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 7th 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 7th 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 practices. 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

<table>
<thead>
<tr>
<th>Partner</th>
<th>Name</th>
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<tbody>
<tr>
<td>PP1</td>
<td>Region of East Macedonia and Thrace</td>
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<td>PP1</td>
<td>Region of East Macedonia and Thrace</td>
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<td>PP2</td>
<td>CPMR Intermediterranean Commission</td>
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<td>Agence Trajectoires</td>
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<td>PP3</td>
<td>University of Thessaly</td>
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<td>PP3</td>
<td>Futour</td>
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<td>Dubrovnik Neretva Regional Development Agency</td>
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<td>PP7</td>
<td>Institute for spatial planning of the Dubrovnik Neretva County</td>
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<tr>
<td>PP7</td>
<td>Institute for spatial planning of the Dubrovnik Neretva County</td>
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<tr>
<td>PP8</td>
<td>Department of Hérault</td>
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<td>PP8</td>
<td>Hérault Tourisme</td>
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<td>PP9</td>
<td>Public institution RERA SD for coordination and development of Split Dalmacija County</td>
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### 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

**1st Training Course**

**Draft AGENDA**

**Organizer:** PAP/RAC and EMILIA-ROMAGNA REGION

**Venue:** Emilia-Romagna Region, viale della fiera 8, Bologna

**Room B-C**

March 7th, 2018

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
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<tbody>
<tr>
<td>09:00 - 09:15</td>
<td>Welcome and presentation of the course programme (PAP/RAC: Marko Prem)</td>
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<tr>
<td>09:15 – 9:45</td>
<td><strong>Introduction to ICZM</strong></td>
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<td>PAP/RAC: Marko Prem</td>
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<td></td>
<td>ICZM Protocol, its main requirements and relation to MSP</td>
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<td>9:45 – 10:45</td>
<td><strong>Strategic planning for tourism development</strong></td>
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<td></td>
<td>IUAV: Filippo Magni, Federica Appiotti</td>
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<td></td>
<td>Introduction to strategic planning. Tourism-driven strategic planning at local level</td>
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<td>10:45 – 11:30</td>
<td><strong>Sustainability indicators</strong></td>
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<td>UTH: Tonia Koutsopoulou</td>
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<td></td>
<td>Sustainability indicators for sustainable tourism planning at local level</td>
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<td>11:30 – 12:00</td>
<td><strong>Coffee Break</strong></td>
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<tr>
<td>12:00 – 13:00</td>
<td><strong>Marine Spatial Planning and Land-Sea Interactions (LSI)</strong></td>
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<td>PAP/RAC: Marina Markovic</td>
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<td></td>
<td>Introduction to MSP, its main characteristics and steps when preparing a MSP plan. Importance of LSI</td>
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<td>13:00 – 14:00</td>
<td><strong>Lunch Break</strong></td>
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<td>14:00 – 15:00</td>
<td><strong>Stakeholders involvement and participatory approaches</strong></td>
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<td>RER and Futour: Sabrina Franceschini, Paolo Martinez, Ana Maria Solis</td>
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<td>Need for and ways of stakeholders’ involvement. Methodology for the participative process. Techniques/tools for effective participation</td>
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<td>15:00 – 15:30</td>
<td><strong>Coffee Break</strong></td>
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<td>15:30 – 16:30</td>
<td><strong>Needs assessment for Pilot areas</strong></td>
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<td></td>
<td>PAP/RAC: Marko Prem, Veronique Evers, Futour</td>
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<td>Discussion about the very needs of the Pilot areas in order to tailor the 2nd training course, by using participatory techniques</td>
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<td>16:30</td>
<td><strong>End of the course</strong></td>
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ANNEX 3: POWER POINT PRESENTATIONS OF THE TRAINING COURSE

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

ICZM Protocol - its main requirements and relation to MSP

Marlo Prem

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

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

Coastal urbanisation!

