



PROJECT: "PROFILES OF SUSTAINABILITY IN SOME MEDITERRANEAN TOURISM DESTINATIONS"

3rd Coordination Meeting
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Minutes - Working paper

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Content

FOREWORD	3
CONTEXT	4
PROJECT OBJECTIVES (REMINDER)	4
THE PROJECT'S STATE OF PROGRESS AND PERSPECTIVES.....	5
OBJECTIVES OF THE 3RD COORDINATION MEETING	5
REPORT ON THE DISCUSSIONS.....	6
Challenging the classic model of mass beach tourism?.....	6
Hotel versus real estate and residential accommodation.....	7
International tourism versus domestic tourism, and economic leakages	8
Impact of international tourism in terms of the perceived invasion by local businesses	8
What does explain the variances between data collected at destination level, and national databases published by international bodies	9
Observations and additional recommendations	9
APPENDICES	11
Jerba (Tunisia), by Jean Mohamed Mehdi Chapoutot	11
Torremolinos (Spain) by Antonio Jose Rodriguez Morillo and Cristina Tanase, representing Enrique Navarro Jurado.....	12
Alanya (Turkey), by Cevat Tosun	13
Tetouan coastal area and balance with the Chefchahouen hinterland (Morocco), by Mohamed Berriane.....	13
Tipasa (Algeria) by Samir Grimes.....	15
Matruh, Al Alamain, Siwa Oasis (Egypte), by Adel Rady.....	15
Cabras and Castelsardo (Sardinia, Italy), by Alessio Satta.....	16
Rovinj (Croatia), by Zoran Klaric.....	16

Foreword

In his introduction to the third coordination meeting of the project entitled "Profile of Sustainability in some Mediterranean tourism destinations", Blue Plan Director Henri-Luc Thibault placed this meeting of experts in the context of the Mediterranean region's current upheavals, and recalled the uncertainties as to the extent of these upheavals, as well as the future of the region.

While it might seem somewhat incongruous to organise a meeting on tourism given prevailing concerns both in Southern Mediterranean countries (*The Arab Spring*) and further North (the Greek austerity plan and various recent general strikes spring to mind), there can be no doubt that these upheavals raise serious questions regarding the refusal of a "selective" form of development that does not do justice to the masses. Indeed, this form of development has a tendency to be quickly monopolised by a select few, thereby failing to provide the Mediterranean's young generation with any tangible prospects.

As a result, it is the expression of an unsustainable form of development that is a cause for concern. Even if nobody had predicted the recent historic, sweeping changes, Blue Plan and other partners had repeatedly warned decision-makers – via different means – of worrying trends and of their resulting risks for the region.

In this specific context, the "wake-up of the territories" is highly significant, and raises questions concerning both their relationship with the authorities, and their role – both local and at large – in national policies.

Mediterranean countries thus face a number of challenges: economic and social convergence has become a necessity given that disparate living standards combined with unequal access to basic services represent vectors for instability, to say the least. Economic, social, political and regional integration is therefore essential if solutions to the region's financial, socio-economic and political crises are to be found. Faced with cash supplies that have all but run dry, solidarity is called for towards Spain, Greece, and no doubt Italy, all of which are now subject to unprecedented budgetary cuts.

Lastly, these economic, social and political upheavals combined with the "wake-up of the territories" and the need for convergence dictate thought processes that break away from cyclical contingencies, reasoning instead in the medium to long term. This is exactly what the Blue Plan seeks to do by mobilising its networks of experts to think up "possible futures" for the Mediterranean.

Ultimately, while tourism is undoubtedly a vector for growth, we must sit down together and rethink our tourism development models. In conjunction with the Blue Plan's network of experts, these medium and long-term thought processes must lead to a re-examination of the tourism development models. This is the objective of the "Profile of Sustainability - Mediterranean Destinations" project, and represents the subject of this third coordination meeting.

Context

After the kick-off meeting (Athens, October 2009) and the intermediate meeting¹ (Cabras, June 2010), the third coordination meeting for the Blue Plan project entitled "Profile of Sustainability in some Mediterranean tourism destinations" was held in Marseilles on 15 - 16 June, 2011.

It must be acknowledged that the project's terms of reference were highly ambitious. The undertaking was all the more difficult given that it was based on a promising experimental method that was not without certain difficulties in terms of access to data and consent on the variables (cf. the minutes of the Cabras meeting, 2010), which in turn engendered a great deal of collaborative exchange. Despite these constraints, collaboration within the group of experts worked well, with some particularly active partnership dynamics.

