

# **CO-EVOLVE**

Promoting the co-evolution of human activities and natural systems  
for the development of sustainable coastal and maritime tourism

## **Deliverable 4.2.2**

### **Report on the training course**

#### **Activity 4.2**

Preparing the Pilot actions implementations

**WP4**

**PAP/RAC**



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## TRAINING COURSE REPORT

### Context of the training course

1. Co-Evolve is a project that brings together partners determined to develop sustainable tourism development plans for identified pilot areas. While the actions for each of the pilot sites are very different from one another, the partners have a common goal: to advance towards a sustainable tourism in accordance with the ICZM Protocol and MSP principles in a participatory approach. This goal has to be pursued in a common approach in order to better plan and manage tourism offer in the Mediterranean basin, allowing maximizing the possibilities of each destination while respecting its carrying capacities. This approach will be used as well in the south Mediterranean countries when transferring the results in the framework of the work package (WP) 5. The objective of the training courses is to get project partners, in particular those implementing pilot actions at local level, acquainted with the ICZM Protocol, strategic planning process, sustainability indicators, MSP principles and participatory approaches with the aim to have a common understanding and harmonized approach when preparing sustainable tourism plans for pilot areas. This will allow local tourism actors and stakeholders to get a common basis for a successful planning, leading to integrated decisions in sustainable tourism, helping them to make more informed and integrated decisions for the governance and management of tourism in the Mediterranean.

2. The one day training course of Co-Evolve partners on planning for improving the coastal and marine sustainability of tourist areas has been organized in Bologna, Italy (in the premises of the Region Emilia Romagna) on the 7<sup>th</sup> of March 2018. The meeting gathered 25 participants, 15 of them being representatives of all the pilot area partners (REMTH, Emilia Romagna region, Delta PO park Veneto, Valencia Port, Department of Herault, RERA and Dunea), 8 of them representatives of partner institutions (ISMAR, IUAV, UTH, CPMR) and 2 of them from research offices. The full list of participants is attached in Annex 1 from this report.

### Opening of the training course

3. The training course was opened on the 7<sup>th</sup> of March at 9:00 by Mr Montanari and Mr Prem. Mr Montanari started by welcoming the participants in the name of the region of Emilia Romagna, which is the leader of the WP 4 of Co-Evolve project. Mr Prem took then the floor

to present the agenda of the meeting (attached in Annex 2 of this report), and to remind them that this training course had been mainly designed for the pilot area partners.

### **Session 1: ICZM Protocol - its main requirements and relation to MSP – by Marko Prem**

4. M. Prem (PAP/RAC) started with presenting the Barcelona Convention and two of the most important issues Mediterranean coastal zones are facing during the last decades, namely littoralization and unsustainable tourism. He then presented the MAP system with its 7 Protocols, which are tools to improve the state of the Mediterranean marine and coastal environment. He paid a particular attention to the ICZM Protocol, which is the main legislative instrument for the implementation of ICZM in the Mediterranean region. M. Prem continued by explaining in details ICZM approach, and specially its geographical coverage. He also explained that ICZM was the proper tool to address land sea interactions, and that it was completed on the sea side with another instrument: the MSP. He finished his presentation with some concrete examples of how ICZM has been implemented in the past in different countries of the Mediterranean and put a particular emphasis on the CAMP projects. He stressed the crucial importance of participatory approaches and involvement of stakeholders throughout of the planning process, by showing some concrete examples from the completed projects in the Mediterranean (the complete presentation is available in Annex 3 of this report).

5. The question of how CAMP experiences were capitalized, and how the experience gained was shared among the different countries of the Mediterranean basin was asked by one of the participants. It was explained that it was thanks to the experience gained from these projects which started in the 90's that it had been possible to develop the ICZM approach, and that the Protocol was also one of the results of these cooperation. CAMPs have evolved today and often have a cross-border or even sub-regional dimension. In the future, they will also have a component of MSP. Also, the PAP/RAC currently works on an ICZM platform for the networking of CAMPs and of people involved in different ICZM projects in order to have a community of projects but also of people. This platform will be of precious help for the future ICZM projects.

### **Session 2: Introduction to strategic planning. Tourism-driven strategic planning at local level**

6. M. Magni (IUAV) held the second presentation on strategic planning at the local level for sustainable tourism. He clearly explained which were the steps of the methodology



elaborated in the framework of Co-Evolve based on the ICZM Process provided by PAP/RAC. The 6 steps are:

- Planning set up – identify the needs for a tourism driven strategic planning; define the working team as well as the boundaries of the zone of the project; identify stakeholders and elaborate a work plan.
- Building knowledge framework – make an analysis of threats and enabling factors as well as of the existing planning tools and policies; apply the sustainability toolkit.
- Defining the vision, the goals and the objectives – design a common and integrated vision: identify the main planning goals and objectives; link these objectives with ICZM and sustainable tourism goals.
- Designing the strategy – formulate the strategy/ plans/programs.
- Implementing the plan – prioritize the measures, implement the actions.
- Reviewing the plan – monitor the status of the plan and the variation of sustainability.

He particularly insisted on the importance of stakeholder participation in the process. He also warned the audience on the critical issues which could slow down the process. He then presented some examples of which were the priorities identified by the pilot areas in the framework of Co-Evolve (the complete presentation is available in Annex 3 of this report).

7. The importance of participation was acknowledged by the audience. It was mentioned that the way work was done was completely different when there was a participatory process than when there was not. But it was also emphasized that it is a demanding process which requires a lot of energy. Nevertheless, the results of the coastal plan and strategies depend on this. Trust and ownership of the results are dependant from this process. However, it is important to choose carefully when to involve the stakeholders in order to avoid consultation fatigue, which arises when people are over solicited for participation purposes.

8. The question of the level relevant to planning was raised. A region sometimes has a large number of municipalities and it is hard to choose in between them. The need to elaborate a strategy for pilot selection was then underlined. The proper level of planning must be defined case by case based on the political and institutional context, but also on the expressed wills at the local level (bottom-up approach). Successful examples of planning for sustainable tourism can be found in each of the scales. One important element is that strategies/plans at different level must be coherent, i.e. strategies/plans at the local scale will have to be coherent with the ones at the regional scale, which themselves have to be coherent with the ones at the national scale.

### **Session 3: Sustainability indicators: tourism sustainability at local scale through sustainability index**

9. The third presentation was made by Mrs Koutsopoulou (UTH), who started by introducing the concept and objectives of having indicators to measure tourism sustainability. She then presented the results of the study realized in the framework of the project, which contains 3 levels of indicators: the core indicators (based on ETIS indicators), the destination indicators and pilot area specific indicators. After explaining which were the key steps in evaluating tourism sustainability at destination level, she finished by presenting the interest of indicators for a sound planning (the complete presentation is available in Annex 3 of this report).

10. The problem of data accessibility was raised by some participants: pilot areas have problems to inform Co-Evolve indicators as they are different from the indicators which are currently used in their area. Also, the data pilot area have are sometimes collected on a different spatial scale (regional, national). It was clarified that if pilot areas don't have the precise indicator, they can use proxy indicators (approximately similar). It is also possible to add new ones when needed. The problem of the scale is frequently encountered. What is actually needed is to have a first glimpse of the state of the art in order to guide the future efforts for measuring. It is important that the pilot areas clearly state which indicators are the most relevant for them, even though they may have no data at the moment. Data for these indicators will be measured in the future.

11. It was explained that all the indicators from the toolkit did not have to be informed. Ideally, each pilot zone should inform all the core indicators but we are not in an ideal situation. So each pilot area can choose four or five key indicators in order to guide them in the project. The goal of Co-Evolve is not just to produce a plan but to improve sustainability in the pilot area in a long term perspective. It is also possible to make a qualitative estimation of the indicator based on stakeholder consultation if there are no data available in order to check whether there is a need or no to include this indicator.

12. It was clarified that the final selection of indicators would happen at the end of the planning process, as the chosen indicators will have to be correlated with the actions proposed for the area. The original list of indicators produced in the WP3 is just indicative.

### **Session 4: Marine spatial planning (MSP)**

13. Mrs Markovic (PAP/RAC) then had a presentation on MSP, which principles are, together with ICZM Protocol, at the core of Co-Evolve project. A lot of participants being not very familiar with the process, she began by explaining the concept and the specificities of MSP compared to land use planning. She then briefly presented the MSP process, as well as the

obligations MSP Directive imposes to the European countries until 2021. Afterword, she showed maps with examples of MSP in different European countries as well as transboundary projects, which are of major importance in this context. She continued by explaining the links on between MSP and the ecosystem approach, as well as the complementarity in between MSP, water framework directive and marine strategic framework directive. She finished by presenting in detail the land sea interactions, which are of crucial importance to understand the connection between MSP and ICZM. Mrs Markovic explained that MSP does not deal only with the sea, but also on its links with the land and how the land interacts with the sea, and how the sea influences the land. MSP can also extend in scope on the land if some issues identified have their origin there. She finished by pointing out how much integration was essential for this process (the complete presentation is available in Annex 3 of this report).

14. The discussion which followed Mrs Markovic presentation focused on the place of transitional waters in MSP. It was clarified that the Directive on MSP does not put any obligation to plan transitional waters in case they are already part of some land-use plan. Nevertheless, it is not prohibited to include them in MSP. The most important for EU is to have a plan for most of the territorial sea and also to take into consideration the EEZ. Then countries have to decide themselves if they will have a plan for land and sea integrated into a single one. But in general, transitional waters should be taken into account when a marine spatial plan is designed.

15. It was recalled that when talking about MSP, 2 types of boundaries should be considered: the assessment boundaries, which can be very wide, and the management boundaries. So the plan may have small boundaries but take into account all the impacts coming from the other areas.

16. It was emphasizes that implementation of MSP is still in its initial stage in most of European countries. For this reason, EU provides funds so they can test different methodologies to prepare their spatial units to do the MSP. An overview of all MSP pilots besides France is available on the EU platform on MSP (<http://www.msp-platform.eu/>).

17. The importance of the governance setting was underlined, meaning there has to be a body responsible for implementing the plan. The MSP plans will be legally binding as the land use plans, but this body is important for law enforcement.

## **Session 5: Stakeholders involvement and participatory approaches**

18. The last presentation of the training course was held by Sabrina Franceschini and dealt with stakeholder's involvement and participatory approaches. Prior to the training course a

questionnaire was distributed to all participants/partners so to collect information of the current knowledge and gaps from them. The Questionnaire is attached as Annex 4. About twelve questionnaires were returned and helped to better structure this session. After explaining in details what was the goals of participatory approaches, she presented a six steps methodology which could be applied in the context of Co-Evolve project. The six steps are:

- Context analysis: its aims are to reach information about the social context for better design the process and involved the target;
- Stakeholder involvement and partnership building;
- Plan the activities;
- Set up the tools: based on the specificity of the process, one must decide how to articulate the steps online and offline, what tools and techniques to be used, the number of meetings, work methods, the time required and whether or not to use external or internal moderators / facilitators, if available;
- Plan implementation and monitoring, which searches to implement the action plan and to tackle the possible deviation; and
- Evaluation: to measure the real impact of the process in relation to the aims in the context, as well as in term of benchmarking in relation to other similar project (the complete presentation is available in Annex 3 of this report).

19. After the presentation, Mr Martinez took the floor in order to briefly present different some participatory techniques.

### **Session 6: Needs assessment for pilot areas**

19. Mr Martinez continued this last session by introducing more participatory techniques to the participants. Through simulations, i.e. FUTOUR's Digital Mosaic Session on "Needs assessment for the Pilot Areas", he demonstrated that in a short time, concrete results could be achieved in terms of stakeholder contributions through several tools that stimulate dialogue and interaction. He then helped Mr Prem and Mrs Evers to collect information on three main aspects: 1. What were the most useful inputs they got from the training course; 2. Which topics that were presented during this training workshop they would like to know in more details; and 3. What was missing and should be addressed next time.

1. Participants expressed their strong satisfaction with all the inputs they had been given during the training. They particularly mentioned they could now better understand the indicators, as well as the way to use them in the project. They also pointed out they now better understood the MSP concept, as well as its relation with ICZM. Besides, they showed

their interest for the participatory method which were presented. Finally, they stated that they now had a clearer idea about how to use the planning process.

2. Topics which could be more detailed in the next training workshop.

For the next training session, participants expressed a strong will to learn more about participatory techniques (how to be persuasive, how to deal with aggressive stakeholders, etc.). Besides, they asked for more clarification on the use of indicators in Co-Evolve, and on the way they are going to be used in the future. Also, they expressed their will to learn more on the MSP, even though this approach is to be applied in only one pilot area.

3. What was missing, was not addressed this time and what would you like to know more at the second training?

Participants pointed out they would like the second workshop to be more interactive with less presentations. They emphasized their interest to learn more about financial opportunities and fund raising for the implementation of the plans. Besides, they are willing to learn more on the tricks which are making the difference in between a good and a bad action plan with examples of good practices. Finally, participants stated they would like to understand the cost-benefit analysis, learn how to define an action plan, get examples of governance schemes to implement action plans, learn how to involve decision makers, discuss concrete examples on the ground through visits to pilot areas, and work on discussion of draft plans prepared by partners as well as exchange good practises. They also expressed their desire to exchange between partners on what is working and where are difficulties in concrete situations in the pilot areas. These suggestions will be prioritised and another round of consultation with pilot areas as well as with other project partners will be done prior to structuring the next training course.

