



Sensory branding for ADRION Tourism



PROJECT ADRION 5 SENSES

T.1.3. Joint Strategic and Action Plan

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IDENTIFICATION SHEET

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INTRODUCTION

The aim of this activity 1.3. is to bring together stakeholders to clearly articulate the strategic direction and actions for the development, marketing and management of the ADRION destination for the future is key for this activity. The planning process is informed by the findings of the A.T1.1 and A.T1.2 to ensure that all existing knowledge is considered and incorporated into the strategic direction of the destination. The process includes:

- Development of a comprehensive stakeholder engagement process and clear definition of their roles and responsibilities in order to leverage skills/experience and provide focus for planning & management.
- Development of a shared stakeholder vision for ADRION destination management over time to agree a common direction and values and finally,
- Development of the Joint Strategy & Action Plan.

This Joint Strategy and Action plan will provide a long-term direction for the destination's development, marketing & management as well as short, medium and long-term actions to achieve the destination's vision.

This Strategy and Action plan has included outputs from the previous activities, specifically, T1.1.2. Synthetic Diagnosis and T1.2.1. Good Practices Guide, T1.2.2. Benchmark Analysis Report, Stakeholder Analysis (Activity C1. Communication). It was also based on the T1.3. Regional strategic and action plans were prepared by each partner by March 15, 2019. Those strategic and action plans were presented at the Regional conferences and discussed among key stakeholders. Based on their input, partners have prepared reports that were also a basis for developing the Joint Strategy and Action Plan for the Adrion region.

The process of developing the Joint Strategy and Action Plan included the following steps:

1. Development of the Draft Joint Strategy Plan (without the Action Plan part) on April 11, 2019.
2. Comments from project partners
3. Presentation of the draft Strategy Plan to project partners on May 16, 2019. in Ferrara
4. Workshop on April 18, 2019. In Ferrara to revise the Vision, Strategic Goals and develop the Action Plan - completed with the input from project partners

5. Development of the Final Strategy and Action Plan by May 2, 2019.
6. Comments from project partners by May 9, 2019.
7. Final version of the Strategy and Action Plan by May 10, 2019.

SITUATIONAL ANALYSIS

Summery from the T1.1.1. Market research, Competition Analysis and Trends per Region and T1.1.2. Synthetic Diagnosis reports

1. ANALYSIS OF THE DESTINATION

The Analysis of the destinations in the Adrion region included a comprehensive analysis of each partner region based on the Geographical and other characteristics of the region (spatial connection, modes of transportation and arrival, climate); Demographics - brief description of the demographic situation in the region as well as the Economic characteristics (characteristics of the labor market, key economic sectors, main sources of revenue). The Analysis is providing for each partner country, Albania, Bosnia-Herzegovina, Croatia, Greece the Regional Unit of Evia and Greece - the Region of Epirus, Italy, Montenegro, Serbia and Slovenia.

Albania

The Albanian Alps region (AA) is situated in the northern Albania, on the border with Montenegro and Kosovo. This region is distinguished for its contrasted relief, the Mediterranean mountain climate, natural parks and rich cultural aspects, which reflect a unique lifestyle where time seems to have stopped. Thanks to the morphology and nature (3 national parks and 2 regional parks), this region is described as a continuity of "Bjeshkët e Nemuna" Park in Kosovo and the "Prokletije" National Park in Montenegro. The morphological features, separate access to this region into two parts: the Western and Easter Alps Area. The Western part is easily accessible from Shkodra and Malësia e Madhe, and the Eastern Alps Area from Bajram Curri. The connection between the two parts of the Albanian Alps, could be done thanks to the ferry boat connecting Koman to Fierza, trails between Valbona and Theth, and the road connecting Vermosh, Plava-Gucia to Gjakova.