Upon completion of this project, the relevance of the approach decided on would seem to be confirmed given that the usual bromide and lip service were transcended via case studies that relate directly to the field and to the proven reality of the destinations concerned. This further underscores not only the added value inherent in systemic and territorial approaches, but also the pertinence of the varied sample of selected destinations.

Project objectives (reminder)

The objective of the Blue Plan "Profile of Sustainability - Mediterranean Destinations" project is to assess the economic, ecological and social footprint of tourism activities based on an analysis of 11 destinations in 8 countries that lie to the North, South and East of the Mediterranean².

Based on a reasoned and disparate sample of Mediterranean destinations, the "profiles of sustainability" represent diagnostics of various situations in terms of the destinations' maturity and life cycle (longitudinal approach), the spatio-temporal distribution of the tourist flows and the effects of seasonal variations, the results and economic benefits for local populations, and the development of each territory's local potential.

Based on a variant of the DPSIR approach³, the methodology was drawn up by Ioannis Spilanis (Economist, University of the Aegean) who has provided the Blue Plan with his support in coordinating the group of experts that carried out the case studies.

The underlying goal is to suggest possible options for improving the sector's economic performance, providing a more balanced distribution of tourism revenue, contributing to the prosperity of local businesses, controlling pressure on the environment and minimising environmental damage.

¹ The intermediate meeting was organised in collaboration with the *Sardinian Coastal Conservation Agency* and the *Marine Protected Area of the Municipality of Cabras*.

² Torremolinos (Spain), Castelsardo and Cabras (Sardinia, Italy), Rovinj (Croatia), Alanya (Turkey), Al Alamein, Marsa Matruh and Siwa oasis (Egypt), Jerba (Tunisia), Tipasa (Algeria), Tetouan Coastal Area (Morocco).

³ Driving forces – Pressures – State – Impacts – Responses.

The project's state of progress and perspectives

- Blue Plan has laid out the 9 final case study reports; they will be accessible on its Website before the Steering Committee of the "Tourism and sustainable development in the Mediterranean" activity program scheduled for 22 September 2011 in Sophia-Antipolis.
- Subsequent to the evaluation of the provisional versions, the reports on the "Synthesis of the Profiles of Sustainability" and the "Regional Framework for promoting the Mediterranean" are currently being finalised.
- The Blue Plan has entrusted the writing up of the final case study report syntheses to Loïc Bourse (PhD graduate, University of Provence, Aix-Marseille, France). Now underway, this task will be finished by the end of September 2011.
- In September 2011, the Blue Plan will submit to the members of the Steering Committee the dissemination ways envisaged: distribution of reports and syntheses on the Blue Plan's Website, publishing of the reports written by Ioannis Spilanis in the "Blue Plan Papers" collection, regional conference for exchanging experiences by the end of 2011.

Objectives of the 3rd coordination meeting

The project's third coordination meeting had two main objectives:

- Setting out the results and conclusions of the final case studies reports with a view to underscoring the proposals and recommendations in terms of "political measures" (step 4 of the project), the analyses of the actor systems, the SWOT⁴ analysis, and the lessons learnt in terms of good practices for improvement based on the feedback of experiences observed in the 11 destinations concerned. The experts' presentations were also intended to polish the intermediate synthesis of the profiles of sustainability in order to strengthen the Blue Plan's messages delivered at the end of the project.
- Submitting the main results of the reports (being finalized by Ioannis Spilanis) for assessment and debate by the group of experts.

The meeting was held in three sessions (see the appended agenda):

- Session 1: Reporting of the case studies by the experts.
- Session 2: Presentation of the "Synthesis of the profiles of sustainability" report, and discussion.
- Session 3: Presentation of the "Regional framework for promoting the Mediterranean" report, and discussion.

⁴ Strengths, Weaknesses, Opportunities, Threats.

Report on the discussions

Challenging the classic model of mass beach tourism?

Following the presentation of Torremolinos, Mohamed Berriane explains that this destination has represented a model for tourism development in the Southern Mediterranean. However, this model is not a sustainable one, and thus represents "a brick wall into which we are driving head on" without anticipating the environmental impact. There are already certain irreversible phenomena in Southern Mediterranean countries: for example, dunes that have been cut off from the beach by various developments and constructions can no longer be rehabilitated. Since dunes naturally protect beaches, they should always be one and the same. The issue of water is another area of concern: a great deal of waste water, a great deal of water loss. Thus, for example, by building private wells, hotels not only effectively evade statistics, they also evade paying for the water at its fair price, and taxation.