20. After thanking all the participants for their rich contributions, Mr Montanari and Mr Prem closed the training course at 16:30.

## ANNEX 1: LISTE OF PARTICIPANTS

|      | Partner   | Name                     |
|------|---|--------------------------|
| PP1  | Region of East Macedonia and Thrace   | Maria Hamitidou          |
| PP1  | Region of East Macedonia and Thrace   | Erato Malisianou         |
| PP2  | CPMR Intermediterranean Commission  | Emmanuel Maniscalco      |
| PP2  | Agence Trajectoires   | Serge Gomes da Silva     |
| PP3  | University of Thessaly  | Tonia Koutsopoulou       |
| PP3  | Futour  | Paolo Martinez           |
| PP4  | Emilia-Romagna Region   | Roberto Montanari        |
| PP4  | Emilia-Romagna Region   | Christian Marasmi        |
| PP4  | Emilia-Romagna Region   | Sabrina Franceschini     |
| PP4  | Priority actions programme/Regional activity center                                   | Marko Prem               |
| PP4  | Priority actions programme/Regional activity center                                   | Veronique Evers          |
| PP4  | Priority actions programme/Regional activity center                                   | Marina Marković          |
| PP5  | Fundacion Valenciaport  | Andrea Muñoz             |
| PP6  | Instituto Delta   | Maria Letizia Vitelletti |
| PP6  | Instituto Delta   | Graziano Caramori        |
| PP7  | Dubrovnik Neretva Regional Development Agency   | Ivana Prce               |
| PP7  | Institute for spatial planning of the Dubrovnik Neretva County                        | Barbara Savin            |
| PP7  | Institute for spatial planning of the Dubrovnik Neretva County                        | Stjepko Kovačić          |
| PP8  | Department of Hérault   | Philippe Carbonnel       |
| PP8  | Hérault Tourisme  | Caroline Leclant         |
| PP9  | Public institution RERA SD for coordination and development of Split Dalmacija County | Srećko Radić             |
| PP9  | Public institution RERA SD for coordination and development of Split Dalmacija County | Mili Novak               |
| PP10 | University of Venice  | Filippo Magni            |
| PP10 | University of Venice  | Federica Appiotti        |
| PP11 | CNR ISMAR   | Andrea Barbanti          |



## ANNEX 2: AGENDA OF THE TRAINING COURSE

### CO-EVOLVE

Promoting the co-evolution of human activities and natural systems for the development of sustainable coastal and maritime tourism

### 1<sup>st</sup> Training Course Draft AGENDA

**Organizer:** PAP/RAC and EMILIA-ROMAGNA REGION  
**Venue:** Emilia-Romagna Region, viale della fiera 8, Bologna  
**Room B-C**  
**March 7<sup>th</sup>, 2018**

|                      |  |
|----------------------|--|
| 09:00 - 09:15        | Welcome and presentation of the course programme (PAP/RAC: Marko Prem)   |
| <b>09:15 – 9:45</b>  | <b>Introduction to ICZM</b>  |
|                      | PAP/RAC: Marko Prem<br>ICZM Protocol, its main requirements and relation to MSP  |
| <b>9:45 – 10:45</b>  | <b>Strategic planning for tourism development</b>  |
|                      | IUAV: Filippo Magni, Federica Appiotti<br>Introduction to strategic planning. Tourism-driven strategic planning at local level   |
| <b>10:45 – 11:30</b> | <b>Sustainability indicators</b>   |
|                      | UTH: Tonia Koutsopoulou<br>Sustainability indicators for sustainable tourism planning at local level   |
| <b>11:30 – 12:00</b> | <i>Coffee Break</i>  |
| <b>12:00 – 13:00</b> | <b>Marine Spatial Planning and Land-Sea Interactions (LSI)</b>   |
|                      | PAP/RAC: Marina Markovic<br>Introduction to MSP, its main characteristics and steps when preparing a MSP plan. Importance of LSI   |
| <b>13:00 – 14:00</b> | <i>Lunch Break</i>   |
| <b>14:00 – 15:00</b> | <b>Stakeholders involvement and participatory approaches</b>   |
|                      | RER and Futour: Sabrina Franceschini, Paolo Martinez, Ana Maria Solis<br>Need for and ways of stakeholders' involvement. Methodology for the participative process. Techniques/tools for effective participation |
| <b>15:00 – 15:30</b> | <i>Coffee Break</i>  |
| <b>15:30 – 16:30</b> | <b>Needs assessment for Pilot areas</b>  |
|                      | PAP/RAC: Marko Prem, Veronique Evers, Futour<br>Discussion about the very needs of the Pilot areas in order to tailor the 2 <sup>nd</sup> training course, by using participatory techniques                     |
| <b>16:30</b>         | <b>End of the course</b>   |

## ANNEX 3: POWER POINT PRESENTATIONS OF THE TRAINING COURSE

### I. Presentation 1: ICZM Protocol and its main requirements and relation to MSP

Interreg  
Mediterranean

Project co-financed by the European  
Regional Development Fund

CO-EVOLVE

**ICZM Protocol -  
its main requirements and relation to  
MSP**

Marko Prem

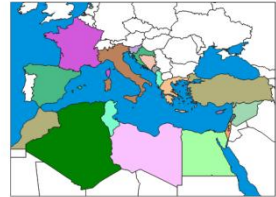
1st CO-EVOLVE Training course  
Bologna, 7th March 2018

Interreg  
Mediterranean

CO-EVOLVE

**Barcelona Convention**

- Mediterranean Action Plan (MAP) 1975
- "Convention for the Protection of the Marine Environment and the Coastal Region of the Mediterranean" 1976/1995
- 21 Countries + EU
- Complex, diverse

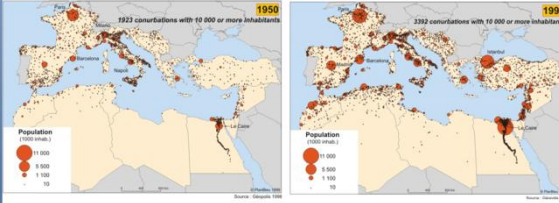


Interreg  
Mediterranean

CO-EVOLVE

**Coastal urbanisation!**

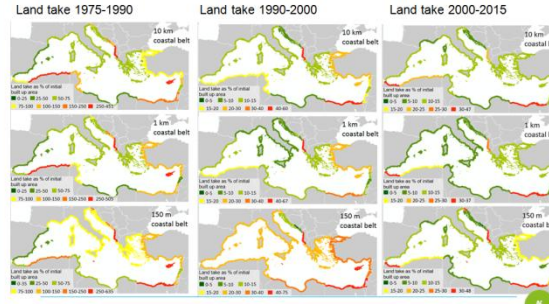
- rapid expansion, "litoralisation"



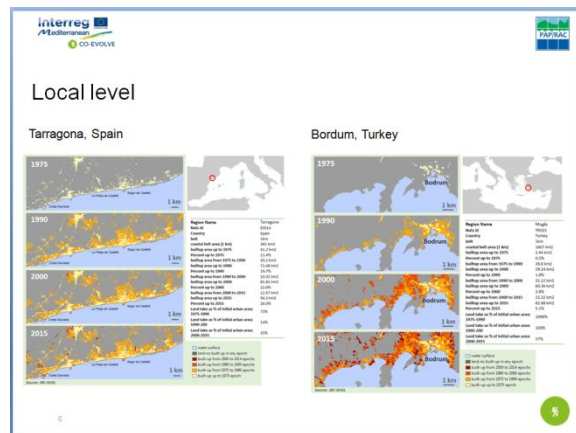
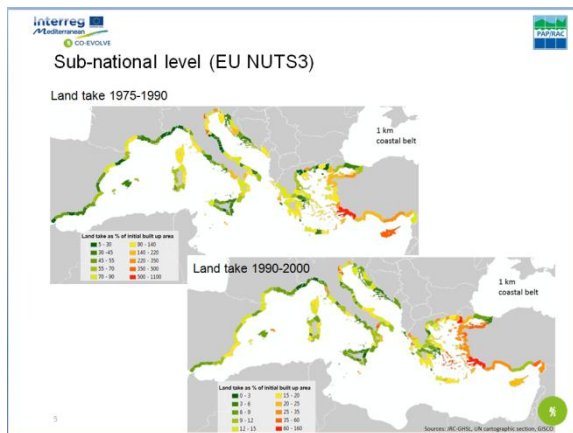
Interreg  
Mediterranean

CO-EVOLVE

**Evolution of built-up area in coastal zones of the Mediterranean 1975-2015**







**Tourism!**

- 637 mio tourists in 2025, 273 mio more than in 2000
- A Sustainable Future for the Mediterranean  
BP/RAC E&D Outlook

A Sustainable Future for the  
MEDITERRANEAN

The Blue Plan's  
Environment & Development Outlook

Evolution of ICZM 1975 - 2018

Evolution of the Mediterranean Integrated Coastal Zone Management (ICZM) Protocol

MedPartnership

one the way forward

MAP Legal base

- Seven specific legal frameworks:
  - Dumping Protocol
  - Emergency P
  - LBS P
  - SPA and Biodiversity P
  - Offshore P
  - Hazardous Wastes P
  - ICZM Protocol

PROTOCOL ON INTEGRATED COASTAL ZONE MANAGEMENT IN THE MEDITERRANEAN

PROTOCOL RELATIF A LA GESTION INTEGREE DES ZONES COTIERES DE LA MEDITERRANEE

PROTOCOLO RELATIVO A LA GESTION INTEGRADA DE LAS ZONAS COSTERAS DEL MEDITERRANEO

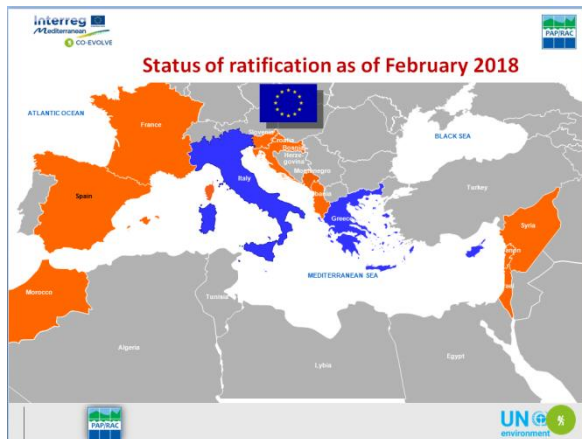
– ICZM Protocol signed (Madrid, 21 Jan 2008)

– To date: 15 signatories, 9 ratifications

CONFERENCE OF THE PLENIPOTENTIARIES ON THE ICZM PROTOCOL

20 - 21 Jan 2008

✓ Innovative ✓ Future oriented and proactive ✓ Comprehensive ✓ Integrated ✓ Binding



interreg  
Mediterranean  
CO-EVOLVE

Structure of the Protocol

**Part I:**  
**General Provisions**

- Article 1: General Obligations
- Article 2: **Definitions**  
(e.g. coastal zone, ICZM)
- Article 3: **Geographical Coverage**
- Article 4: **Preservation of Rights**
- Article 5: **Objectives** of ICZM
- Article 6: General **Principles** of ICZM
- Article 7: **Co-ordination**  
(vertical, horizontal)