In the last Census 2011 the resident population of the Albanian Alps Region, was 28,006 inhabitants, representing about 1% of Albanian population and registering a low density of 14 inhabitants/km. According to INSTAT, the residential population of the Albanian Alps Region could be estimated to be 25, 071 inhabitants for 2018 (age-group 0-14 years old represent

20.5%, age-group 15-65 years old represent 65% and the age-group over 65 years old represent 14.5% of the population).

In general, the Albanian Alps must deal with increasing dependency ratio due to the decline in birth rate and the aging population. Because of the lack of access and interconnectivity with the local markets, the migration phenomenon is heavier in the central part of the AA, however the tourism development has a positive effect from the demographic point of view. The GDP and the GDP per inhabitant of AA is one of the lowest in Albania, approximately 2,716 EUR / Inhabitants. Agricultural and Services sectors are the most important sectors of the AA. However, the service sector is dominated by the public sector who is also the largest employer in the region, especially in the western part of the AA, while self-employment in agricultural sector is dominating the eastern part. According to the Census 2011, the unemployment ratio was estimated up to 47% for all AA, this ratio was even more important for young people under 25 years old, reaching 74%. The work force enjoys mostly a lower education, with an average of 9.2 year of education. Even if agriculture is one of the main activities supporting the family economy, the development of the tourism sector of the last 10 years has significantly influenced the income growth and employment and has had the effect of bringing back the population in the region.

Bosnia and Herzegovina

The Sarajevo macro-region (or the Central-Eastern Bosnia and Herzegovina economic geographic region) almost entirely (over 90% of space) includes the central and eastern part of the mountainous macro-region of Bosnia and Herzegovina, respectively the Upper and Eastern part of the Upper Gornjobosansko-lašvanska mezonegija. Given that the northern provinces passes through the 44th parallel (mountainous area of the Konjuh Mountain), this economic geographic region belongs to the transition zone between the southern extremities of the northern moderate land band in the northern parts of the northern subtropical landfill belt.

The Central and Eastern economic geographic region is characterized by two varieties of moderate continental climate, one mountain and one Alpine. A very dynamic and diverse relief caused the emergence of a dominant surface river network whose backbone is made up of

smaller rivers and streams with numerous waterfalls and diverse forest vegetation. Sarajevo's macro-region (SERDA region) occupies an area of 8,617 km², which makes about 16.8% of the total area of Bosnia and Herzegovina.

It is administratively composed of 32 municipalities (19 in the Federation of Bosnia and Herzegovina and 12 in Republic of Srpska). In this region there were 668,050 inhabitants in 2013, representing 18.9% of the total population of Bosnia and Herzegovina. In the period from 1991 to 2013, the Sarajevo macro-region has had a negative trend of population dynamics, which has resulted in a decline of population by 170,166 inhabitants (from 838,216 in 1991 to 668,050 inhabitants in 2013). The overall negative rate of reduction at the level of the entire region is 20.3%, and is slightly higher than the overall population reduction rate of Bosnia and Herzegovina (-19.3%).

The resource base of the region that could be used as a driver of economic development consists of: extensive and favorable structure of agricultural land, high wealth of high production quality forests, great wealth of water and considerable hydropower potential of the river, bigger reserves of coal, zinc and lead richness, rich sources of thermal and mineral water a long-standing tradition of agricultural production, forestry, mining, metallurgy, metal and wood industry, skilled and relatively inexpensive labor force, landscape beauty and rich cultural and historical heritage and developed traffic infrastructure. There is about 583 km² of cultivable land in the region, representing about 6.7% of the total area of this region. The land covered by forest areas and other natural vegetation (for example: wild blueberries, raspberries, forest strawberries, mushrooms, plants, flowers, etc.) is a significant resource that could be more effectively used.

This region had a GDP per capita in the value of 10,670 KM in 2013, which is considerably higher than the average for Bosnia and Herzegovina and the largest of all the regions of Bosnia and Herzegovina.