Adel Rady adds that there are many examples of countries that depend on mass tourism and that have underestimated the value of their heritage. This can be explained by international prevailing trends, and by national policies for attracting overseas tourists, no matter what the environmental fallout. Indeed, how can a country like Egypt resist the lure of building developers when roughly half of its 80 million inhabitants live below the poverty line? The alternatives must undoubtedly be sought in balanced solutions that acknowledge the need to maintain/preserve on the one hand, and to develop/enhance the accommodation capacity of the Mediterranean territories on the other hand.

Experts thus underscore the limits of the model founded on the mass tourism resort whose main attraction is its beach, while emphasizing the tourism sector's high degree of flexibility that is nevertheless dependent on tourist flows and revenue. How then can we reconcile the creation of jobs and revenue to escape poverty without destroying the potential on which tourism development is based? Accordingly, proposals by the Blue Plan's experts must be realistic and attainable.

In any event, self-contained tourism is on the increase. For example, big groups no longer invest in building hotels and holiday villages, but in their management. The Internet has also brought about changes in consumption and behaviour; the nature of the channels has changed given that there are now multiple demands from the same tourist, who may well spend a week in Djerba in the winter, and a fortnight travelling around Croatia in the summer.

Hotel versus real estate and residential accommodation

In many Mediterranean destinations, the classic hotel is on the decline compared with the growth in residential tourism and real estate promotion (secondary homes and alternative accommodation such as B&B, renting someone's home, apartments, villas, etc.).

Local authorities and/or other local institutional stakeholders are giving in to the lure of real estate developers (creation of jobs in the building industry, tax resources), meanwhile municipality expenses have increased and are out of sync with supplementary urban taxes due to residential excess.

In Morocco, for example, there is a gradual shift away from standard tourism development projects (hotel complexes) toward real estate operations (residential sector), often including an "alibi hotel" in the middle of the residential project. Mohamed Berriane explains how in tourism projects that manage to strike a balance between the hotel and residence aspects, in the end the hotels are simply not built, and may even give way to other types of buildings (such as supermarkets).

In Croatia, a country set to become the 28th member of the European Union in 2013, new construction legislation has been adopted: the law concerned makes small distinction between secondary residence and permanent residence and enables change of tourism accommodation capacities into secondary residences. However, the construction of secondary residences is becoming a serious problem that is putting coastal urban sprawl into overdrive, with horizontal urban extensions that are now encroaching on natural areas, farming land and forests. For Zoran Klaric, this is the number one environmental problem in the coastal areas as the main tourism resource of Croatia.

Experts generally agree that leaving the market to its own devices equates with unchecked construction. Faced with uncontrolled growth in residential construction, several experts believe that there is good reason to condense destinations already in the throes of urbanisation before opening up new areas to tourism: this would help concentrate environmental impacts on confined territories and preserve the increasingly rare natural areas.

Basically, rather than incriminating new forms of accommodation, it would seem important to reconsider them as an answer to emerging demands, often domestic, family-based and popular, and corresponding to the aspirations of new sources of customers: see Berriane, 2010⁵. It is necessary to find possible ways of integrating these new, often informal offers inside established circuits, and thus to impose them as fairly as possible (source of local tax).

⁵ "Tourisme des nationaux, tourisme des étrangers : Quelles articulations en Méditerranée ?" (*National tourism, international tourism: what balance in the Mediterranean?* a collective work coordinated by Mohamed Berriane, Published by the Faculty of Literature and Social Sciences at Rabat, and the European University Institute of Florence).

International tourism versus domestic tourism, and economic leakages

Adel Rady points out that care must be taken with hasty interpretations of the distinction between international tourism versus domestic (or national) tourism: some forms of international tourism can have significant direct local benefits (Cabras, Castelsardo), whereas, conversely, the benefits of national tourism may be mainly profitable to tour operators (El Alamain, Marsa Matruh).

Consequently, questions that are more pertinent than simply opposing "internal *versus* external demand" involve the actual structure of the offer, and dependencies in relation to external actors: Where does the revenue end up? What are the forms of economic leakages? What are the benefits for local businesses?

South and East Mediterranean countries tend to favour international tourism given the inflow of foreign money, however, in many cases, this money is promptly re-exported to the tourists' home countries (in the North). As a result, international tourism in SEMCs brings in money and creates jobs... in banks, rather than in the destinations!