- rapid expansion, “litoralisation”

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

Land take 1975-1980
Land take 1980-2000
Land take 2000-2015
Tourism!
- 637 mio tourists in 2025, 273 mio more than in 2000
- A Sustainable Future for the Mediterranean
  BP/RAC E&D Outlook

Evolution of ICZM 1975 - 2018

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

- ICZM Protocol signed (Madrid, 21 Jan 2008)
- To date: 15 signatories, 9 ratifications
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)

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.
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 (Syrac, Algeria) and panels (Turkey)
- Workshop 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 Hadda, Morocco)
- Clean up campaigns (Morocco, Algeria, Egypt, Syria and Greece)
- Photos, posters and other exhibitions
- Drawing contests (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

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 Reghala (Algeria)

CAMP Levante de Almeria, SPAIN

- SF of San Juan
  - Marine: 71,090 ha
  - Terrestrial: 146,972 ha
  - 8 Municipalities
- Semi-end 200mm/year: High vulnerability to climate change
- Important cultural and natural heritage;
- A high % under some forms of official protection;
- Rapid changes in the land uses: tourism and agriculture
- Complex normative and management frameworks

CAMP Levante de Almeria
Institutional coordination body

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

Programme cofinanced by the
European Regional Development Fund
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

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
Kad Su Ivana 111
21000 Split, Croatia

www.pap-thecoastcentre.org
II. Introduction to strategic planning. Tourism-driven strategic planning at local level

**Agenda Plan**

- Grocery list
- Sport strategy
- Travel plan

*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, 3603
Spatial Focus

1. Planning gives geographical expression to the economic, social, cultural and ecological policies of society. It is at some 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: Court of Europe, 2003 -
Why would you like to design a tourism-driven strategic plan for my area?

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

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

- Definition of the working team (COORDINATION)
  - scientists, GML experts, communications change management specialists, economists,
  - regulators, business and industry leaders, citizens groups,
  - ...

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

- Identification of stakeholders (INCLUSION and VALIDATION)
  - Local authorities, local governance
  - Local interest group
  - Local people, citizens
  - Business community
  - Community and community organisations

Critical issues in the planning processes

Which barriers do you face in the development of your local tourism plan?

- Lack of information for decision making
- Lack of economic resources
- Disputes among stakeholders
- Lack of coordination

Main barriers to action

- Lack of information for decision making
- Lack of economic resources
- Disputes among stakeholders
- Lack of coordination
- The absence of stakeholders’ involvement

Programme cofinanced by the European Regional Development Fund
Critical issues in the planning processes

Main barriers to action
- Lack of information for decision making
- Lack of economic resources
- Fragmentation of decision-making
- Duplication and overlapping
- Regulatory and institutional constraints
- Lack of leadership
- The unknown risk perception

Data collection
- Studies & Surveys

Identification of trend and direction of growth, Traffic survey, Study on demography, Climate, Resources and other potentials

STARTING POINT 2
STEPS OF TOURISM-DRIVEN STRATEGIC GUIDELINES

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

Collect and provide
- Data
- Information

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

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

Programme cofinanced by the European Regional Development Fund
Maps, graphs, charts etc. help to design long term & short term objectives and goals, identifying the priorities, issues and the vulnerable areas.

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

**STEP 1:** 
Analysis of collected data in order to obtain a knowledge framework useful to construct planning priorities and subsequent goals and objectives

**2. Presentation of analysis to technical stakeholders**

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

**STEP 2:**
Building knowledge framework

**STEP 3:** STEPS OF TOURISM-DRIVEN STRATEGIC GUIDELINES

Focus: Set the main planning direction

- Addressing the strategic issues emerged;
- Ensuring coherence and compliance with ICZM and ST principles and goals
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 modify the bad effects of past growth;
- to improve the transportation facilities;
- to mitigate the measures utilized;
- 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 an opportunity for involving the public.

### Example: Vision of Alexandroupoli

The Alexandroupoli coastal area, on the Region of Eastern Macedonia and Thrace (WEST), is considered an example of thorough literary attention of various location in strategic position (at the center of land and sea routes connecting Greece with Turkey), for tourism development. Despite this, the competition in terms of tourism offer is very high everywhere.

Based on this, the area will try to increase and narrow the tourist offer in a sustainable and effective way. In order to achieve this, an improvement and intensification of the accessibility and the creation of a network of tourist products will take place. This network will be shaped through the intervention of interventions between the social and natural landscape systems. The increase of accessibility options and the plan of city development will consequently act to promote a conservation of the nature-based tourism and to offer a protection of the coastal area from erosion and climate change emerging problems in order to increase the economic and cultural benefits of the area.

Strategic axes of development identified by the INTERREG MED programme and the strategic sub-objectives specified for each axis.
Consider the political and administrative organization of your area, how the relations with the TISP can be strengthened through objectives implementation?

The strategy should be a logical output of the preceding steps of the process.