Croatia

Zadar County is in the central part of the Croatian Adriatic coast. The county is covering 3,643.33km² or 6.4% of the land area of the Country and the county has 34 municipalities and

6 cities. It is connected to the state roads and motorway Zagreb-Split, by the airline to the Zadar airport, by the ferry connection from Zadar with Ancona, Italy and by the railway with the rest of Croatia. The coast has a Mediterranean climate with warm and dry summers and mild and rainy winters. Interior of the County has firmer winters and higher daily and annual temperatures than islands. According to the 2011. Population Census, the Zadar region had 170,017 inhabitants. In the city of Zadar, as the center of the county and the largest city, lives 44.06%. The average age in 2001 was 39 years, and in 2011 was 42 years.

Aging of the population, emigration of the young people and reduction of the birth rate in the last decade has led to negative demographic processes. The working contingent of Zadar county is 111,652 persons according to the list of 2011. In the period from 2011 to 2015, the unemployment rate at county level was lower than the national average, and in 2014 was 16.3%. Economically active population in the county is 45.24%, while inactive is 54.76%.

Greece - the Regional Unit of Evia

The Regional Unit (RU) of Evia (which includes the island of Skiros), is next to the RU of Viotia (both part of the Region of Central Greece - "Sterea Ellada") on the east and on the south touches the Aegean Sea, on the north and northwest the Pagasitiko and Maliako Gulf, while on the west and southwest the north and south Evian Gulf. Evia, the second largest island of Greece and the third in the eastern Mediterranean, is located close to the Region of Attica. However, it has a somewhat mainland character, since two bridges - the modern, suspended one and the older, sliding one - link it to the mainland Greece. Due to its position, the region is adjacent to the national road of Athens - Thessaloniki and extends parallel with it. Capital of the RU is Chalkida. Evia has wonderful beaches, a pleasant climate and many thermal sources ideal for tourism.

The island extends over a surface of 3,580 km² and its coastline is 48 km long. Evia has 220,000 inhabitants. In general, the area's population is shrinking, following the national trend, compared to 2001 (previous national census). The RU of Evia has approx. 6.000 inhabitants less, which is a reduction of 2,5%. However, the distribution of the change is not equal among the municipalities, since the city of Chalkida (capital of the RU) had an increase of inhabitants of

11,4%, while other municipalities saw their population shrinking. For the Region of Sterea Ellada, main economic sectors include retail sales & tourism, the agricultural and fisheries industry, and the exploitation of natural resources including mining. Significant sector is also the public administration, which includes education, health and social workers on top of administrators.

Greece - the Region of Epirus

The Region of Epirus (ROE) is a traditional geographic and administrative region in the north-western Greece. It borders with the regions of West Macedonia and Thessaly to the east, West Greece to the south, the Ionian Sea and Ionian Islands to the west and Albania to the north. It is part of the wider historical region of Epirus, which overlaps with Albania and Greece, but lies mostly within Greek territory. ROE is largely made up of the mountainous ridges, which are part of the Dinaric Alps. The region's highest spot is on Mount Smolikas (2.637m). In the east, the Pindus Mountains that form the spine of mainland Greece separate Epirus from Macedonia and Thessaly. The climate of Epirus is mainly alpine. The city of Ioannina is the regional Capital. ROE has 336,856 inhabitants.

In general, the population of the area is decreasing, following the national trend. It is important to emphasise that some Regional Units face much larger decrease than others. The RU of Ioannina, which hosts the regional Capital, the city of Ioannina, has a small decrease (approx. -1.38% between the years 2001-2011) compared to RU of Arta (-12.23, between the years 2001-2011). The age and gender distribution is relatively equal, with the exception of the age group of 70+ inhabitants, which is significantly higher than the rest of the categories. This is a nationwide trend but is more evident in rural areas.

For the Region of Epirus, the main economic sectors include retail sales & tourism, public administration sector as well as agricultural and fishery industries. Public administration includes employees of educational institutes, like the University of Ioannina.