Zoran Klaric qualifies these observations, adding that while Croatian businesses bring in foreign money, Croatian hotels are often supplied from overseas: Whereas Croatia used to export its meat; it now imports it and it also imports wine from Bulgaria, Montenegro, Macedonia, Italy, Chile, etc.

According to Antonio Jose Rodriguez Morillo, international tourism is very important on the Costa del Sol (Andalucía, Spain) because it adjusts the trade balance. The same cannot be said for national tourism, even if it helps to readjust imbalances between the various sources of added-value production within national borders. The fact remains that international hotel chains participate in economic leakage.

An attempt must thus be made to offset "self-contained tourism" by defining tourism models that limit economic leakage, thereby keeping the revenue inside the destinations: the type of marketing implemented would appear to be a key factor in this respect.

Impact of international tourism in terms of the perceived invasion by local businesses

Jerba's tourist zone resembles a "*small ghetto*" with a low impact in terms of cultural clashes and in terms of the local populations' feeling of invasion; seeking to distribute international tourism across the entire national territory could have negative consequences.

According to Zoran Klaric, this distinction between international and national tourists is not as clear-cut for intra-European tourism: "*In Croatia, the international tourists look like us; the only important difference lies in the language. (...) International tourists are often much more environmentally aware, especially those from developed Western European countries*".

Adel Rady refers to the subtleties at play within national borders: "*At Marsa Matruh, a person from Cairo is considered as a foreigner!*"

What does explain the variances between data collected at destination level, and national databases published by international bodies

With regard to case studies and experts' opinions:

- Not all of the destinations studied are representative of the tourist industry at large in the countries of these destinations.
- National statistical systems provide international figures with estimates based on ratios, whereas experts collect data directly in the field and/or from local organisations: estimates *versus* enumerations/counts.
- The importance given to informal jobs and undeclared work represents a bias.
- The mobility of tourist industry employees from one destination to another during the year represents another bias. Consideration must also be given to the pluriactivity of those working in the tourist industry.
- Several of the destinations examined harbour a multitude of tourist accommodation micro-businesses that elude statistics and that are managed directly by their owners (family labour *versus* paid employment).

Observations and additional recommendations

"Develop commercial strategies for territorial marketing and support the industry's professionalisation in emerging destinations" that underscore the value of their historical, cultural and/or environmental heritage. Businesses are also advised to make greater use of the environment in their marketing strategies, while avoiding projects in which the environment may appear to be an "alibi".

"Consume locally and give preference to short channels" for the destinations' procurement and replenishment methods, since here too there is a degree of compatibility between the environmental and socio-economic stakes (they may converge); in parallel to the commercial exploitation of tourism in a given destination, local producers can no longer keep up with a level of demand that exceeds the offer. Moreover, beyond the fact that many tourists want to eat the same things on holiday as they do at home, globalisation has brought with it a standardisation / homogenisation of international cuisine, even if certain international restaurant chains promote local production in their establishments... Support must thus be provided to local producers to meet the demands of tourist establishments, just as tourists must be encouraged to consume local products. This "wake-up" involves three actions: **help** local producers meet tourist demands, **raise the awareness** of tourists regarding the need to consume local products, and **convince** the hotel operator to adopt these virtuous practices.

"Encourage local hotel operators to record their revenues in national banks to limit economic leakage": large hotel operators often hold bank accounts overseas to escape local taxation, among other reasons.

"Extend the duration of visitors' stays" (a) to improve economic performance, and (b) to limit environmental damage. Considering the greenhouse gas emissions that result from travel, then obviously a one-week stay will have a lesser impact than two three-day stays. The fragmentation of vacations is therefore harmful to the environment. However, travelling more slowly and less often is no doubt not going to meet with customer approval...

"Promote associative dynamics and involve civil society in the definition of labels or certifications for destinations", as well as in sustainable local development strategies, taking into account the criteria of the Mediterranean Strategy for Sustainable Development: for example, a Sustainable Tourism Master Plan for a given destination. This is all about making local territories accountable.

"Promote the definition of specifications for tour operator eco-labels", based more on voluntary instruments than regulatory ones. Operators must be made to see labels and certifications as a source of profit, not an additional constraint to legislation in force.