The tourism-driven strategic plan is an integrated set of desired and integrated outcomes in which the actions for the realization of them are explained through an action plan (WPA objective).

WHAT ACTIVITIES ARE TO BE Undertaken?
- How will each activity contribute to specific vision, mission, goals, objectives and strategic priorities?
- What specific results will be achieved?
- When will these results be achieved?
- Who will help achieve these results?
- What resources will be needed to achieve these results?
- How will the results be monitored?

Example 1.

Barcelona Strategic Tourism Plan 2020

Welcome Summary


MA.3. Ensuring Tourism in the Barcelona Metropolitan Area.

MA.4. Management and monitoring of the Special Urban Development Plan for Tourism Accommodation within the framework of comprehensive tourism management and strategic urban planning.

MA.5. Establishing a PDU management and monitoring team.

MA.6. Active policy on leased accommodation. Designing and launching active policies on leased accommodation to ensure a better relationship with the environment, promote social and environmental responsibility and highlight good business practices.

MA.7. Ensuring Tourism in the Barcelona Metropolitan Area.

MA.8. Establishing a PDU management and monitoring team.

MA.9. Designing a mediation service to improve relations between residents and legal tourist host (MPT) users.
Example 2. Strategy for Sustainable Tourism Development of the Carpathians

- 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.

Contacts

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

Task Leader: University of Thessaly
Harry Cocossis, Tonia Koutsopoulou

CO-EVOLVE 1st 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.

Sustainability Indicators: Tourism Sustainability at local scale through Sustainability Index

II. Tourism Sustainability Toolkit – Analysis of the model

- Core Indicators
- Pilot Area Specific
- Destination Indicators

III. Key issues towards measuring sustainability at destination level

- Measuring sustainability at destination level
- How to define the destination
- How to adapt indicators at destination
- General Methodological Framework

IV. Methodological process – Key steps for adapting the Indicators

- Sustainability Toolkit
- Priority Indicators List

Priority Indicators List

- Selection of valid, relevant, and specific indicators associated to Mediterranean coastal destinations

Programme cofinanced by the European Regional Development Fund
IV. Marine spatial planning
Programme cofinanced by the European Regional Development Fund
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

Countries: Greece, France, Italy, Spain — Transposed in the Directive on territorialization

Responsible authorities:
- Ministry of Construction and Physical Planning (Ministère de l'Aménagement du Territoire et du Logement) in France
- Ministry of Environment and Energy (Ministry of Development and Environment) in Greece
- Ministry for Ecology, Transition and Inclusion (Ministère de l'Ecologie, de la Transition énergétique et de l'Inclusion) in France
- Ministry of Agriculture, Food and Environment (Ministerio de Agricultura, Pesca, Alimentación y Medio Ambiente) in Spain

In addition:
- Mediterranean Territorial Programmes and Interregional Structures for the Sea (Direction Inter régionale de la Mer - DIRM) in France
- 13 coastal autonomous regions in Spain
- Italian coastal regions
- 7 regions involved in coastal planning in Italy

GOVERNMENT-APPROVED MSP BY 2015

GRECE – MYRTOO SEA

ITALY

ASSIGNMENTS AND SOURCES:
1. Analysis of present and future maritime use
2. Key stakeholders
3. Specific activities / CW

OBJECTIVES:
1. Scenario

RECOMMENDATIONS:
1. Creation of stakeholder platform
2. Formulation of a proposal for MSP

ITALY

REGIONAL
MAP PROPOSAL
TRANSPORTATION
INTERREG

Mediterranean

Programme cofinanced by the
European Regional Development Fund
Programme cofinanced by the European Regional Development Fund
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?
V. Sustainability Indicators: Tourism Sustainability at local scale through sustainability Index

Why

• To achieve more information and elements about the decision from the actors involved
• To make more visible 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

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.

B) In the presence of conflict:
   Hardly a political choice will not displease 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.

1. 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.
2. On the contrary, provide 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.

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 processes 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 confidence;
   • Increase the level of transparency and openness of the work of the administration that promotes it.

Stakeholders involvement and participatory approaches

Sabrina Franceschini
Emilia-Romagna Region

1st Training Course
7th March 2018 – Bologna (Italy)

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 as they are defined together. The process must always be oriented to a well-defined need, because if it really serves to achieve a result it will most likely be "used". Participation works when 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 "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 elements 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.
Programme cofinanced by the European Regional Development Fund

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.