Italy

Ferrara is a province of the Emilia Romagna Region, which is located in the eastern part, in front of the Adriatic sea. Northern border of the Emilia Romagna region is the river Po, which flows into the sea with its delta in the provincial territory of Ferrara. Ferrara and the Emilia Romagna Region are well connected with national and international cities through the international airport of Bologna and highways - Bologna is an important road junction for connections between north and south of Italy, railways. All the cities of the Emilia Romagna region are also connected with the main Italian cities by an efficient local railway system and waterways.

From the Adriatic Sea to the Po Valley hinterland, the climate of Emilia-Romagna is extremely varied. The thermal excursion between summer, which can be very hot and sultry, and winter generally cold is great. The Emilia-Romagna is the first Italian region in terms of economic growth together with the Lombardia Region.

The number of companies in Emilia-Romagna is stable and exceeds 406 thousand units. The tourism industry of the Emilia-Romagna region closed in the first ten months of 2017 with almost 54 million visitors, which was an increase of 6.2% compared to the 50.8 million recorded in the same period of 2016.

Montenegro

Montenegro is in the west-central Balkans. It borders Croatia (Southwest), Bosnia and Herzegovina (Northwest), Serbia (Northeast), Kosovo (East), Albania (Southeast) and the Adriatic Sea (South). Its 23 municipalities cover the area of 13,812km². Podgorica is the administrative capital, and Cetinje is the Old Royal Capital and cultural centre. Main modes of transportation in Montenegro are air traffic (Podgorica and Tivat), railway traffic (Belgrade-Bar), maritime traffic (Port Kotor, Bar, Tivat) and road traffic (local, main and regional roads). Highway Bar-Boljare is currently under construction and it will be a major road traffic connection route once it is finished.

Montenegro is characterized by Mediterranean, continental and highland climate (Southern, Central and Northern region respectively). Summers are dry and hot in the Southern and Central region, while winters are rainy/snowy and harsh in the North.

According to the data from the last Census (2011), Montenegro had 620,029 inhabitants. Population density is 4.8 per km, while there is a big gap in territorial distribution of citizens since 63.23% of the population lives in the urban areas. There are more women than men in the population structure (51%). Data on distribution of men and women per age groups indicate higher representation of men in all age groups, other than 18+ (51.4% women) and 65 (57.6% women). High ageing index, especially for women (67.8) affects youth participation and leads to overall ageing population. Birth rate in Montenegro is 1.8, whereby it is mostly negative in the Northern municipalities (e.g. -12.9 in Plužine). Additionally, mortality rate increased from 2013 until 2017 (9.5 to 10.5), while the rate of natural increase decreased from 2.5 to 1.4¹.

Serbia

The region of Sumadija and Pomoravlje, located in central Serbia, represents 2 administrative districts with 13 towns and municipalities. The area is characterized by forests, green hills, orchards and vineyards of Sumadija in the west and the lowland of the Morava River in the eastern part. Kragujevac (178,368 inhabitants) represents the urban center of the region, about 140 km or 1.5 hours drive from Belgrade. Total area of Sumadija District is 2.387 km², of which 835 km² covers the City of Kragujevac that is also the largest settlement in the Region. Population of Sumadija District is 298.778 inhabitants with average density of 125 Inhabitants/km².

Pomoravlje district includes the city of Jagodina and five municipalities: Despotovac, Paraćin, Rekovac, Svilajnac and Čuprija. With a total area of 2614km² and 214536 inhabitants, Pomoravlje district has an average population density of 82 inhabitants per km². Due to its position, the region has historically gained the title of the traffic intersection of Serbia. The major traffic communication is international A10 corridor which runs the whole length of the

¹ Source of data: the Statistical Office of Montenegro (MONSTAT)

territory, a network of highways that connecting Sumadija and Pomoravlje with other parts of Serbia. Besides, the railway network in Lapovo, belongs to the railway lines leading south to Montenegro, Bulgaria and Greece, and to the north towards Hungary and Romania.