Regarding the "centralisation versus decentralisation" of policies and public initiatives, the experts explain that decisions taken by States to bring tourism to peripheral areas have, in some cases, led to sudden transformations in local communities (and their eviction). This is a social justice issue. However, in certain territories in SEMCs where there is still room for improvement as far as educating local populations is concerned, both the local inhabitants and certain decision-makers are not sufficiently competent for accommodating land-use management plans. The Southern Mediterranean's younger States have little experience in terms of democracy and its practices; in these contexts, rapid mainstream decentralisation can result in a worrying return to regionalism and tribalism faced with the fears caused by globalisation. Here, strong central government remains the guarantor of national solidarity, and must act as a safeguard in the face of increasing localism. The capacities of the local authorities themselves in terms of resources and experience can also pose a problem; once caught up in electioneering issues and at the mercy of influential voters, local authorities can make irreversible mistakes. Ultimately, if decentralisation can be promulgated, the responsibility of municipal councillors remains a long process that must be implemented in stages, and with long-term support. Finally, given the diversity of Mediterranean destinations, development models and institutional devices, a regional label for sustainable tourism is still something that must be invented to promote the image of the Mediterranean as a sustainable tourist destination.

Appendices

Jerba (Tunisia), by Jean Mohamed Mehdi Chapoutot

Jean Mohamed Mehdi Chapoutot recalls that while tourism is a visible activity, it is hard to discern and remains misunderstood.

In Jerba, the tourist zone represents 3% of the island's total surface area, and 20% of its coastline: It entails separate development, concentrated development, and "urbanised areas without urbanity".

Prior to the development of tourism, Jerba, an island without any towns, was a self-sufficient refuge turned towards its own culture, one where difficulties in terms of water supply were overcome simply using rainwater recovery tanks. Human occupation was organised around the *menzjel*, a closed family-based group. Jerba was an unwelcoming land, devoid of people (migrations). Its abandoned coastlines were hardly conducive to settlement and exposed to the dangers of the sea.

It was these empty, uninhabited coastlines that attracted the first developers and investors, in particular the Club Méditerranée: *sandy beaches just five hours from Paris*. With the development of tourism in the 1960s and the jobs created in its wake, Jerba not only became attractive, it also became an immigration zone. The island's former tendencies were thus reversed: its coastlines, once avoided and uninhabited, became recognised and attractive, while the backcountry in turn became deprecated.

Up until the 1990s, Monastir was the destination favoured by public authorities and by the President Habib Bourguiba for the development of tourism. It has since been replaced by Jerba, now Tunisia's leading tourist destination, and accounting for one fifth of the country's accommodation capacity.

However, with today's rising population pressure and lack of any clearly defined urban planning, the towns of Houmt Souk and Midoun have expanded anarchically into badly structured outskirts: the island's decision-makers have failed to anticipate the accommodation and travel needs of those employed in the tourist zone.

Moreover, Jerba has been particularly resilient faced with the consequences of external crises (such as the drop in visitors after September 11, 2001), however, today's situation is different and uncertain, since the current crisis is internal.

In addition, Samir Grimes explains that, each year, some 1 million Algerians take their holidays in Tunisia. However, in the summer 2011, following the Tunisian revolution, Algerian tourists are expected to stay on national soil or to go to other countries that are eager to make the most of the situation and increase their market share (such as Turkey).

Jean Mohamed Mehdi Chapoutot adds that the Libyans and Algerians who come to Tunisia for their holidays do so by car, without staying in hotels: they prefer residential accommodation.

Based on Jerba's profile of sustainability, the proposals and recommendations made by Jean Mohamed Mehdi Chapoutot fall into three categories:

- Protection of the coastline, with two additional options:
 - a) Saving the beach: artificial supply of sand, rehabilitation of dunes to limit coastal erosion;
 - b) Strategic retreat and limiting of sites along the coast.

- Securing the water supply and, as far as possible, developing the island's self-sufficiency in terms of drinking water, with three additional options:
 - a) Controlling consumption by tourists by reducing waste and rationalising certain abusive practices⁶;
 - b) Attaining self-sufficiency through the development of brackish water treatment plants.
 - c) Development of desalination of sea water.
- Territorial development, by underscoring the value of the island's centre, effectively alternating beach tourism and inland tourism. Thus, while the coastal tourist zone has benefited greatly from infrastructural investment, the impacts have been negative for the forgotten centre of the island. By taking an overall perspective of the island, imbalances between the coastline and the inland areas should be reduced.

Torremolinos (Spain) by Antonio Jose Rodriguez Morillo and Cristina Tanase, representing Enrique Navarro Jurado

Torremolinos, a pioneering resort on the Andalusia's Costa del Sol is renowned for its beaches, however intensive tourism development has severely impacted the environment: deviated rivers, eroded coastlines, receding beaches, etc.