ICZM PROTOCOL  
in the  
Mediterranean

interreg  
Mediterranean  
CO-EVOLVE

Structure of the Protocol

**Part I:**  
**General Provisions**

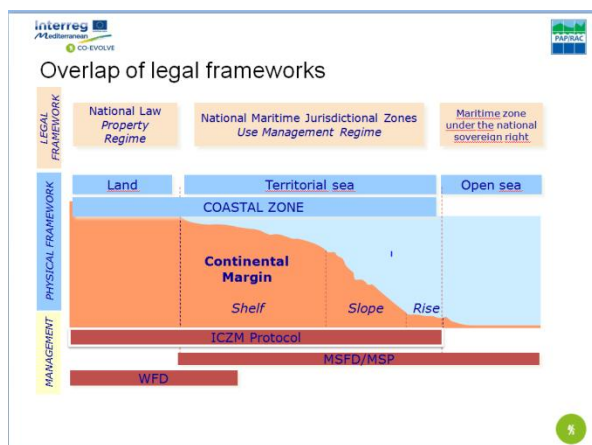
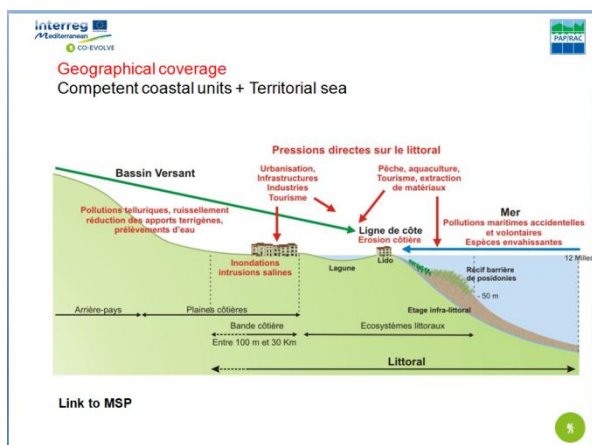
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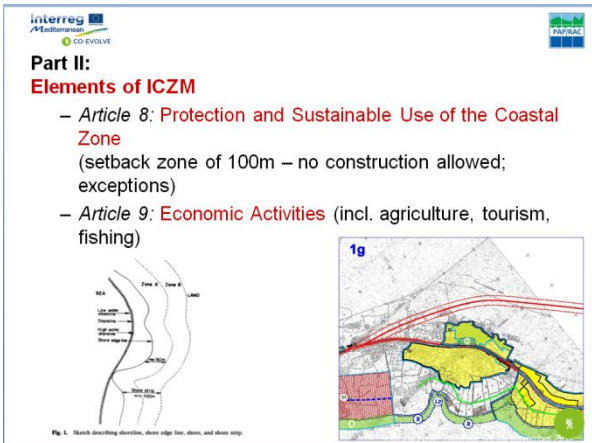
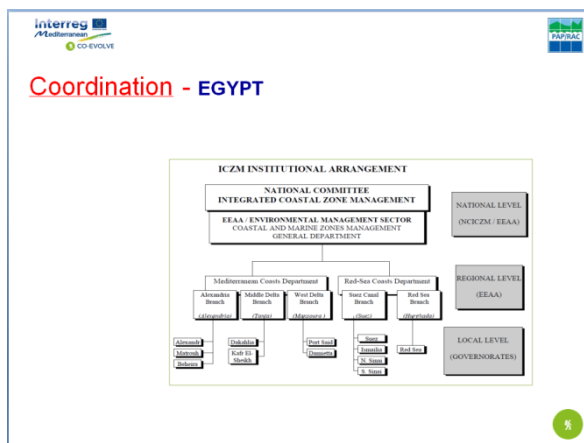
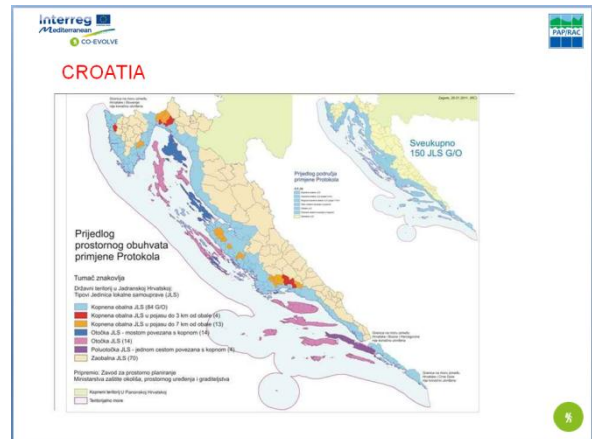
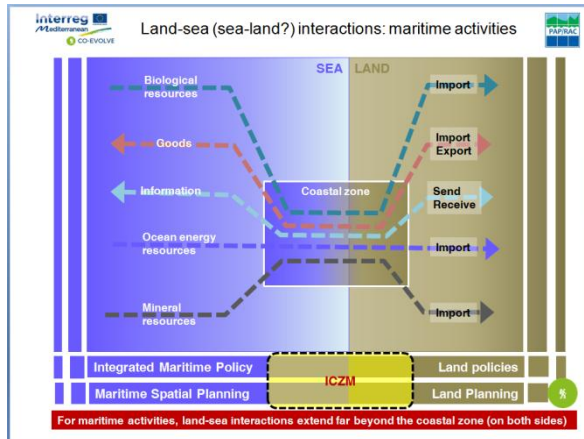
ICZM PROTOCOL  
in the  
Mediterranean

interreg  
Mediterranean  
CO-EVOLVE

**Definition of ICZM**

**“Integrated coastal zone management”**  
means a dynamic process for the sustainable management and use of coastal zones, taking into account at the same time the fragility of coastal ecosystems and landscapes, the diversity of activities and uses, their interactions, the maritime orientation of certain activities and uses and their impact on both the marine and land parts





Economic activities; tourism (Art. 9)

- In conformity with the objectives and principles Parties shall:
  - accord specific attention to economic activities that require immediate proximity to the sea;
  - ensure that the various economic activities minimize the use of natural resources and take into account the needs of future generations;
  - ensure respect for integrated water resources management and environmentally sound waste management;
  - ensure that the coastal and maritime economy is adapted to the fragile nature of coastal zones and that resources of the sea are protected from pollution;
  - define indicators of the development of economic activities to ensure sustainable use of coastal zones and reduce pressures that exceed their carrying capacity;
  - promote codes of good practice among public authorities, economic actors and non-governmental organizations.
- Tourism, sporting and recreational activities.
  - to encourage sustainable coastal tourism that preserves coastal ecosystems, natural resources, cultural heritage and landscapes;
  - to promote specific forms of coastal tourism, including cultural, rural and ecotourism, while respecting the traditions of local populations;
  - to regulate or, where necessary, prohibit the practice of various sporting and recreational activities, including recreational fishing and shellfish extraction

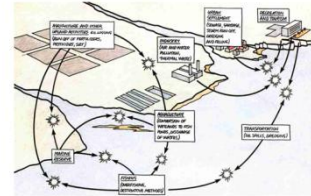


## Part II: Elements of ICZM

- Article 10: Specific Coastal Ecosystems
- Article 11: Coastal Landscapes
- Article 12: Islands
- Article 13: Cultural Heritage
- Article 14: Participation
- Article 15: Awareness-raising, Training, Education and Research

## Participation

- Territorial communities and public entities
- Economic operators
- NGOs
- Social actors
- Public concerned



## Awareness raising activities



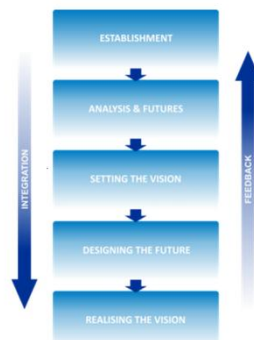
- High level conferences (Syria, Algeria) and panels (Turkey)
- Workshops (Morocco, Algeria, Egypt, Jordan, The Palestinian Authority, Syria, Italy and Cyprus)
- Over 60 national partners
- Open doors at 5 marine protected areas (Sardinia, Italy)
- Concerts (Egypt, Lebanon, Syria and Italy)
- Sailing regatta (Sardinia, Italy)
- Kayak excursions (Turkey and in lake Nador, Morocco)
- Clean up campaigns (Morocco, Algeria, Egypt, Syria and Greece)
- Photo, poster and other exhibitions
- Drawing contexts (Morocco, Algeria)
- Painting competitions (Montenegro)
- Marathon (Egypt)

## Part III: Instruments for ICZM

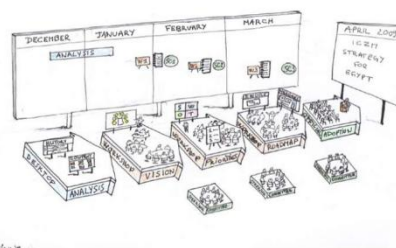
- Article 16: Monitoring and Observation Mechanisms and Networks
- Article 17: Mediterranean Strategy for ICZM
- Article 18: National Coastal Strategies, Plans and Programmes
- Article 19: Environmental Assessment
- Article 20: Land Policy
- Article 21: Economic, Financial and Fiscal Instruments

## Methodologies

### ICZM Process




## Guidelines for National ICZM Strategies National ICZM Strategies for Egypt, Algeria, Montenegro, Croatia



**Demonstration projects**  
Application of ICZM approach, tools and techniques in demo areas

- Buna/Bojana transboundary coastal management plan (Albania/Montenegro)
- ICZM plan in Reghaia (Algeria)




STRATEGIC PARTNERSHIP FOR THE MEDITERRANEAN SEA LARGE MARINE ECOSYSTEM  
MedPartnership




**CAMP Levante de Almeria, SPAIN**

- SE of Spain
- Marine: 71,000 ha
- Terrestrial: 148,122 ha
- 8 Municipalities
- Semi-arid 200mm/year: High vulnerability to climate change
- Important cultural and natural heritage;
- A high % under some form of official protection;
- Rapid changes in the land uses: Tourism and agriculture
- Complex normative and management frameworks



**CAMP Levante de Almeria**  
Institutional coordination body

**COMMISSION**

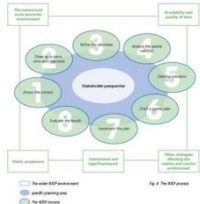


Representatives from authorities involved in the management of CAMP area.

| Authorities                                      | Nº        |
|--|-----------|
| Municipalities                                   | 8         |
| Municipalities Association of Levante de Almeria | 1         |
| Provincial Council of Almeria                    | 1         |
| Provincial Delegations from Regional Government  | 7         |
| General Government Public Administration         | 4         |
| <b>Total</b>                                     | <b>21</b> |

Littoral 2012 Costende 27-29 November 2011

- Dialog
- Consensus building
- Trust
- Ownership
- Success



**Part IV:**  
**Risks Affecting the Coastal Zone**

- Article 22: **Natural Hazards**
  - natural disasters, climate change; vulnerability and hazard assessments
- Article 23: **Coastal Erosion**
- Article 24: **Response to Natural Disasters**



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**Part V:  
International Co-operation**


- Article 25: Training and Research
- Article 26: Scientific and Technical Assistance
- Article 27: Exchange of Information and Activities of Common Interest
- Article 28: Transboundary Co-operation
- Article 29: Transboundary Environmental Assessment



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**Part VI:  
Institutional provisions**

- Article 30: Focal Points
- Article 31: Reports
- Article 32: Institutional Coordination
- Article 33: Meetings of the Parties




**Thank you**

UNEP - Mediterranean Action Plan

**Priority Actions Programme  
Regional Activity Centre**  
Kraj Sv. Ivana 11  
21000 Split, CROATIA

[www.pap-thecoastcentre.org](http://www.pap-thecoastcentre.org)



## II. Introduction to strategic planning. Tourism-driven strategic planning at local level

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### Introduction to strategic planning. Tourism-driven strategic planning at local level

Federica Appiotti, Filippo Magni, Francesco Musco  
IUAV University of Venice  
Department of Design and Planning in a Complex Environment

CO-EVOLVE  
4<sup>th</sup> Steering Committee Meeting  
BOLOGNA, March 7<sup>th</sup>, 2018

Make sure you stay organised with a quality diary

### Agenda Plan



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First and simple definition

The act or process of making a plan to achieve or do something

- Source: Merriam-Webster's Learner's Dictionary -

Planning if it is anything, is a way of changing things, a mode of transformation

- Source: Byrne, 2003 -

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**Spatial Focus**

**1. Planning gives geographical expression to the economic, social, cultural and ecological policies of society.** It is at same time a scientific discipline, an administrative technique and a policy developed as an interdisciplinary and comprehensive approach directed towards a balanced regional development and the physical organization of space according to an overall strategy.

- Source: Council of Europe, 2003 -

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**STARTING POINT 1**  
**STEPS OF TOURISM-DRIVEN STRATEGIC GUIDELINES**

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**STARTING POINT 2**  
**STAKEHOLDERS INVOLVEMENT PROCESS**

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**STEP 1**  
**STEPS OF TOURISM-DRIVEN STRATEGIC GUIDELINES**

**LEVELS OF ACTION**

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**The importance of Local Level**

«Local governments play a strategic role in tackling sustainability for their responsibilities in the plans and regulations that may affect sustainable development»

*Climate Roadmap 2007, Covenant of Mayor 2009, Global Cities Covenant on Climate – the Mexico City Pact 2011, Bonn Declaration of Mayors*

**The pillars of the local level**

- Local governments set the overall direction for their municipalities through **long-term planning**. Examples include council plans, financial plans, municipal strategic statements and other strategic plans. Setting the vision, and then ensuring that it is achieved, is one of the most important roles of local government.
- Local authorities have undertaken for nearly two decades in the field of **sustainable development** trying to translate the global strategies in local practices through local Agenda 21 processes (with clear implications for climate change mitigation).
- The local level has ability to put **pressure on national governments** through the development of local projects, demonstrating on a small scale the costs and benefits of reducing emissions of greenhouse

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- Identification of needs for a tourism-driven strategic planning (**PLANNING SCOPE**)
- Definition of the working team (**COORDINATION**)
- Definition of the territorial scope (**BOUNDARIES**)
- Identification of stakeholders (**INCLUSION and VALIDATION**)
- Construction of the work plan and definition of "milestones" (**ROADMAP for EFFICIENCY**)



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**TOURISM DRIVEN STRATEGIC PLANNING**

- Identification of needs for a tourism-driven strategic planning (**PLANNING SCOPE**)

Why I would like to design a tourism-driven strategic plan for my area?

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**TOURISM DRIVEN STRATEGIC PLANNING**

**Plan to Plan.** No, this is not a typographical error!

The first step of planning process must be a **plan for planning**.

**Key factors** associated with this step include:

- the allocation of time,
- human resources,
- Money and energy to the effort.

This step identifies the key **socio-economic and land use issues and problems facing the community**. This step may also involve definition of the size of an area to be studied, determination of the scope of the study and the establishment of a committee structure to oversee the planning process.

Why I would like to design a tourism-driven strategic plan for my area?

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**TOURISM DRIVEN STRATEGIC PLANNING**

- Definition of the working team (**COORDINATION**)

- scientists,
- GIS experts
- communications change management specialists,
- economists,
- regulators,
- business and industry leaders,
- citizen groups
- ...

Wouldn't the solutions to touristic sustainable planning challenges look very different?

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**TOURISM DRIVEN STRATEGIC PLANNING**

- Identification of stakeholders (**INCLUSION and VALIDATION**)

- Local authority/local governance
- Local interest group
- Local people/citizens
- Business Community
- Community and community organisations
- ...

Which stakeholders I must involve in the planning process? Why they are useful and in which phases?