The region is characterized by moderate-continental climate with differences in microclimate primarily due to the height difference between parts of the region. It is characterized by a smaller amount of precipitation that makes it one of "drier" parts of the Republic of Serbia. The mountains have more moisture and winds blow from all directions. The strongest winter wind is kosava. Tourism in Sumadija and Pomoravlje compared to the key economic drivers of industry and agriculture, currently represents a less significant economic sector, therefore macro-destination is not fully recognized as a tourist destination. The existing tourism sector is concentrated in specific areas, but given the location and existing rich cultural and historical heritage, as well as the development of food production and changes in the business environment, it is an important development potential. Regarding small and medium enterprises that make up 95.3% of all registered companies in Sumadija and Pomoravlje, the most common sector companies belong to is the wholesale and retail trade, repair of motor vehicles (42.1%). Sector in which companies are also largely presented is manufacturing industry (23.3%), while the sector in which at least the companies are is transportation, storage and communications.

Slovenia

Goriska region, lies on the western part of Slovenia, in the basin of river Soča, between Julian Alps and Vipava Valley. Area of Goriška statistical region has 2.326 km² and it is the 4th biggest region in Slovenia. The region has 13th municipalities. The most of Goriska region are protected sites of natural heritage and more than 47,1 of the whole area is included in Natura 2000. Climate is continental with strong influence of the mediteran. Because of its mountains, hills, and deep narrow valleys, the northern part of the region is difficult to reach due to poor communication and transport means. The type of railway is a single track with no electrical power supply. The motorway is during the winter sometimes closed because of the Bura (northern) Wind, which impact the overall economic situation. In the Goriska region there are two airports used for sport and turist purposes. Close to the region (about 15 km) on the Italian

part, it is the international Airport of Ronchi, which improves the traffic accessibility of the region.

Goriska region had 117.747 inhabitants in 2017. Number of inhabitants has fallen in comparison with the year 2000. The density of settlements is less than 51 inhabitants per square km and it is the lowest in the state. Share of inhabitants younger than 14 is falling, share of old inhabitants (more than 64 years) is rising. The trend is same as in many other European regions. The unemployment rate is 10,5% (average of the 2012) and is one of the lowest in the Slovenia. But it is increasing. The bases of the economy of Goriska region represent the large companies with more than 52% employees regarding all active inhabitant of the regions. Those companies create 56% of revenues of the region. The main problem of the economy is a small number of innovation, slow development of tourist sector, the tourist offer is not well connected, the different institutions are also not cooperating well. The reason and also the consequence of this is the flee of the brains from the region.

2. RESOURCE ANALYSIS

In this section there will be an overview of key natural and cultural resources in each region. Although each region has an extraordinary resource, both natural and cultural, only the most significant ones were presented and listed in this Strategy and Action Plan.

2.1. Natural resources

Albania

In the AA there are 3 National Parks,

- **Natural Strict Natural Reserve of "Gashi River"** with an area of 3000 ha;
- **Thethi National Park** with a total area of 2,630 ha;
- **The Valbona Valley National Park** with a total area 8,000 ha.

Also, in this area, there are 2 regional Parks:

- **Regional Natural Park Nikaj-Mërtur**, with a surface of 17,505 ha;
- **Regional Natural Park Shkreli**, with a surface of 20,282 ha.

Considering that almost 61% of the AA region are parks area, this region should be developed according to the Park rules to protect and preserve natural resources, and limit the development, most specifically according to the *Central and Effective Management Area* and the *Sustainable Development and the Traditional Usage Area regulations*.

Bosnia and Herzegovina

The most valuable elements of the natural heritage were recognized through adequate legislative protection, which has resulted in the establishment of a number of laws for protected areas in this area. National and nature parks include the following:

- NP Drina (RS)
- SP Skakavac (F BiH)
- SP Vrelo Bosne (F BiH)
- ZP Bijambare (FBiH)
- ZP Trebević (F BiH)
- ZP Bentbaša (F BiH)
- The National Park Sutjeska extends to the areas of the municipalities of Foča and Gacko, with a total area of 17,350 ha and includes the protected area of Sutjeska, the strict natural reserve.