Apart from its mountainsides, where construction is difficult, the entire area is now built up. As a result, this mass tourism destination, with its homogeneous offering of beach-oriented services, is now saturated. In this mature, albeit saturated destination, the environment has been sacrificed on the altar of profit.

Tourism development has helped create jobs and achieve gender parity, although the average household income in this region on the Southern fringes of Spain remains below national levels.

Nevertheless, this intensive tourism model is losing momentum, and is even falling into decline: drop in revenue between 2002 and 2009, drop in the number of person-nights per stay, drop in expenditure per tourist... Meanwhile, an increased offer in residential accommodation and in-home tourism has led to a drop in the number of person-nights in hotels and a drop in profits.

Moreover, in terms of Torremolinos' life cycle trend, domestic tourism is now taking over from international tourism, just as the residential accommodation offering is gaining ground to the detriment of classic hotel accommodation.

To revitalise the destination's tourism in line with sustainable development, the authors of the study on Torremolinos particularly recommend a qualitative consolidation of the offer to allow higher room prices as well as to increase tourist expenditure in general. Launched in 2000, the "Plan Qualifica - Costa del Sol" is part of this tendency that seeks to improve hotel categories: an increase in 3 and 4-star hotels over 2 and 3-star hotels.

In addition, other global measures as the commitment to a Green Costa del Sol, an outpost of changes in society which would be built on two pillars: the transformation in a city with zero consumption of CO₂ plus 100% renewable energy and new technologies. The change is profound,

⁶ Jean Mohamed Mehdi Chapoutot explains that regulations prescribe audits for hotels with an excessive consumption of water, however this kind of audit is never performed, which raises the question of the law's enforcement. However, while the problem exists in certain hotels, hotel operators are always looking to control their water consumption since hotel rates are very disadvantageous for high consumption levels.

from promoting a green mobility (public and private), CO2-neutral buildings, more space for pedestrians in the beach area and public spaces, bulking operations in central locations ... These changes are not immediate, it would be a 20-to-30 year plan and focused on zones to find the "demonstration effect", that is the rehabilitation of an area showing little by little that the project is viable and has the consensus of all parts (private and public).

However, while a jump in quality may lead to increased profit, it does not equate with an improved environmental impact.

Alanya (Turkey), by Cevat Tosun

The emergence of Turkey's Alanya destination dates back to the 1980s encouraged by public authorities (State) and private domestic and foreign investment.

The area's tourist establishments (hotels and clubs) are mainly concentrated along the coastline, indifferent to the wooded hinterland.

The clientele is international, mainly from the republics of the former Soviet Union.

The activity has seen rapid, unprecedented growth (134% between 1975 and 2009), thus helping to push back poverty, despite the seasonal effect on jobs in the tourist industry.

Nevertheless, there are already signs of saturation, with a noticeable drop in recent arrivals (due to the international crisis), and a population density that has gone from approximately 12.5 inhabitants per km² in the 1980s to 500 inhabitants/km² in 2008.

As a result, while net migration remains positive, it is on a downward slope; the destination is now less attractive for internal migration.

In terms of recommendations, Cevat Tosun believes that environmental considerations must be made a matter of priority, with participatory approaches in land-use planning.

Tetouan coastal area and balance with the Chefchahouen hinterland (Morocco), by Mohamed Berriane

The "Tetouan Coastal Area" destination is distinctive compared with Moroccan destinations in general: high proportion of national tourists, high seasonal variation⁷, and increase in residential accommodation over classic hotel accommodation, etc.

Drawing on the Tetouan Coastal Area's profile of sustainability, Mohamed Berriane suggests the prospect of a new brand image for Mediterranean destinations based on seaside products with a focus on the immediate backcountry, thus striking a balance between the Tetouan Coastal Area and the Chefchaouen hinterland. By balancing and articulating the coastline and the backcountry, the proposed product offers an interesting, innovative and ambitious dimension in terms of prospecting and even planning.

⁷ In fact, a portion of the employees alternate summer work in establishments along the Tetouan coastal area with low-season work in Southern Moroccan destinations.

This concept affords an improved spatial distribution of the tourism and a certain complementarity between two types of destination to ultimately define an emerging tourist product, one that integrates the mountainous hinterland in beach tourism to offer new concepts based on more far-reaching developments.