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**TOURISM DRIVEN STRATEGIC PLANNING**

- Construction of the work plan and definition of "milestones" (**ROADMAP for EFFICIENCY**)

**Simple Timeline**

How much time do I need (considering my resources) to reach my goals?

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**TOURISM DRIVEN STRATEGIC PLANNING**

**Critical issues in the planning processes**

In your opinion, thanks to what local governments are interested in sustainable tourism development?

For local administrators: virtuous and far-sighted  
For active involvement of upper bodies  
At the possibility of raising funds  
The possibility of stimulating the local economy  
Other

**Main barriers to action**

- Lack of information for decision making (Hauser and Jadin 2012; Kareiva 2008; Ken 2011)
- Lack of economic resources (Brugger and Crimmins 2011; Needham et al. 2012; Simmonds 2011)
- Fragmentation of decision-making (Horton et al. 2012; Leboeuf et al. 2012; Winkler et al. 2012)
- regulatory and institutional constraints (Adger et al. 2009; Garfin et al. 2012; McKeelley 2012)
- Lack of leadership (Moser and Ekstrom 2012; Smith et al. 2009)
- The uneven risk perception (Caban et al. 2007; Leiserowitz 2006; Yarnes et al. 2006)



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ENERGY SOURCES AND SAVINGS



SHERPA

## Critical issues in the planning processes

**In your opinion, thanks to what local governments are interested in sustainable tourism development?**

For local administrators virtuous and far-sighted

For active involvement of upper bodies

At the possibility of raising funds

The possibility of stimulating the local economy

Other \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### Main barriers to action


- **Lack of information for decision making**  
(Hauser and Jadin 2012; Kareiva 2008; Kerr 2011)
- **Lack of economic resources**  
(Brugger and Cirminea 2011; Needham et al. 2012; Simmonds 2011)
- **Fragmentation of decision-making**  
(Horton et al. 2012; Lebow et al. 2012; Winkler et al. 2012)
- **regulatory and institutional constraints**  
(Adger et al. 2009; Garfin et al. 2012; McNealey 2012)
- **Lack of leadership**  
(Moser and Ekstrom 2012; Smith et al. 2009)
- **The uneven risk perception**  
(Kahan et al. 2007; Leiserowitz 2006; Verweij et al. 2006)



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## 1° STAKEHOLDER INVOLVEMENT

**PLANNING SET UP**

Identification of main stakeholder

Presentation of the planning process to the main stakeholders of the area previously identified by the working team (kick-off meeting)

- RESULTS & OUTPUTs: 1° Report of WP4



The diagram illustrates the steps of tourism-driven strategic guidelines. It is divided into two main parts: a circular process for 'TOURISM DRIVEN STRATEGIC PLANNING' and a flowchart for 'STEP 1'.

**TOURISM DRIVEN STRATEGIC PLANNING:** This circular process consists of eight steps, with 'Step 01' highlighted. The steps are:

- Step 01: Understanding the context
- Step 02: Identifying the vision and mission
- Step 03: Identifying the stakeholders
- Step 04: Identifying the opportunities and threats
- Step 05: Identifying the strengths and weaknesses
- Step 06: Identifying the resources
- Step 07: Identifying the risks
- Step 08: Identifying the challenges

**STEP 1:** This flowchart shows the progression from 'DATA COLLECTION' to 'KNOWLEDGE FRAMEWORK'. The steps are:

- DATA COLLECTION
- THREATS
- ENABLING FACTORS
- SUSTAINABILITY TOOLKIT
- PLANS ANALYSIS
- ANALYSIS
- PRIORITIES
- SUSTAINABILITY INDEX
- POLITICAL AND PLANNING TOOLKIT
- KNOWLEDGE FRAMEWORK

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**CO-EVOLVE**

## STARTING POINT 2

### STEPS OF TOURISM-DRIVEN STRATEGIC GUIDELINES



**Scope: Analysis of the area in a coherent and integrated way**

**Collect and provide**

**Data**


- Geographical & socio-economical data related to the pilot area
- Area sustainability status (*sustainability toolkit*)
- Threats and enabling factors;
- Projections and future scenarios

**Information**

- Existing policies and plans
- Other information useful to support the planning process

**What types of data/information are available and which ones should I produce / search for??**

[illegible]



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KARERE  
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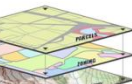
## DATA ANALYSIS


Maps, graphs, charts, **etc help to design** long term & short term objectives and goals, **identifying the priorities issues and the vulnerable areas.**

**GIS DATA LAYERS**

Many different types of data can be integrated into a GIS and represented as a map layer. Examples can include: streets, parcels, zoning, flood zones, client locations, competition, shopping centres, office parks, demographics, etc.

(These layers are drawn on top of one another, undistorted spatial trends and relationships often emerge. This allows us to gain insight about relevant characteristics of a location.







**London properties at risk of flooding**

Properties at risk by borough, all types of flooding

Demographics and Culture

London 31,657

Southwest 100,065

Westminster 52,651

East London 15,000

West London 25,000

Central London 30,000

North London 40,000

South London 45,000

East London 50,000

West London 55,000

Central London 60,000

North London 65,000

South London 70,000

East London 75,000

West London 80,000

Central London 85,000

North London 90,000

South London 95,000

East London 100,000

West London 105,000

Central London 110,000

North London 115,000

South London 120,000

East London 125,000

West London 130,000

Central London 135,000

North London 140,000

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East London 150,000

West London 155,000

Central London 160,000

North London 165,000

South London 170,000

East London 175,000

West London 180,000

Central London 185,000

North London 190,000

South London 195,000

East London 200,000

West London 205,000

Central London 210,000

North London 215,000

South London 220,000

East London 225,000

West London 230,000

Central London 235,000

North London 240,000

South London 245,000

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West London 255,000

Central London 260,000

North London 265,000

South London 270,000

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East London 300,000

West London 305,000

Central London 310,000

North London 315,000

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South London 345,000

East London 350,000

West London 355,000

Central London 360,000

North London 365,000

South London 370,000

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Central London 385,000

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South London 395,000

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Central London 410,000

North London 415,000

South London 420,000

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West London 430,000

Central London 435,000

North London 440,000

South London 445,000

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West London 455,000

Central London 460,000

North London 465,000

South London 470,000

East London 475,000

West London 480,000

Central London 485,000

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East London 500,000

West London 505,000

Central London 510,000

North London 515,000

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North London 565,000

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North London 590,000

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East London 600,000

West London 605,000

Central London 610,000

North London 615,000

South London 620,000

East London 625,000

West London 630,000

Central London 635,000

North London 640,000

South London 645,000

East London 650,000

West London 655,000

Central London 660,000

North London 665,000

South London 670,000

East London 675,000

West London 680,000

Central London 685,000

North London 690,000

South London 695,000

East London 700,000

West London 705,000

Central London 710,000

North London 715,000

South London 720,000

East London 725,000

West London 730,000

Central London 735,000

North London 740,000

South London 745,000

East London 750,000

West London 755,000

Central London 760,000

North London 765,000

South London 770,000

East London 775,000

West London 780,000

Central London 785,000

North London 790,000

South London 795,000

East London 800,000

West London 805,000

Central London 810,000

North London 815,000

South London 820,000

East London 825,000

West London 830,000

Central London 835,000

North London 840,000

South London 845,000

East London 850,000

West London 855,000

Central London 860,000

North London 865,000

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Central London 885,000

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South London 895,000

East London 900,000

West London 905,000

Central London 910,000

North London 915,000

South London 920,000

East London 925,000

West London 930,000

Central London 935,000

North London 940,000

South London 945,000

East London 950,000

West London 955,000

Central London 960,000

North London 965,000

South London 970,000

East London 975,000

West London 980,000

Central London 985,000

North London 990,000

South London 995,000

East London 1,000,000

West London 1,005,000

Central London 1,010,000

North London 1,015,000

South London 1,020,000

East London 1,025,000

West London 1,030,000

Central London 1,035,000

North London 1,040,000

South London 1,045,000

East London 1,050,000

West London 1,055,000

Central London 1,060,000

North London 1,065,000

South London 1,070,000

East London 1,075,000

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### DATA ANALYSIS

Maps, graphs, charts, etc **help to design** long term & short term objectives and goals, identifying the priorities issues and the vulnerable areas.

**GIS DATA LAYERS**  
Many different types of data can be integrated into a GIS and represented as a map layer. Examples can include: streets, parcels, zoning, flood zones, client locations, competition, shopping centers, office parks, demographics, etc. When these layers are drawn on top of one another, undetected spatial trends and relationships often emerge. This allows us to gain insight about relevant characteristics of a location.

**EXAMPLE: Strategic action in the Alexandroupoli Pilot Area**

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### 2.

**STEP 1**  
DATA COLLECTION

Analysis of collected data in order to obtain a **knowledge framework**

useful to

Construct **planning priorities** and subsequent **goals and objectives**

The analysis is strongly focused on the planning main goal?

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### 2.

**STEP 1**  
DATA COLLECTION

**BUILDING KNOWLEDGE FRAMEWORK**  
Analysis of the current area current status  
Presentation of the results to the technical stakeholders - mid phase review  
Deliverable: Knowledge framework updated after the stakeholders review

Which are the main **sectoral** issues/problems/dynamics/priorities of the study area?

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### 3.

**STEP 1**  
DATA COLLECTION

The third task's purpose is to organized the results obtained from the previous phases to facilitate the subsequent steps execution

**Final summary of existing conditions of the area**

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**TOURISM DRIVEN STRATEGIC PLANNING**

**The main governance challenges**

- HORIZONTAL INTEGRATION** of data and information in **all areas** of public policy  
(Burton et al. 2006; European Commission, 2007; FAO, 2007; Valsecchi et al., 2007)
- VERTICAL INTEGRATION** of levels of government  
(Betz, 2004; Adger et al. 2006; Schmitz, 2007; Klemm et al., 2007)
- INTEGRATION OF KNOWLEDGE** useful for decision-making  
(Barnett, 2001; Ford, 2008; Tsi, 2006)
- STAKEHOLDER ENGAGEMENT** that are involved by sustainable development  
(Helsen et al. 2007; Dazord, 2008; Fournis, 1990; OECD, 2008; Valsecchi et al., 2007)

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### STEP 3

**STEPS OF TOURISM-DRIVEN STRATEGIC GUIDELINES**

**TOURISM DRIVEN STRATEGIC PLANNING**

**Focus:**  
**Set the main planning direction**

- Addressing the strategic issues emerged;
- Ensuring coherence and compliance with ICZM and ST principles and goals



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**STEP 2**

**VISION BUILDING**

**1. Design of a common and integrated vision for the area**

What is the desired or intended future of the coastal area in terms of strategic and sustainable tourism development?

A vision should be:

- both rational and inventive;
- clear and compelling;
- aligned with the community's aspiration and existing policies;
- a vivid picture of a desired future.

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**1. Design of a common and integrated vision for the area**

Once community problems and opportunities have been identified, many planning commissions prepare a "vision statement," capturing in words what the community intends or wishes to become at some point in the future

- to regulate growth,
- to nullify the bad effects of past growth,
- to improve the transportation facilities,
- to optimize the resources utilization,
- to balance population and economic activities,
- to promote social integration among different categories,
- to promote a convenient comfortable, beautiful and healthy environment.

The vision statement will give **direction to the development of plan goals and objectives**, the next step in the process. Preparation of a vision statement also offers another opportunity for involving the public.

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**EXAMPLE 1: VISION OF ALEXADROUPOLI**

The Alexandroupoli coastal area, as the Region of Eastern Macedonia and Thrace (REMTH), is considered an example of urbanized littoral subjected to erosion located in strategic position (at the center of land and sea routes connecting Greece with Turkey), for tourism sector development. Despite this, the competition in terms of tourism offer is very high and strong.

Based on this, the area will work to increase and enhance the tourist offer in a sustainable and effective way. In the medium term, the area aims to address an improvement and diversification of the accessibility capacity connected with an enlargement of urban area and a conservation/protection of the peculiar natural features. The area will work to become a liveable and sustainable touristic area that will improve its economic growth through an enhancement of interconnections between the social and natural/agricultural systems. The increase of accessibility infrastructures, and the plan of city development will complementary act to guarantee a conservation of the eastern side protected area (Evros River Delta) and to generate a promotion of new form of tourism activities supported also by a diversification of users. Furthermore, the area will try to achieve a better liveability and protection of the coastal area from erosion and climate change emerging problems in order to increase the economic sector related to tourism activities. The area will undertake a transformation toward the development of competitive and sustainable touristic structures and the consequent generation of economic growth that will act to reduce the lack of attractiveness of the area.

Furthermore, from a medium to a long term, the area is investing in attracting cruise and yachting tourism vision through the expansion and the privatization of the port.