Croatia

Due to its great natural diversity, Zadar county and its close surrounding include the following significant natural resources, which include five national and three nature parks:

5 national parks:

- **Paklenica** - mostly located in the Zadar County area containing recognizable canyons is a valuable natural phenomenon that attracts many tourists and visitors, especially those that are attracted to hiking and climbing.
- **Kornati** - the most indented archipelago on the Mediterranean, with 140 uninhabited islands, islets and reefs.
- **Plitvice lakes** - the most visited Croatian national park, listed as a World Heritage Site by UNESCO.
- **Waterfalls Krka** - the most attractive carst river in Croatia.
- **North Velebit** - the most valuable and most attractive region of the summit area of Velebit in terms of the nature.

3 nature parks:

- **Telascica**
- **Vransko jezero**
- **Velebit.**

Variety, preservation and unique, yet different landscapes were the main reasons for proclaiming these areas nature parks. Besides the sea, they also include lakes and wetland habitats as well as the highest Croatian mountain massif of Velebit, an exceptional attraction for itself.

All the national and nature parks attract many worldwide visitors interested in different nature-based activities from bird-watching and biodiversity activities to outdoor sport and recreation. All of those activities are the basis for tourism promotion and development within the park rules and regulations.

Greece - the Regional Unit of Evia

Greece has an abundance of natural resources. Here are some most significant ones:

- **Small & Big Livari Lagoons & Deciduous Forests of Agios Nikolaos** (Natura 2000). An important resting place for migratory and over-wintering birds. The area provides amazing views and nature-full scents.
- **Dimosari Gorge** (Natura 2000). Area of ecological interest of extraordinary beauty and great variety of flora and fauna. Visitors tend to enjoy the view and experience scents and the feeling of plants and flowers.
- **Scotini Cave**. Featuring a vast array of stalactites and stalagmites, the discovery of artefacts dating back to the Neolithic era led to an in-depth expedition into the cave. The scents, the view of the natural shapes, the feeling of the rocks and the echo of the cave, create a mystical experience for the visitors.
- **Plane (platanus) forest of Kireas**. Home of the old platanus tree, aging more than 1500 years. The sight of its size and the overwhelming natural aromas create a unique feeling of calmness.
- **Petrified Forest of Kerasia**. A land of geological and archaeological interest which reveals paleontological treasures of ancient flora and fauna. Mesmerising for the eyes and unique feeling of the fossils found in the region.
- **Curative Springs of Aidipsos**. One of the oldest attractions with healing capabilities, the Springs of Aidipsos, offers a holistic experience for the senses. Their unique smell, the intriguing taste, the feel of the healing waters combined with the calming sound of

the running water and the view of the springs produces a signature experience for any visitor.

- **Lochadonisia.** A unique island complex of seven islands and islets. The location is addressed as “the Seychelles of Greece” due to their beauty and feel.
- **Euripus Tide Phenomenon.** A natural phenomenon due to the gravitational pull exerted by the Moon. Irregular currents appear and they produce an amazing phenomenon to watch and if brave enough, feel.

Greece - the Region of Epirus

The following are the most significant National parks and key natural resource sites in this region.