This approach to a "possible future", effectively redefining the balance between coastal and hinterland attractiveness, provides a pertinent solution to three considerations inherent in sustainable development:

- in terms of economic input for local companies;
- in terms of environmental impacts to limit the pressure on the coastline and to control its "balnearisation" and excessive concrete construction;
- in social and cultural terms by promoting exchange between tourists looking for authenticity and local companies, and by underscoring the value of the destination's natural, historical and cultural heritage.

Basically, the one keyword to remember in this case study is "substitution":

- substitution of international demand by national demand⁸;
- substitution of classic hotel accommodation by residential accommodation, leading to increased expenses for the municipality (expenses which have not always been evaluated in relation to employment created in the building sector) and relatively few job creations, even if this new form of accommodation needs to be incorporated and formalised as an answer to internal, family-based demand, while attempting to tax it to compensate for the expenses incurred (infrastructures, collection and treatment of waste, etc.);
- substitution of coastal areas by an increased integration of the hinterland in products that are otherwise mainly beach-focused. Linear tourism development renders the coastline artificial: from the initial "here and there" to the subsequent "everywhere", from the discontinuous to the continuous, in reference to cases of Spanish *urbanización* which can be a cause for concern in terms of excessive coastal development, artificial coastlines, monotonous landscapes and environmental impacts.

Mohamed Berriane also identifies an area in which beach tourism has expanded: to the East of the resorts on the Tetouan Coastal Area, random camping areas and "home-made" tourism initiatives have engendered tourist/recreational housing developments, no doubt heralding the end of "spontaneous tourism" in this part of Morocco's Mediterranean coastline. Consideration must now be given to a risk of contagion and coastal urbanisation in the southwest part of the Tetouan Coastal Area. The development of the western Rif coastline will no doubt need to be controlled and implemented according to a form of preservation that is yet to be defined, even if certain forms of cooperative tourism and eco-tourism appear to hold promise.

In the light of the massification of tourism along the Tetouan Coastal Area, the deterioration of the environment (drop in marine and land biodiversity, deforestation, disappearance of a wetland with biological and ecological significance) and the shift towards real estate speculation, Mohamed Berriane envisages two options:

⁸ The Tetouan Coastal Area is currently considered attractive by internal/domestic tourists, whereas the policies of the 1960s targeted the development of international tourism. Among the factors that explain this shift from international demand to domestic demand in the destination's life cycle: too few attractions except for the beach and the sun; a tour operator commercial policy that focuses on destinations elsewhere in Morocco and in the Mediterranean (in Marrakech and Agadir, summertime is all year round); a deterioration in the environment (quality of coastal water contingent on the treatment of wastewater).

- rebalancing the accommodation structure by giving preference to classic hotel lodging faced with the increase in residential lodging;
- targeting the backcountry around the town of Chefchaouen. In fact, the Chefchaouen area offers considerable potential just a few miles from the coast. Its advantages include mountainous landscapes, gorges suitable for canyoning, caves that can be visited by speleologists, etc. Native inhabitants have understood the demand for rural tourism and the need for exploration and mountain-based activities, with a high degree of involvement by local companies (rambling and exploration) backed up by external actors (international NGOs, decentralised cooperation projects): young mountain guides, local development associations, restaurant and accommodation professionals. Representing authenticity, Chefchaouen remains more of a "spontaneous tourist destination". Consequently, there are only a handful of official hotel operators there, and they cater to less than 10% of the demand that is otherwise oriented towards the town. Nevertheless, consideration must be given to the inhabitants of the region's villages where lifestyles are still rooted in tradition, as well as to the economic benefits for these inhabitants, given that excursions are organised from Chefchaouen. Lastly, the Chefchaouen region was the first in Morocco to receive the "Pays d'Accueil Touristique" (tourist-receiving region) certification: it is a constantly evolving destination.

Proposals:

- Counter "all residential" (source of tax?) and "all seaside" trends via political measures;
- Professionalise "authentic tourism" in the Chefchaouen area;
- Raise environmental awareness of tourists on the one hand, and of hotel operators and their staff on the other hand;
- Develop territorial marketing strategies to space out the tourist season;
- Facilitate/encourage "local supply" for accommodations (by organising and structuring local markets, short channels);
- Integrate waste collection in the support given to the creation of micro-businesses;
- Protect the last remaining nature reserves.

Tipasa (Algeria) by Samir Grimes

Matruh, Al Alamain, Siwa Oasis (Egypte), by Adel Rady

Cabras and Castelsardo (Sardinia, Italy), by Alessio Satta

In terms of the impacts of tourism on the population, Alessio Satta explains how those Sardinian towns that do not pay heed to tourism are continuing to lose their inhabitants. Conversely, destinations that cater to tourists are seeing their populations rise. However, young people continue to leave the island in search of jobs on the continent since "low-density" authentic tourism simply does not create sufficient long-lasting employment. As a result, Sardinian destinations tend to attract older generations in retirement: principal and secondary residence.

