 Cagliari
ITALIE

Ioannis SPILANIS Tél/Tel. +3022510 36229
Professor Fax +30 (225) 10 36 290
E-mail ispil@aegean.gr

University of the Aegean,
Department of Environment
Laboratory of Local and Islands'
Development,
University Hill ex-Xenia Building
81100 Mytilini
GRECE

Cevat TOSÚN Tél/Tel. +90 326 618 4930
Researcher Fax +90 (326) 618 49 32
E-mail cevattosun@hotmail.com

Mustafa Kemal University
School of Tourism & Hospitality
Numune Mah.
31200 Iskenderun
TURQUIE