- **National Park of Vikos Aaos (Natura 2000)**, north of the city of Ioannina with great variation of biotopes and microclimatic conditions. The park also includes a famous UNESCO listed Geopark.
- **National Park of Pindus Valia-Calda (Natura 2000)**, isolated mountainous area with dense forest, rocky ridges, rapid streams and mountain lakes.
- **National Park of Tzoumerka, Peristeri & Arachthos Gorge (Natura 2000)**. Home of several rare and endemic species of plants and host of rare & protected species of mammals, birds, fishes and reptiles.
- **Lake Pamvotidas (Ioanninon) (includes 5 Natura 2000 sites)**, area of exceptional beauty, and eco-variety.
- **Acheron River & Delta (Natura 2000)**. The “river of woe” according to Greek mythology, that led to underworld. River of Hades according to Homer and Tartarus of the Roman poet Virgil. An area of awe for its beauty and significance.
- **Amvrakikos Gulf (Natura 2000 & Ramsar site)**. A complex ecosystem consisting of the shallow marine waters of the gulf itself, a rare wetlands formation of a double delta a lagoon system as well as a sea zone. One of the best conserved ecosystems with high ecological value at both national and international level. In it we can find at least all elements of a typical natural Mediterranean delta
- **34 Wildlife Sanctuaries.** The area has many protected Sanctuaries where wildlife thrives, and nature is protected.

- **Ioannina Aesthetic (periurban) Forest.** Protected, by the Greek legislation, natural area, designated both for protection and recreational activities.

Italy

Italy is known for its natural sites. Here is the list of most significant natural sites in the province of Ferrara.

- **Delta Po Park** - Valli di Comacchio, Saline di Comacchio, Pineta di Volano (Comacchio, Codigoro, Mesola, Goro), Natural Reserve Bosco Mesola (Mesola), Campotto Oasi (Argenta), Vallette di Ostellato (Ostellato)
- **Porporana Woodland** (Ferrara)
- **Panfilia Woodland** (Sant'Agostino)

All these natural sites in the province of Ferrara are important because they are recognized by Unesco and MAB Unesco sites² and are relevant within the Adrion project. They are located in a territory where a "slow" type of tourism is developing to discover natural sites where you can do birdwatching and at the same time visit the nearby historical centers of cities like Ferrara, Comacchio and Mesola with cultural attractions, while also tasting typical products of this territory.

Montenegro

Montenegro has 5 national parks (NP):

- **Durmitor** has been under UNESCO protection since 1980. It has many glacial lakes, which are called "mountain eyes" and, with Europe's deepest gorge (Tara Canyon), it is perfect for tourists who want to satisfy all their senses. Durmitor is home to many flora and fauna species (15% of the high mountain flora is endemic).
- **Biogradska gora** provides endemic species, beautiful landscapes, traditional architecture (katuni, savardaci) and festivals of gastronomy and active tourism.
- **Prokletije** has rich material and immaterial cultural heritage (architecture, folklore), beautiful nature which creates great potential for satisfying all 5 senses of its visitors.

² Source: <http://www.unesco.org/new/en/natural-sciences/environment/ecological-sciences/>

- **Lake Skadar** has many old monasteries, churches, roads and fishermen's villages. It provides a full 5-senses experience due to its culture, nature, active tourism (birdwatching, hiking) and gastronomy (fish, wine)³. Nature Park Piva is a natural connection between NP Durmitor and NP **Sutjeska** in Bosnia and Herzegovina, and it has a significant potential for providing tourists with a unique regional 5-senses experience.
- **Lovćen** is a testament of Montenegrin history and culture due to many protected monuments, the old caravan road from Kotor to Njeguši and the memorial monument dedicated to one of the greatest historical figures in Montenegro, Petar II Petrović Njegoš. It provides tourists with a great view from the top of the mountain, and they can indulge in traditional gastronomy in Njeguši, a historical village located in the region of the NP.

National parks take up 6,0% of the protected areas in Montenegro, while natural monuments, special natural areas and nature reserves take up the remaining 1.72% of the total protected area⁴.