Sardinia's destinations have not been affected by the recent economic crisis since they represent proximity destinations on which European tourists fall back.

Furthermore, Alessio Satta recalls that in Cabras, the area's natural heritage has been promoted (marine protected area), while in Castelsardo, the cultural and historic heritage represent the key points of interest. Castelsardo is not subject to the same peaks in the number of tourists as Cabras because seasonal variations are cushioned by cultural events in the spring and autumn. Each destination is also distinguished by its respective type of accommodation structure: hotels in Castelsardo, other forms of accommodation in Cabras (farmhouse inns, B&B, etc.).

Finally, Alessio Satta believes that the local authorities of Cabras and Castelsardo have confirmed their ability to make their territory attractive for tourism without harming the environment; by creating marine protected areas, local authorities have demonstrated that environmental preservation can be a lucrative pull factor.

Rovinj (Croatia), by Zoran Klaric

Rovinj is an established Croatian destination predominantly oriented towards international tourism, with a diverse accommodation offering in which hotels represent a mere 30% of the tourist-receiving capacity, well behind camping (43%).

Like the Sardinian destinations, the economic crisis has had a positive effect on this destination⁹ that has managed to revive itself since the end of the last Balkan war: for Europeans, it is a proximity destination that can be easily reached by car, in particular from countries around the Adriatic Sea.

Rovinj is a destination where local authorities are very strict in terms of environmental preservation and protection. Both land-use planning and the indirect effects of the civil war in the 1990s have helped to limit pressure on the coastal areas in terms of land ownership and property.

According to Zoran Klaric, tourism is now one of the few economic activities in which Croatia is competitive, however the benefits for local companies remain scant. While tourism undoubtedly helps counter unemployment, 54% of jobs are seasonal.

⁹ In Croatia, the process for "restarting the machine" has been a long one considering that it has taken up until now to reach the pre-war level of person-nights.



Tourism Experts meeting “Profiles of Sustainability - Mediterranean Destinations”

Tentative agenda

Wednesday 15 June 2011

09:00-9:15 Welcome to participants

9:15-9:30 **Opening of the meeting**
Henri-Luc Thibault, Director of Bleu Plan
Objectives of the meeting
Julien Le Tellier

9:30-13:00 **Session 1: Presentation of the case studies by the experts.**
Results – Proposals of measures – Messages

9:30-11:00 **International Tourism Destinations**

- Jerba (Tunisia), by Jean Mohamed Mehdi Chapoutot (20 minutes)
- Torremolinos (Spain), by Antonio J. Rodriguez Morillo and Cristina Tanase on behalf of Enrique Navarro Jurado (20 minutes)
- Alanya (Turkey), by Çevat Tosun (20 minutes)
- Discussion (30 minutes)

11:00-11:30 **Coffee break**

11:30-13:00 **National Tourism Destinations**

- Tétouan Coastal Area (Morocco), by Mohamed Berriane (20 minutes)
- Tipaza (Algeria), by Samir Grimès (20 minutes)
- El Alamain and Marsa Matrouh (Egypt), by Adel Rady (20 minutes)
- Discussion (30 minutes)

13:00-14:10 **Lunch in Villa Valmer**

14:10-15:30 **Destinations with character : enhancement of natural and cultural heritage**

- Siwa Oasis (Egypt), by Adel Rady (10 minutes)
- Cabras and Castelsardo (Sardinia, Italy), by Alessio Satta (20 minutes)
- Rovinj (Croatia), by Zoran Klàric (20 minutes)
- Discussion (30 minutes)

15:30-17:30 **Session 2: Presentation and debate on the main results and conclusions of the “Synthesis of Profiles of Sustainability” report**

15:30-16:30 Presentation of the report, by Ioannis Spilanis
16:30-17:30 Discussion to further the messages carried by Blue Plan

20:00 **Dinner**

Thursday 16 June 2011 (morning)

9:30-13:00 **Session 3: Presentation and debate on the “Regional Framework for the promotion of the Mediterranean” report / provisional version**

9:30-10:30 Presentation of the report, by Ioannis Spilanis
10:30-12:00 Discussion to further the messages carried by Blue Plan
12h00-13h00 General discussion – End of the meeting

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