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**2. Identification of main planning goals and objectives**

Setting objectives involves a continuous process of research and decision-making

**MED-SCALE STRATEGY**

- Strengthening innovation capacities
  - Dissemination of innovative technologies and know-how
  - Strengthening cooperation between economic development stakeholders and public authorities
- Environmental protection and promotion of a sustainable territorial development
  - Protection and enhancement of natural resources and cultural heritage
  - Promotion of renewable energies and energy efficiency improvement
  - Prevention of maritime risks and strengthening of maritime safety
  - Prevention of and fight against natural risks
- Improvement of mobility and territorial accessibility
  - Improvement of maritime accessibility and of transit capacities through multimodality and intermodality
  - Support to the use of information technologies for a better accessibility and territorial cooperation
- Promotion of a polycentric and integrated development of the MED space
  - Coordination of development policies and improvement of territorial governance
  - Strengthening of identity and enhancement of cultural resources for a better integration of the Med

Strategic Axes of development identified by the Interreg MED programme and the strategic sub-objectives specified for each axis

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**STEP 2**

**VISION BUILDING**

**OBJECTIVE 1**

**ICZM High Level Objectives**

|                             | A healthy and productive economy | A healthy and productive environment | Public health and safety | Social cohesion |
|-----------------------------|----------------------------------|--------------------------------------|--------------------------|-----------------|
| Energy and water management | +                                | +                                    | +                        | +               |
| Transportation              | +                                | +                                    | +                        | +               |
| Urban development           | +                                | +                                    | +                        | +               |
| Industrial development      | +                                | +                                    | +                        | +               |
| Maritime development        | +                                | +                                    | +                        | +               |
| Coastal development         | +                                | +                                    | +                        | +               |
| Maritime protection         | +                                | +                                    | +                        | +               |
| Coastal protection          | +                                | +                                    | +                        | +               |
| Maritime culture            | +                                | +                                    | +                        | +               |
| Coastal culture             | +                                | +                                    | +                        | +               |

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**STEP 2**

**VISION BUILDING**

**Example: Keramoti Pilot Area**

**OBJECTIVE 1**

**Development of Eco tourism activities, within the protected area**

**ICZM High Level Objectives**

|                             | A healthy and productive economy | A healthy and productive environment | Public health and safety | Social cohesion |
|-----------------------------|----------------------------------|--------------------------------------|--------------------------|-----------------|
| Energy and water management | +                                | +                                    | +                        | +               |
| Transportation              | +                                | +                                    | +                        | +               |
| Urban development           | +                                | +                                    | +                        | +               |
| Industrial development      | +                                | +                                    | +                        | +               |
| Maritime development        | +                                | +                                    | +                        | +               |
| Coastal development         | +                                | +                                    | +                        | +               |
| Maritime protection         | +                                | +                                    | +                        | +               |
| Coastal protection          | +                                | +                                    | +                        | +               |
| Maritime culture            | +                                | +                                    | +                        | +               |
| Coastal culture             | +                                | +                                    | +                        | +               |



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**STEP 5**  
STEPS OF TOURISM-DRIVEN STRATEGIC GUIDELINES

**EXAMPLE 2. STRATEGY FOR SUSTAINABLE TOURISM DEVELOPMENT OF THE CARPATHIANS**



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**STEP 5**  
STEPS OF TOURISM-DRIVEN STRATEGIC GUIDELINES

**EXAMPLE 2.**

3.2 Joint Activities

**Objective 1: ESTABLISH SUPPORTIVE CONDITIONS FOR THE SUSTAINABLE TOURISM PRODUCTS AND SERVICES, INCLUDING DEVELOPMENT OF A MARKETING SCHEME FOR THE PROMOTION OF THE CARPATHIANS AS A UNIQUE SUSTAINABLE TOURISM DESTINATION**

| Activities  | Proposed start |
|---|----------------|
| Create a Carpathian <del>tourism</del> <b>tourism</b> <del>strategy</del> <b>strategy</b> for all those service providers who joined and were labelled under the Carpathian product line  | Year 2         |
| Initiate and possibly create a certification and/or labelling system for sustainable tourism for the Carpathian Brand, supported by a Carpathian-wide marketing strategy  | Year 3         |
| Develop a Carpathian-wide quality standard system for local products and local services (e.g. "local food", "local accommodation", "local experience - how to enjoy forests", "Code of Conduct for tourists in the Carpathians")  | Year 4         |
| Develop common principles and guidelines on tourism infrastructure and undertake activities to make them sustainable  | Year 4         |
| Establish a four operators' cooperation platform  | Year 5         |
| Design, where applicable, a common system of marking trails throughout the Carpathians  | Year 5         |
| Develop, maintain and keep up to date a common online Carpathian platform on sustainable tourism, including products and services database, trans-boundary products and mapping, as well as good practices, with continuously updated information, and including the preparation of a Carpathian brand logo | Year 1         |
| Develop, maintain and keep up to date an online platform promoting labelled products, linking with the websites of NGOs   | Year 6         |

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**STEP 6**  
STEPS OF TOURISM-DRIVEN STRATEGIC GUIDELINES

**TOURISM-DRIVEN STRATEGIC PLANNING**



- Provide **constant feedback** on the extent to which the actions are achieving their goals;
- Identify potential problems at an early stage and propose possible solutions;
- Monitor the **accessibility** of the actions implemented to all sectors of the target population;
- Monitor the efficiency with which the various components of the plan are being implemented and suggest improvements;
- Evaluate the extent to which the plan is able to achieve its general objectives.

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**Telephone: +39 3381741308**  
**Web site of the partner: <http://www.planningclimatechange.org/wp/en/>**

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### III. Sustainability Indicators: Tourism Sustainability at local scale through sustainability Index

**Sustainability Indicators:**  
*Tourism Sustainability at local scale through Sustainability Index*

**Task Leader: University of Thessaly**  
**Harry Coccossis, Tonia Koutsopoulou**

**CO-EVOLVE 1<sup>st</sup> Training Course**  
Bologna, 7 March 2018

**I. Concept and Objectives**

The economic and social performance of tourism activities need to be correlated and co-evaluated with the environmental performance and impacts on tourism destinations in a long term perspective ensuring the conditions of sustainable development for future generations.

conceptual model for assessing the level of sustainable development of tourism in Mediterranean coastal destinations

assess sustainability at destination level

identify data needs and gaps

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**II. Tourism Sustainability Toolkit – Analysis of the model**

**1 Core Indicators**  
40 indicators from ETIS to serve as the basis for development of the level and trends of sustainable development

**2 Destination Indicators**  
2<sup>nd</sup> set to address the specific issues of coastal areas according to the characteristics and particularities of the predominant type of tourism activity in each type of destination

**3 Pilot Area Specific**  
3<sup>rd</sup> set to address area-specific critical issues with specific linkages to the main threats, enabling factors and governance issues

**Three tier system**

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**III. Key issues towards measuring sustainability at destination level**

How to define the destination

How to adapt indicators to each destination

How to deal with data gaps

General Methodological Framework

How to develop a common methodological framework

How to manage different types of data

Measuring sustainability at destination level

**CO-EVOLVE 1<sup>st</sup> Training Course - Bologna, 7 March 2018**

**IV. Methodological process – Key steps for adapting the indicators**

**1 Sustainability Toolkit**  
Extended and flexible Tourism Sustainability Toolkit

**2 Priority Indicators List**  
Selection of the most common critical issues and specificities encountered in Mediterranean coastal destinations

**3 Prioritization of Indicators & Data Availability**  
a) Limit the range of possible indicators and b) Highlight the most important ones

**4 Customization of Pilot Area Indicators**  
a) Final measurement/assessment b) Estimations on satisfaction levels and trends evaluation

**5 Pilot Area Customized Toolkits**  
Basic guide for data collection, evaluation and monitoring tourism development

**CO-EVOLVE 1<sup>st</sup> Training Course - Bologna, 7 March 2018**

**Sustainability Toolkit** → **Priority Indicators List**

| Ind. Ref. | Core Indicators   | Destination Indicators: D. Beach/Marine tourism |   |
|-----------|---|---|---|
| CA1.1     | % of tourism enterprises/establishments in the destination using a voluntary certification/labeling for environmental quality/sustainability and/or Corporate Social Responsibility | DA1.1   | Number of beachfronts/establishments in coastal zone* |
| CA1.2     | Number of tourist nights per month  | DA1.2   | Number of beachfronts/establishments in coastal zone* |
| CA1.3     | Average length of stay  | DA1.3   | Number of beachfronts/establishments in coastal zone* |
| CA1.4     | Number of tourists/visitors   | DA1.4   | Number of beachfronts/establishments in coastal zone* |
| CA1.5     | Average carbon footprint  | DA1.5   | Number of beachfronts/establishments in coastal zone* |
| CA1.6     | Waste production per day  | DA1.6   | Number of beachfronts/establishments in coastal zone* |
| CA1.7     | Water consumption per day   | DA1.7   | Number of beachfronts/establishments in coastal zone* |
| CA1.8     | Water use (total volume in liters or m <sup>3</sup> consumed and lost per tourist per day)  | DA1.8   | Number of beachfronts/establishments in coastal zone* |
| CA1.9     | % of tourism enterprises  | DA1.9   | Number of beachfronts/establishments in coastal zone* |
| CA1.10    | % of tourism enterprises  | DA1.10  | Number of beachfronts/establishments in coastal zone* |
| CA1.11    | % of tourism enterprises  | DA1.11  | Number of beachfronts/establishments in coastal zone* |
| CA1.12    | % of tourism enterprises  | DA1.12  | Number of beachfronts/establishments in coastal zone* |
| CA1.13    | % of tourism enterprises  | DA1.13  | Number of beachfronts/establishments in coastal zone* |
| CA1.14    | % of tourism enterprises  | DA1.14  | Number of beachfronts/establishments in coastal zone* |
| CA1.15    | % of tourism enterprises  | DA1.15  | Number of beachfronts/establishments in coastal zone* |
| CA1.16    | % of tourism enterprises  | DA1.16  | Number of beachfronts/establishments in coastal zone* |
| CA1.17    | % of tourism enterprises  | DA1.17  | Number of beachfronts/establishments in coastal zone* |
| CA1.18    | % of tourism enterprises  | DA1.18  | Number of beachfronts/establishments in coastal zone* |
| CA1.19    | % of tourism enterprises  | DA1.19  | Number of beachfronts/establishments in coastal zone* |
| CA1.20    | % of tourism enterprises  | DA1.20  | Number of beachfronts/establishments in coastal zone* |

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2 Priority Indicators List

3 Prioritization of Indicators & Data Availability

Customization of the Draft Priority Indicators List  
Introduction of additional indicators to further highlight  
thresholds and enabling factors in each FA

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3 Prioritization of Indicators & Data Availability

4 Customization of Pilot Area Indicators

Final measurement/assessment of the selected indicators and relative explanatory information

two levels of queries

Estimations on satisfaction/levels and trends evaluation

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4 Prioritization of Indicators & Data Availability

5 Pilot Area Customized Toolkits

Customized sustainability indicators toolkit for Comacchio

Available at destination level

Available at different spatial scale

Partially available: Estimations based on proxy and qualitative data at destination level

Partially available: Estimations based on proxy and qualitative data at different spatial scale

No available data

Recording and monitoring key assets for ecotourism tourism flows and spatial concentration implementation of tourism and environmental plans

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V. Key steps in evaluating tourism sustainability at destination level

1 Identification of limitations in data accessibility

Assessment of indicators by measuring stakeholders' perception

acquire estimations

promote active participation of stakeholders in planning

2 Definition of thresholds

Scientific & political dimension

efforts towards the integration of stakeholders' and experts' perception

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VI. Use of sustainability indicators in planning

Provide hints for improving existing or shift towards alternative tourism models

Highlight existing data gaps & provides guidelines towards relative measurements

Measure and quantify stakeholders' perceptions

Define thresholds through public consultation processes

Develop probability scenarios to adjust future planning actions and policies

Monitor changes in sustainability in the future

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CO-EVOLVE 3<sup>rd</sup> Steering Committee meeting - Valencia, 16-17 November 2017

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## IV. Marine spatial planning

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**MSP**



1st CO-EVOLVE training course  
Bologna, 7th March 2018

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© <https://seekingalpha.com/article/4040511-offshore-drilling-mediterranean-sea-lebanon-offers-5-blocks-oil-gas-exploration>

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Legend: Incompatible conditionally compatible compatible

|                              | 1  | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 |
|------------------------------|----|---|---|---|---|---|---|---|---|----|----|----|----|----|----|----|----|
| Offshore wind farms          | 1  |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |
| Marine protected areas       | 2  |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |
| Fisheries                    | 3  |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |
| The sea as a public good     | 4  |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |
| Cables                       | 5  |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |
| Tourism                      | 6  |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |
| Shipping and shipping routes | 7  |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |
| Harbours and ports           | 8  |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |
| Agriculture-on-land          | 9  |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |
| Sand and gravel extraction   | 10 |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |
| Oil and gas exploration      | 11 |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |
| Dumping of dredging material | 12 |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |
| Mariculture                  | 13 |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |
| Coastal service centres      | 14 |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |
| Nature conservation          | 15 |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |
| Coastal protection           | 16 |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |
| Military use                 | 17 |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |

Fig. 9. Estimates of spatial compatibility of different types of sea use (Gill et al. 2006)

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© <https://cbb-uk-west-2-act.org/1/temosak-theopathology.com/blog-nus.edu.sg/0102/2/6460/files/2054/05/Coastalpollution1-shreppor.jpg>

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People sunbathe on the beach in front of turbines, which form Britain's largest offshore wind farm about 2 miles off the Great Yarmouth coastline on July 15, 2006 in Norfolk, England. Ocean City's proposed offshore wind farm would be 12 miles off the coast. (Photo: Getty Images)  
<http://www.dailymail.co.uk/10013664/>

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## COASTAL (AND MARINE) AREA



ICZM Protocol

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## MARINE SPATIAL PLANNING

Marine spatial planning is a public process of analyzing and allocating the spatial and temporal distribution of human activities in marine areas to achieve ecological, economic, and social objectives that usually have been specified through a political process. Characteristics of marine spatial planning include ecosystem-based, area-based, integrated, adaptive, strategic and participatory.