<table>
<thead>
<tr>
<th>Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>INFORMATION</td>
<td>The process of the process provides information on a project or a policy statement or what it intends to carry out, all documents have already been made.</td>
</tr>
<tr>
<td>CONSULTATION</td>
<td>The process of the process is to inform the participants on a project or policy that it intends to carry out. In this way, they have the potential opportunity to influence certain aspects of the decision.</td>
</tr>
<tr>
<td>PARTICIPATED</td>
<td>The process of the process is to involve the participants in the process of the project or policy, that is, their participation can influence certain aspects of the decision.</td>
</tr>
<tr>
<td>DESIGNED</td>
<td>The process of the process is to design solutions together with the participants, decisions are made on the basis of the skills, knowledge, and abilities of both the government and the participants.</td>
</tr>
<tr>
<td>EMPOWERED</td>
<td>The participants are able to autonomously manage proposals and projects on which they are looking for a collaboration with the public body, they are able to influence all the decision-making processes.</td>
</tr>
</tbody>
</table>

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

1. Context analysis

The aim of the context analysis is to identify information about the social context for better design of the process and involvement of 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 weaknesses 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).

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 methodology is also called “self-selection”. Needs more investment in communication and it is indicated for some very wide impact theme.
- The “stakeholder map”: as the name suggests, we identify who to involve beside the selection work. The map have to include all the actors who will have potential interest 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-representative or stratified on the grounds of specific social and demographic characteristics.

Working group

When several stakeholders, even belonging to different organizations, are involved in the process management, it can be useful to set up an informal or formal group whose main objective is to share the definition of strategies and organizational / management methods of the participatory process. The working group (or contact team) includes the parties operationally involved in the management of the various phases of the participatory process, such as the persons 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 allows to create synergies and potentials within the 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 method, conflicting dynamics can easily emerge and thus slow down or block the activity.
3. Plan of activities

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

<table>
<thead>
<tr>
<th>Description</th>
<th>Indicators</th>
<th>Verification's scheme</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aims</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Expected results</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Activities to achieve</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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 out (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 criterion of verification used for gathering data and information for measurement/purpose.

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.

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 use, the number of meetings, work methods, the time required and whether or not to use external or internal moderators/facilitators, 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 guarantees.
- The internal team have to be prepared through specific training, often professional role is in structured way following well-defined, often codified, methodologies and techniques, the presence of experienced staff to facilitate and handle them becomes essential.

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

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.

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 critical 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 internal or external 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 the new information collected at this stage, once processed by the working group and summarized into appropriate corrective actions to be implemented, will be functional to a management and operational adaptations.
6. Evaluation

Two reasons for evaluation:
- To measure the real impact of the process in relation to the aims in the context.
- To measure in terms of benchmarking in relation to other similar projects.

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

Indicators

For the process, the verification parameters are those listed below:
- Existence 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 specifics of the case and to the resources (human, financial and territorial) available.

As regards the final outputs, 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 / m² ideas or proposals emerged.

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

What impact the participatory path had on the decision/policy.

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 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.

Karenia/KoR area
- Karenia Municipalities (Savon, Environment)
- Fishermen Associations
- Oysters companies
- Marine management companies
- Local communities and citizens

In the frame of design of participative process: some further engaging of the subjects, stakeholders, representatives, communities and local players to be involved in the process of participatory formulation of localities.

Co-Evolve 2019 – 2021

Programme cofinanced by the European Regional Development Fund
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.

Challenges and solutions

<table>
<thead>
<tr>
<th>Challenge</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>New orchestration capability needs to be developed</td>
<td>Team building and Action Planning</td>
</tr>
<tr>
<td>Feedback mechanisms and participation are essential ingredients to develop effective policies</td>
<td>Stakeholder engagement with innovative mechanisms</td>
</tr>
<tr>
<td>Discuss about technical problems and challenges with citizens and local communities (non-expert stakeholders)</td>
<td>New language approach and new perspective</td>
</tr>
<tr>
<td>Institutions and local authorities go face to face with public communication and participation is a no! Public participation in decision making</td>
<td>Clarify public role and competences in a transparent and smart modality</td>
</tr>
</tbody>
</table>

Tips to share

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

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

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

THANKS FOR YOUR ATTENTION!

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Twitter of the project: @CoEvolveMed
Website of the partner: www.regione.emilia-romagna.it/
E-platform of the partner: http://partecipazione.regione.emilia-romagna.it/opartecip
Twitter: @oPartecipazione
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