Marine spatial planning is not an end in itself, but a practical way to create and establish a more rational use of marine space and the interactions among its uses, to balance demands for development with the need to protect the environment, and to deliver social and economic outcomes in an open and planned way.

IOC-UNESCO IT IS NOT SECTORAL PLAN – IT TAKES THEM INTO CONSIDERATIONS AND INTEGRATES INTO CROSS-SECTORAL COMPREHENSIVE PLAN

ZONING PLAN – THE MAP  
SET OF MANAGEMENT MEASURES/ACTIONS TO IMPLEMENT THE PLAN  
GOVERNANCE SETTING  
MONITORING AND EVALUATION

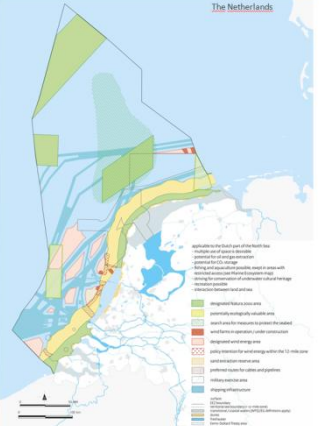
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## SPECIFICITY OF MSP



- 3d nature of the sea: bottom, column, surface with the space above
- stationary (like submarine cables) and temporary utilisation (aquaculture etc) → multipurpose utilisation
- dynamic and unpredictable nature of the sea
- no private ownership – concessions

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## MSP PROCESS



The Iterative MSP cycle (source: Ehler and Douvres, 2009)

Step 1 – Starting the process and getting organised

Step 2 – Assessing the context and defining a vision

Step 3 – Analyzing existing conditions (incl. issues)

Step 4 – Analysis of future conditions; development of scenarios

Step 5 – Design phase: elaborating the MSP Plan

Step 6 – Implementing, monitoring and evaluating the plan

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28.8.2014 L 257/315

Official Journal of the European Union

## DIRECTIVES

DIRECTIVE 2014/89/EU OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL  
of 23 July 2014  
establishing a framework for maritime spatial planning

THE EUROPEAN PARLIAMENT AND THE COUNCIL OF THE EUROPEAN UNION,

Having regard to the Treaty on the Functioning of the European Union, and in particular Articles 43(2), 100(2), 192(1), and 194(2) thereof,

Having regard to the proposal from the European Commission,

After transmission of the draft legislative act to the national parliaments,

Having regard to the opinion of the European Economic and Social Committee (1),

Having regard to the opinion of the Committee of the Regions (2),

Enter into force  
September  
2014

**IMPORTANT DATES**

2016: Deadline for transposition and designation of competent authorities

2021: Deadline for the establishment of maritime spatial plans

**PROGRESS BY NOW**

2016: Deadline for transposition and designation of competent authorities

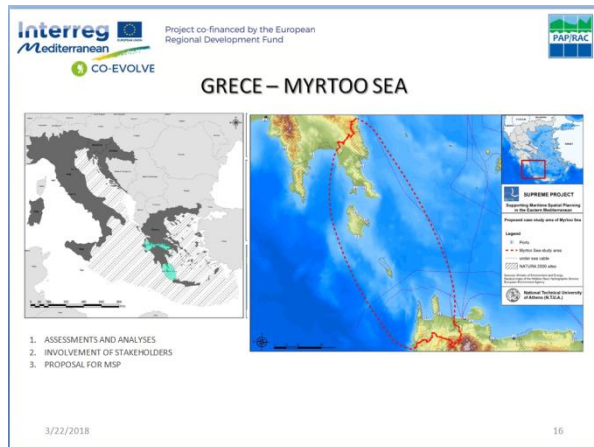
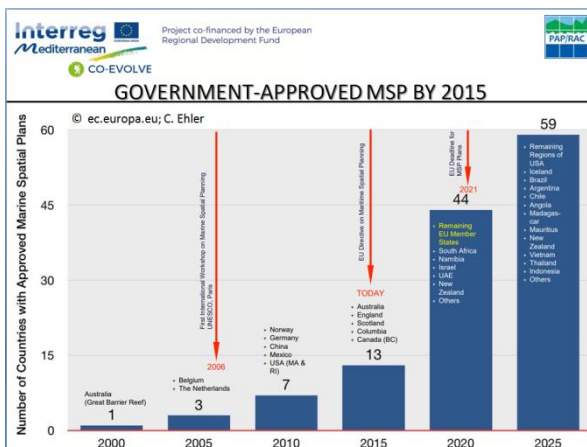
Croatia, Greece, France, Italy, Spain – transposed the Directive into national legislation

**Responsible authorities:**

- Ministry of Construction and Physical Planning (*Ministarstvo graditeljstva i prostornog uređenja*) with Croatian Institute for Spatial Development in Croatia;
- Ministry of Environment and Energy (*Υπουργείο Περιβάλλοντος και Ενέργειας*) in Greece;
- Ministry for Ecologic Transition (*Ministère de la transition écologique et solidaire*) in France;
- Ministry of Transport and Infrastructure (*Ministero delle Infrastrutture e dei Trasporti*) in Italy;
- Ministry of Agriculture, Food and Environment (*Ministerio de agricultura y pesca, alimentación y medio ambiente*) in Spain.

**In addition:**

- 4 Maritime and Terrestrial Prefectures and Interregional Directorates for the Sea (*Direction Interrégionale de la Mer – DIRM*) in France
- 11 coastal autonomous regions in Spain
- Italian coastal regions
- 7 county institutes for spatial planning in Croatia
- Other sector ministries





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**ITALY-MALTA**

**ASSESSMENTS – ecosystems; sea-uses and CEA**

**MSP PROPOSALS – simple and representative zoning (tests)**

**TRANSBOUNDARY COOPERATION – recommendations for improved transboundary co-operation for MSP**

3/22/2018

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**SPAIN - FRANCE**

**Gulf of Lions**

**ASSESSMENTS AND ANALYSES**  
Evaluate/Test Spanish and French CEA METHODS

**RECOMMENDATIONS on solving conflicts (marine uses; uses and environment)**

3/22/2018

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**FRANCE - VAR**

**ASSESSMENTS AND ANALYSES**  
Testing decision-making tools

**RECOMMENDATIONS for efficient articulation of Var SCOTs (maritime component) in the framework of the DSP definition**

3/22/2018

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**CROATIA**

**ASSESSMENTS AND ANALYSES**

1. Analysis of the present MSP status in the area
2. Analysis of the Dubrovnik-Neretva County Spatial Plan in force
3. Assessment of a transboundary cooperation between Croatia and Italy

**OBJECTIVES**

1. Inputs & requests from stakeholders
2. Defining objectives

**ASSESSMENT OF THE METHODOLOGY FOR DEVELOPING THE STATE PLAN FOR SPATIAL DEVELOPMENT AND THE CONTINENTAL SHELF SPATIAL PLAN**

3/22/2018

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**PROGRESS BY NOW**

<http://www.msp-platform.eu/>

**MSP Database**  
We invite you to search for MSP implementation experiences in the Mediterranean and the Adriatic-Ionian Sea. You can also explore the existing MSP pages. The MSP Database page of Interest in countries.

**Guiding paper published for Small Sea Space workshop**  
A guiding paper has been published for the upcoming workshop on MSP in Small Sea Spaces.

**MSP Platform**  
About Us  
Our team  
Roadmap  
Related to Question

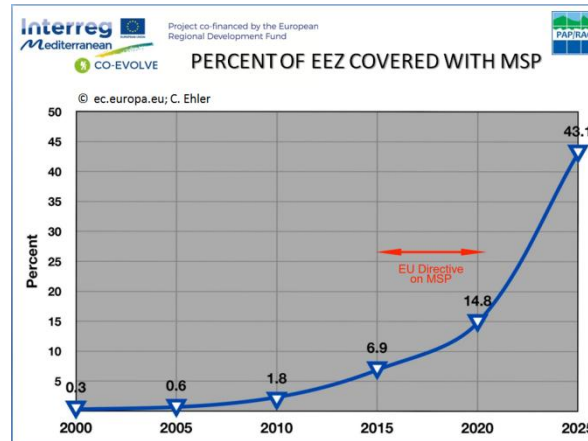
**MSP in Europe**  
The European Maritime Spatial Planning Platform provides a single interface to develop together objectives and responses from various spatial and non-spatial stakeholders in a multi-stakeholder, multi-institutional framework, as well as the knowledge and exchange forum for all involved in MSP throughout Europe.

**Upcoming Events**  
1st MSP Stakeholder Forum  
The Marine Management Organisation is

**Twitter**  
EU MSP Platform (@EU\_MSP\_Platform)  
Follow @EU\_MSP\_Platform on Twitter

**Open calls**  
New MSP Platform  
New MSP Platform  
New MSP Platform

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**INITIAL COMMENTS AND QUESTIONS**

- Examples of tourism related conflicts in marine areas?
- Examples of MSPs particularly relevant for tourism development?
- Involvement in MSP? How is/was public participation organised?

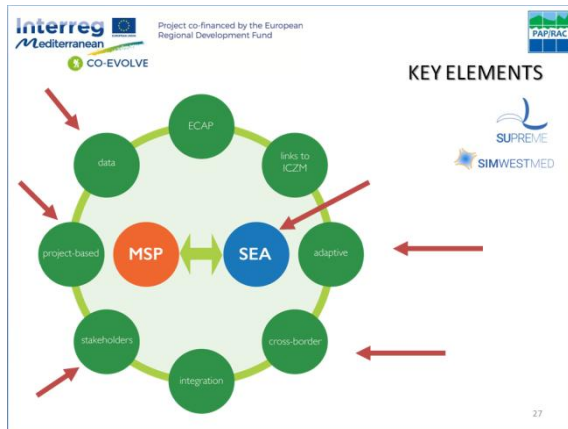
**MSP IN THE MEDITERRANEAN**

PROTOCOL ON INTEGRATED COASTAL ZONE MANAGEMENT IN THE MEDITERRANEAN  
COP 20 – Tirana, 2017  
COMMON REGIONAL FRAMEWORK FOR ICZM  
CONCEPTUAL FRAMEWORK FOR MSP

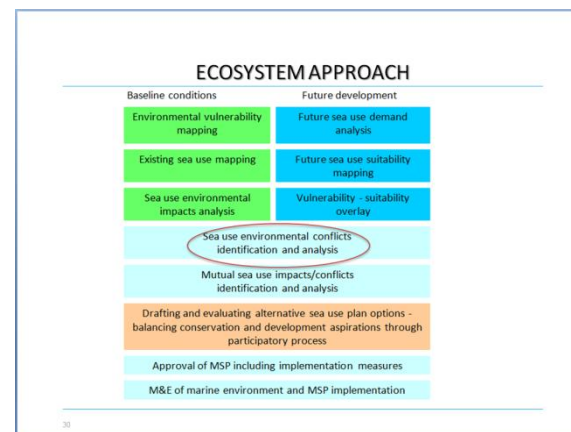
PROTOCOLE RELATIF À LA GESTION INTÉGRÉE DES ZONES CÔTIÈRES DE LA MEDITERRANÉE

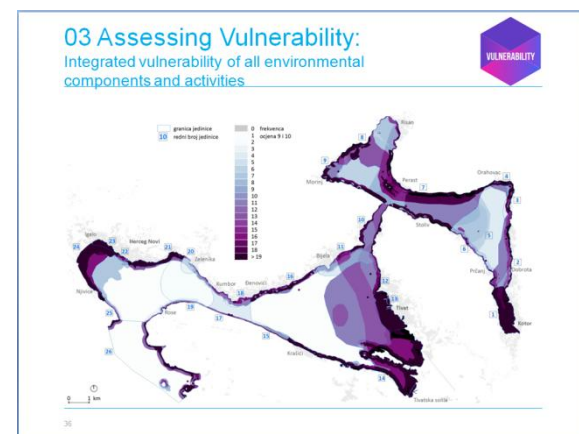
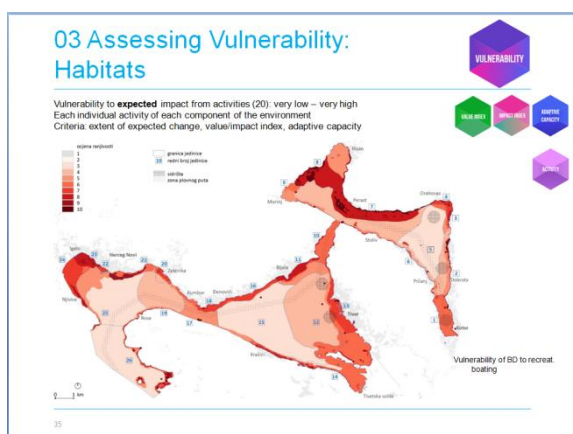
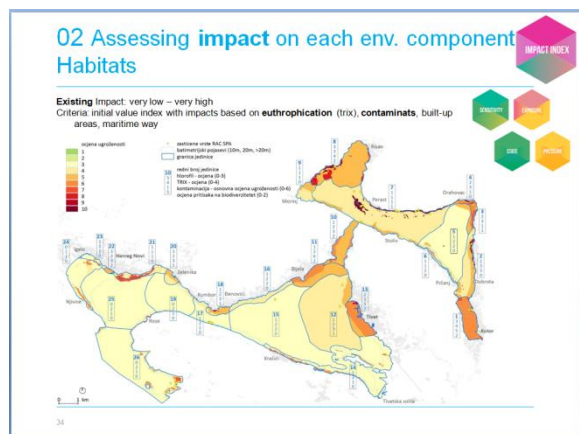
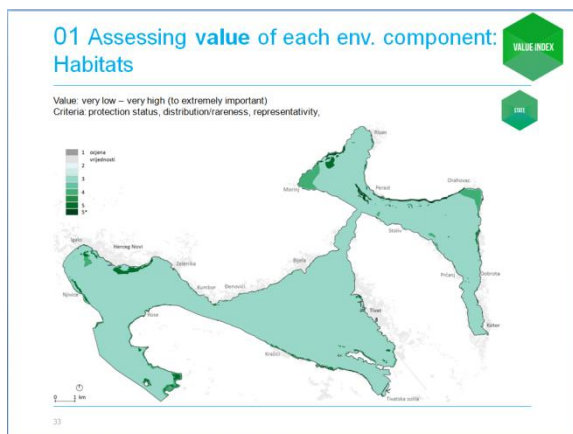
PROTOCOLO RELATIVO A LA GESTIÓN INTEGRADA DE LAS ZONAS COSTERAS DEL MEDITERRANEO

MSP as specific instrument/process for the implementation of ICZM in the marine part of the coastal zone

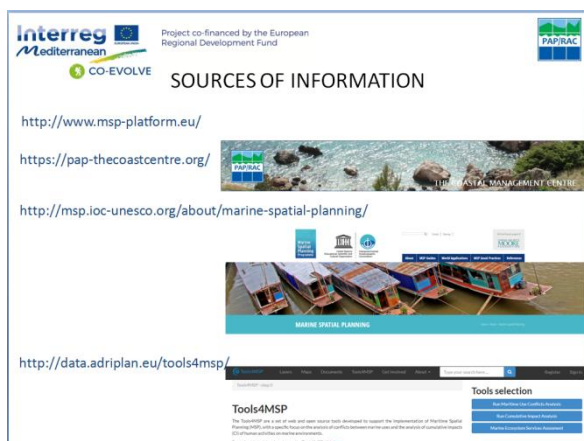
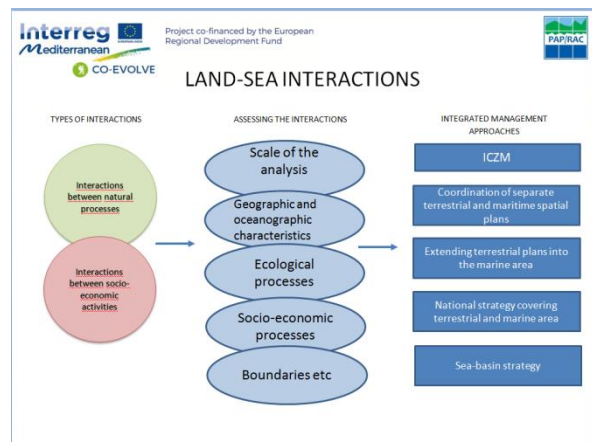
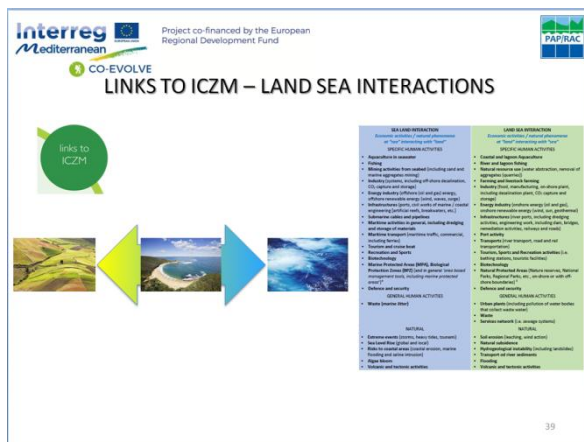
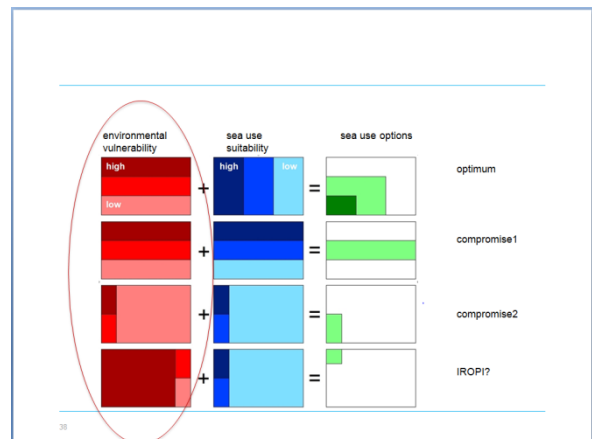


|   |  |
|---|--|
| <p><b>SD 5 Terrestrial</b></p> <p>Common Indicator 12: Concentration of key nutrients in water column (SDI).</p> <p>Common Indicator 14: Chlorophyll concentration in water column (SDI).</p>   | <p><b>SD 10 Biodiversity</b></p> <p>Common Indicator 1: Habitat distribution range (SDI) in the coastal marine environment in a relevant habitat.</p> <p>Common Indicator 2: Conditions of the habitat's typical species and communities (SDI).</p> <p>Common Indicator 3: Species distribution range (SDI) related to marine mammals, seabirds, marine reptiles.</p> <p>Common Indicator 4: Population distribution of selected species (SDI) related to marine mammals, seabirds, marine reptiles.</p> <p>Common Indicator 5: Population demographic characteristics (SDI), e.g. body size or age class structure, sex ratio, fecundity rates, survival, mortality rates related to marine mammals, seabirds, marine reptiles.</p> |
| <p><b>SD 10 Marine life</b></p> <p>Common Indicator 12: Trends in the amount of time visited where and/or deposited on sensitive (SDI).</p> <p>Common Indicator 13: Trends in the amount of time in the water column including <i>macroalgae</i> and on the seabed (SDI).</p> <p>Common Indicator 14: Trends in the amount of time spent by or emerging from marine organisms focusing on selected marine mammals, seabirds, and marine reptiles (SDI).</p> | <p><b>SD 10 Marine life</b></p> <p>Common Indicator 15: Trends in the amount of time spent by or emerging from marine organisms focusing on selected marine mammals, seabirds, and marine reptiles (SDI).</p>  |
| <p><b>SD 11 Energy including renewable energy</b></p> <p>Common Indicator 16: Proportional data and geographical distribution of wind, solar and mid-frequency hydro-magnetic energy sources that are likely to meet significant impact on marine water.</p> <p>Common Indicator 17: Levels of continuous low-frequency noise with the use of models or appropriate</p>   | <p><b>SD 11 Energy including renewable energy</b></p> <p>Common Indicator 18: Proportional data and geographical distribution of wind, solar and mid-frequency hydro-magnetic energy sources that are likely to meet significant impact on marine water.</p> <p>Common Indicator 19: Levels of continuous low-frequency noise with the use of models or appropriate</p>  |
| <p><b>SD 14 Biodiversity</b></p> <p>Common Indicator 20: Location and areas of the habitat required directly by hydrographic parameters (SDI) or also find the assessment of SDI on habitat areas</p>   | <p><b>SD 14 Biodiversity</b></p> <p>Common Indicator 21: Length of coastline subject to physical disturbance due to the influence of near-shore currents (SDI).</p> <p>Common Indicator 22: Land use change (SDI).</p>   |









## V. Sustainability Indicators: Tourism Sustainability at local scale through sustainability Index

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### Stakeholders involvement and participatory approaches

Sabrina Franceschini  
Emilia-Romagna Region

1<sup>st</sup> Training Course  
7th March 2018– Bologna ( Italy)

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### Definition

A **participatory process** is a way to **involve** citizens, stakeholders, and communities in defining plans and taking decisions that affect them, making it easier to implement since they are defined together.

The process must always "be linked" to a **well-identified need**, because if it really serves to achieve a result will most likely be "used".

Participation works where it represents the answer to a **real need / problem** that affects not only those who promote the process, but also potential participants. Furthermore, it is important that there is no **pre-established** or '**pre-packaged**' solution to resolve the issue, nor a preference for one option over another: there should be a **genuine willingness to open up to dialogue** on the object identified. This does not mean delegating the responsibility of a decision to the participants, but taking their demands into **real consideration** and, in the event of a decision that is different from them, being prepared to motivate this choice in a **transparent** manner.

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### Why

- To achieve **more information and elements** about the decision from the actors involved
- To make **more viable the implementation** of decision because the point was discussed before
- To prevent or deal with conflicts in advance
- To get the **collaboration** of community for the co-produced policies
- To make **more informed and responsible** the citizens and stakeholders

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### When

A) **When the contribution of other subjects is required:**

- In the case of co-produced Policy:** it is necessary that the recipients of a specific policy, in addition to putting their different points of view and interests on the table, are actually involved in the implementation of the process; also contributing effectively to the solution of the problems. To this end, it is essential to correlate the specific skills of the sectors, and / or actors involved. The objective will be achieved if we can achieve that there is no distinction, but rather cooperation and integration, between decision makers and recipients.
- In the absence of cognitive elements:** in cases where you do not have certain cognitive resources, or you only have partial information and to proceed, it is necessary to involve other (technical) subjects able to integrate them with their contribution.

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### B) In the presence of conflict:

Hardly a political choice will not dissatisfy someone: citizens, group or stakeholder that is. The participatory process aims, in fact, to resolve conflicts and disputes. Conflicts related to the theme (to the object, or to the context) concerning the participatory process can be managed according to two distinct models.

- To avoid interferences that could compromise the work, which is thus carried out with discretion. However, this choice often ends up by exacerbating the conflict, as people sooner or later realize that administrators have made crucial decisions on issues that concern them without consulting them.
- On the contrary, provoke in advance the reactions of the stakeholders and potential opponents through an early communication, which arouses interest around the project can induce them to think about the problem, and not only on a specific solution, and then push them to engage in the formulation of new and innovative ideas and proposals.

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### Benefit

A participatory process can:

- improve the **quality of public policies**, closer to the real needs of all those involved, thanks to their ideas and suggestions, through which a more complete knowledge of a given reality or of a given territory can be achieved;
- empowering and motivating citizens**, and local actors/stakeholders, in implementing the choices taken collectively, particularly in the case of policies that need to be co-produced;
- activate processes of active citizenship able to strengthen **social cohesion** and a sense of belonging;
- managing and reducing conflicts, increasing **trust in institutions** and countering the lack of legitimacy and consensus;
- increase the level of **transparency and openness** of the work of the administration that promotes it.

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## Phase of the policy and participation's level

At the start of a participatory process it is necessary that the Administration establishes explicitly the objectives and conditions within which the process takes place, make a real "Participatory Deal" with the subjects involved: in order to avoid misunderstandings and disappointments from them.  
A process of participation must fit properly within the institutional process envisaged by the public policy of reference.

| Level               | Description  |
|---------------------|--|
| INFORMATION         | The promoter of the process provides information on a project (or a policy) implemented or which it intends to carry out. All decisions have already been made.  |
| CONSULTATION        | The promoter of the process asks for feedback from the participants on a project (or a policy) that it intends to carry out. In this way they have the limited opportunity to influence certain aspects of the decision.                                       |
| PARTICIPATED DESIGN | The process promoter analyzes problems, defines strategies and designs solutions together with the participants. Decisions are made on the basis of the skills, resources and responsibilities of both the promoter and participant bodies, or in partnership. |
| EMPOWERMENT         | The participants are able to autonomously manage proposals and projects on which they are looking for a confrontation with the public body: they are an active part of the decision-making process.  |

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## Phase of the policy and participation's level

**LEVEL OF INVOLVEMENT**

INFORMATION  
CONSULTATION  
PARTICIPATED DESIGN  
EMPOWERMENT

*In Co-Evolve WP4, the participation level for the definition of local action plans, tools and measures for sustainable tourism development in the pilot areas, is expected to be as "participated design" (or even "empowerment"). The "basis/preliminary document", as defined, mainly represents -and should be clearly presented as- a first input to stimulate reactions, ideas and proposals by the participants.*

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## Six Methodology Steps

1. Context analysis
2. Stakeholder involvement and partnership building
3. Plan of activities
4. Set up of tools
5. Plan implementation and monitoring
6. Evaluation

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## 1. Context analysis

The aims is to reach information about the social context for better design the process and involved the target.

The analysis could include:

- socio-demographic, cultural and economic **profile of the community** which highlights the resources present, with the aim of identifying suitable ways to involve citizens and stakeholders
- **preview similar experience** in the same field (participation) or policy also by other subjects
- description of **strength and weakness** present in the community or in the organization in which the process takes place (both in terms of qualified personnel, and in regulatory and legislative terms).

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## 2. Stakeholder involvement and partnership building

Potentially all people could give useful contribution to our process ☺  
But we have some formal methods for selected them:

- The **"door open"**: in this case we promote the workshops and the people choose if the events are of their interest or not. This methods is also called "auto-selection". Needs more investment in communication and it's indicated for some very wide impact theme.
- The **"stakeholder map"**: as says the name, we decide who to invite beside the selection work. The map have to include all the actors who will be have potential effect by the decision discussed during the process.
- The **"random sample"**: this procedure is represented by the random selection of a sample of the reference population, which can be non-stratified or stratified on the grounds of specific social and demographic characteristics

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## Working group

When several stakeholders, even belonging to different organizations, are involved in the process management, it could be useful to set up and formalize a working group whose main objective is to **share the definition of strategies** and organizational/management methods of the participatory process.

The Working Group (or control room) includes all parties operationally involved in the management of the various phases of the participatory process, such as the person in charge of the process manager, one or more coordinators and officials and technicians belonging to the various entities involved.

The presence of **different points of view enriches and helps to create synergies** and potentials within the working group, but the responsibilities must be clearly defined and, if possible, even the precise activities to be performed by each member by scheduling tasks even on the basis of the different expertise and availability of the members, so that it is absolutely clear **"who does what."**

It is important to keep in mind that since not everybody is familiar with the group's work method, conflicting dynamics can easily emerge and thus slow down or block the activity.

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### 3. Plan of activities

The participation process is like a project, so for the plan we propose the classical project management scheme.

|                       | Description | Indicators | Verification's sources |
|-----------------------|-------------|------------|------------------------|
| Aims                  |             |            |                        |
| Expected results      |             |            |                        |
| Activities to achieve |             |            |                        |

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### Defining objectives and activities of the participatory process

Defining the objectives to be achieved, or the purposes to be pursued by the participatory process, is a complex and never dull operation. To facilitate this task, it may be worthwhile to refer to the "SMART objective" concept developed as part of project management.

Each objective identified for the process must be:

- Specific** (i.e. it should be formulated in a clear and well detailed manner in all its aspects, so as to leave no space for ambiguity);
- Measurable** (It must be possible to identify an appropriate criterion for measuring, preferably shared by all players in the game, in order to objectively understand whether the goal has been achieved or not, and how much you are away from the goal);
- Accessible** (the goal must be actually feasible, given the available resources and means);
- Relevant** (on the one hand, it must be consistent with the mission of the organizational context in which the group operates and, on the other hand, it must be relevant also for those who will be involved in the participatory process);
- Temporally defined** (i.e. the time within which the target must be reached must be clearly established).

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To carry out this activity for each identified objective, it is necessary to establish:

- expected results** (i.e. tangible and intangible changes and / or improvements, consistent with the objectives, expected both in the short and long term from the participatory process);
- activities to be carried** (i.e. the main actions to be undertaken to achieve the expected results).

Measurement indicators are defined respectively for the targets, the expected results and the activities, as well as the related sources of verification used for gathering data and information for measurement purposes.

In addition, for each activity to be carried out, it is necessary to identify the subjects that will be responsible for them, depending on the actual availability and specific skills, the people who will be involved operationally, delivery times and costs associated with each individual activity.

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### 4. Set up of tools

Based on the specificity of the process, you must decide how to articulate the steps online and offline, what tools and techniques to be used, the number of meetings, work methods, the time required and whether or not to use external or internal moderators / facilitators, if available.

In general:

- It's always recommended to use an **integrated approach** in term of channels: traditional and new media have to be used both.
- The external support, in particular for **workshops facilitation**, it is important for professional aspect but also for role of moderator and guarantee.
- The internal team have to be prepared through **specific training**.

*When processes take place in a structured way following well-defined, often coded, methodologies and techniques, the presence of experienced staff able to facilitate and handle them becomes essential.*

*The use of professional facilitators is intended to reduce some negative phenomena that often characterize group dynamics (ideological polarizations, conflicts, dominance, difficulty to express one's thoughts, etc ...) and to encourage the development and sharing of new ideas and perspectives.*

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### 5. Plan implementation and monitoring

This phase is the core of the process. We have to implement the action plan and to tackle the possible deviation.

In general the points of attention are:

- Check the **list of stakeholder** to invite;
- To activate in time the **internal and/or external resources**;
- To organize the (eventual) workshops locations and pay attention to the **logistic aspect**;
- Use all channels, traditional and digital, to **promote the process**;
- Collect the data** expected for monitoring the process indicators.

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### Monitoring the participatory process

Monitoring consists of a systematic activity of collecting data and information on the progress made in the process. More specifically, using the verification indicators and the sources identified above the following items can be analyzed:

- the achievement of **expected (short-term or partial) results**, in which various aspects are taken into consideration, such as the (qualitative and quantitative) participation level, the tools and techniques used, the administration's response capability;
- any **criticality and unexpected elements**, taking account of reports made by both internal administration officers and by external facilitators and / or by participants themselves in the process, concerning, for example, any barriers to participation, citizens' needs, the relevance of the object under discussion for participants;
- opportunities**, both external or internal ones in the process, yet unknown at the design stage that are likely to improve it, such as, for example, the possible involvement of new subjects coming from civil society during the ongoing process itself.

All information collected at this stage, once processed by the working group and translated into appropriate **corrective actions** to be implemented, will be functional to any strategic and operational adaptations.

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## 6. Evaluation

Two reason for evaluate:

- To measure the **real impact of the process** in relation to the aims in the context.
- To measure in term of **benchmarking** in relation to other similar project.

Two dimension for evaluation:

- The **process** (some indicators: inclusion, transparency, structure and methods, resources);
- The **results/outcomes** (some indicators: output, impacts, consequence for the participants).

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## Indicators

For the **process**, the verification parameters are those listed below:

- Inclusion** of all the points of view on the object under discussion.
- Transparent communication** and maximum circulation towards the entire information community, in every phase of the process.
- Use of methodological techniques and tools** tailored to the specificities of the case and to the resources (human, financial and territorial) available.

As regards, finally, the resources to draw on for the process, it is necessary to take into account the total cost / number of participants; and of the total cost of the process / n° ideas or proposals emerged.

For the **outcomes**:

**Output:** formalization in a document of ideas and heterogeneous contributions collected during the comparison with the participants.

**Effects on participants:** satisfaction with personal experience; satisfaction with the process and the outcome; improvement of the perception of personal ability to bring useful contributions to the process.

**Impact:** what impact the participatory path has had on the decision / policy.

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## Emilia-Romagna's pilots

- Local plans will be co-designed and verified also through the use of some specific participative patterns. The involvement of local communities and the actors on which the plans will have the impact, is intended in defining objectives and actions more suitable, adequate, functionally and responsive to actual needs, and, therefore, more easily reachable.
- For the two pilots scheduled in the current project, different paths are under definition: on the grounds of specific contexts and needs, to which the same methodology will be applied. This will allow to have, at the end of Co-Evolve, two case-studies, with related action plans agreed with the communities and the local stakeholders.

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## Participatory process - Building

Involved subjects and main local stakeholders (first screening)

| Cattolica's Pilot Area  | Comacchio's Pilot Area  |
|---|---|
| <ul style="list-style-type: none"> <li>Cattolica Municipality (Tourism, Environment)</li> <li>Fishermen Associations</li> <li>Dockyards companies</li> <li>Marina management companies</li> </ul> | <ul style="list-style-type: none"> <li>Comacchio Municipality (Tourism, Environment)</li> <li>Associations of Local Companies (Seasides, Hotels)</li> <li>NoProfit Associations and Cooperatives</li> <li>Local communities and citizens</li> </ul> |

In the frame of **design of participative processes** some further mapping of the subjects, stakeholders, representatives, communities and local players to be involved in the process of participate formulation of local plans.

E-R regional structures involved: Soil and Coast Protection and Land reclamation Service, Civil protection Agency Service Area Reno and Po di Volano, Tourism and Commerce, Water Protection, Communication.

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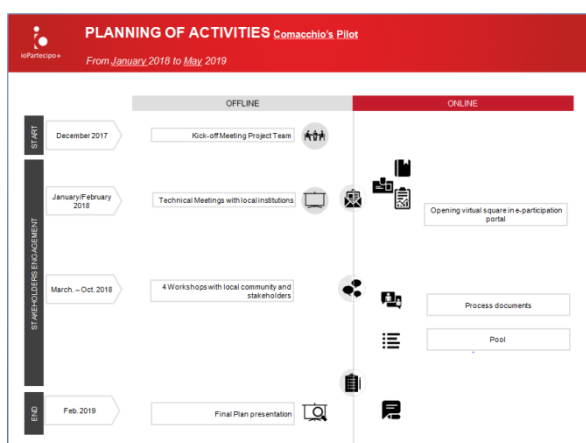
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## Participatory processes – Local Laboratories

- Cattolica:** The process is finalized to identifying a model/agreement for the harbor management, through a mediation and negotiation activities among the stakeholders: Fishermen/Seamen/Dockyards, with particular regard to themes as seabed **monitoring and management** and **tourist/productive activities** related to the harbor. Three laboratories are foreseen.
- Comacchio:** The process is aimed to identifying proposals for utilization/fruit of the redeveloped beach following the requalification intervention, with **non-traditional/innovative and high-accessibility tourist/recreational features**. Four workshops with citizens and associations are planned.
- Methodologies:** The processes will be managed with the support of a specialized company that will facilitate both preparatory meetings with local project teams, and laboratories into the pilot territories, with techniques that will be defined, during the design phase, based on the specificities of the two different contexts.

The face-to-face meetings will be complemented by the use of the Regional platform of eParticipation [ioPartecipo+](#).

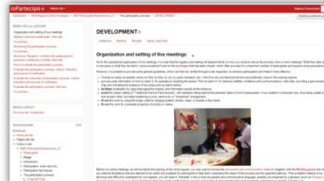
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**Self-Pa Course Texts on participation**

SELF is the e-learning system of the Emilia-Romagna Regional Government and the Public Bodies of its territory. It is a network of public organizations sharing technologies and human resources to carry out e-learning projects. The course on "Participation Experiences. Designing and managing participatory processes" is intended to provide a methodological and operational support to all those who intend to design, plan and manage a participatory process despite not having specific direct experience and expertise.




e-Learning federato per la pubblica amministrazione in Emilia-Romagna

It is designed as a fully self-learning course: none of the planned activities include any external evaluation: the results of the various verification tests do not affect the continuation of the course and only serve as a self-assessment tool for one's learning level.

The course includes 4 modules:

- Participation: when and why
- Participation tools and techniques
- Participatory process design
- Working tools



**Challenges and solutions**

| Challenge  | Solution   |
|--|--|
| New orchestration capability needs to be developed   | Team building and Action Planning  |
| Feedback mechanisms and participation are essential ingredients to developed effective policies  | Stakeholder engagement with innovative mechanisms                        |
| Discuss about technical problems and themes with citizens and local communities (non expert stakeholders)  | New language approach and new perspective                                |
| Institutions and Local Authorities go face to face with public: communication and participation is a risk? Public participation in decision making | Clarify public role and competences in a transparent and smart modality. |

**Tips to share**

**Tip 1**  
Taking the time to process design and internal sharing tip

**Tip 2**  
Do not be discouraged by the (normal) difficulty: every problem is a challenge to overcome

**Tip 3**  
Do not be afraid to do things they have never done: innovation goes from there!

**Tip 3**  
Participation is a hard task for citizens, but can be extremely interesting: dedicate your time in these initiatives!!

**THANKS YOU FOR YOUR ATTENTION!**

😊

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Twitter of the project: [@CoEVOLVEmed](https://twitter.com/CoEVOLVEmed)  
Web site of the partner: [www.regione.emilia-romagna.it/](http://www.regione.emilia-romagna.it/)  
E-part platform: <http://partecipazione.regione.emilia-romagna.it/lopartecipo>  
Twitter: [@lopartecipo](https://twitter.com/lopartecipo)

## ANNEX 4: QUESTIONNAIRE TO FINE TUNE THE TRAINING SESSION ON PARTICIPATORY APPROACHES

Dear partners,

As you know we are approaching the 1st training course of the Co-evolve project. One of the sessions is related to participatory methods that can enhance and increase the outcome of your action plans in the pilot areas. The participatory methods can offer a very wide spectrum of possible solutions, tools and approaches. To fine tune the activities and contents of the afternoon session of the 7th and therefore respond to your learning requirements we kindly ask you to answer, as individuals, to the following questions by Thursday the 1st of March.

The session will be exciting and interesting and through your answers even more targeted and stimulating.

Thank you!

The Co-Evolve team

**NAME**

**SURNAME**

**ORGANISATION**

**Email**

**(A) What is your interest in participatory methods and facilitation techniques?**

- 1) No interest at all
- 2) Scarce interest
- 3) Medium interest
- 4) Very interested
- 5) Extremely interested



**(B) What is your knowledge and personal experience of participatory methods and techniques?**

- 1) I have no knowledge or experience
- 2) A scarce knowledge and experience (eg. have participated or organised 1-2 participatory workshops)
- 3) An average knowledge and experience (eg. have participated or organised 3-5 participatory workshops)
- 4) A good knowledge and experience (eg. participated or organised 7-10 participatory workshops)
- 5) I have an extremely high knowledge and experience (eg. participate and organise participatory workshops all the time)

**(C) Do I want to learn how they work and do participatory methods apply?**

Yes, because .....

No, because .....

**(D) What is your experience in using participatory methods?**

- 1) A very negative experience.
- 2) A negative experience.
- 3) No opinion.
- 4) A positive experience.
- 5) A very positive experience.

Why? Please give an example and description that describes the experience and your perception in using participatory methods (maximum three lines).

**(E) What were the topics and challenges that were addressed in your participatory projects?**

List the topics and areas covered by participatory processes.

**(F) What would I like to learn from participatory methods?**

List things you would like to learn

**(G) Which participatory methods do you know from direct experience as participant, as organiser (or facilitator)?**

List the methods known for direct experience

**(H) Which participatory methods you can use and facilitate.**

List the methods that you know how to use and facilitate