Serbia

There are 30 local protected areas and the land use heritage locations at the territory of the region⁵. The most relevant natural resources include the following:

Landscape of outstanding qualities: Part of the area in the river basin of the Resava, Suvaja, Čemernica, Jelov stream and Beljanica river, Despotovac-Svilajnac

Nature Reserve:

- **Vinatovača, Despotovac** - the only rainforest in Serbia, beech rainforest, 37ha

Special Nature Reserves:

- **Kalenić, Rekovac** - forest area, forests of *Quercus frainetto* and *Quercus cerris* (oak species), the only protected area in Serbia with such forest ecosystem
- **Suvaja River gorge, Despotovac** - attractive with its high staircases, deep bays and numerous insufficiently tested caves

³ Source: <http://nparkovi.me/en/>

⁴ Source: <https://natura2000infocentar.files.wordpress.com/2011/01/zasticena-podrucija-crne-gore1.pdf>

⁵ Data available in the registers and site of the National environment protection agency

- **Resava River gorge, Despotovac** - Karst phenomenon of the whole area. Vegetation is very diverse and rich. In the gorge there is the Monastery of Manasija, from the 15th century (a cultural monument of exceptional significance)

Memorial Natural monuments (botanical, geological, hydrological):

- **Orašac, Arandelovac** - memorial complex - memorial hall
- **Mijajlova jama, Despotovac** - speleological facility, it represents a deep limestone in limestone in the forest at Pasuljan meadows. Based on the legend, the cave was named after the shepherd Mijail who pushed the ram while he was playing on the edge of the pit.
- **Gradište, Rača** - Viševac village, forest area, 39ha (linden, common hornbeam, oak)
- **Oplenac Park, Topola** - 83ha, in the park there are diverse and rare herbs, historical monuments

Nature areas around the material cultural heritage:

- Nature area around material cultural heritage **Manasija Monestery, Despotovac** - Monestery from 15th century, protected by Republic of Serbia, and monastery have entered a UNESCO Tentative List Process in 2010
- Nature area around material cultural heritage **Granica** in the immediate vicinity Sobrašica in Lužnice village, Kragujevac
- Nature area around material cultural heritage **Ivankovac, Čuprija** - Memorial Park "Boj na Ivankovcu" (Ivankovac battle)

Slovenia

In the Goriska region there are 59.799 ha of protected areas, of which 48.608 ha belongs to the National Park Triglav (TNP). This area is not a part of the Adrion 5 senses project but is worth mentioning (in total park consists of 83.807 ha) and 11.191 ha of Landscape parks. In this region there is also 115.745 ha of Natura 2000, which represents 49,78 % of the total Goriska region. Other natural resources are the following:

- **The Soča River** - a river 136 km long that descends quickly from its source in Trenta towards the sea.
- **The Trnovo Forest and the neighbouring Banjščice plateau** are the most north-western spur of the grand Dinara mountains. The mountainous area of the Trnovo Forest is karst-like, with no running superficial water, full of closed hollows, hills of different height and mountains, caves, abysses, shafts and minute karstic forms: scallops, grooves, rock holes, etc. Among the most impressive karstic phenomena are the caves with permanent ice and snow. The Paradana Cave, which is 385 m deep and 1550 m long, is one of the most renowned examples.
- **The Panovec Forest** - Nova Gorica is one of the rare cities in Slovenia which can boast of having such a large, preserved and interesting forest with numerous domestic and foreign tree species in the direct vicinity of the town.
- **The Plateau Nanos** - an independent mountain chain, which extends over 65 square kilometres and presents more than one half of the territory of the Vipava municipality. At 1313 metres Suhi vrh is its highest peak.
- **The Sabotin Hill (608m)** - lies at the junction of Pre-Alpine, Sub-Mediterranean areas and the Dinaric Alps.

2.2. Natural resources

Albania	Bosnia-Herzegovina	Croatia	Greece (Region of Epirus & Evia)	Italy	Montenegro	Serbia	Slovenia
<p>3 national parks:</p> <ul style="list-style-type: none"> • Natural Strict Natural Reserve of "Gashi River" • Thethi • The Valbona Valley <p>2 regional Parks:</p> <ul style="list-style-type: none"> • Natural Park Nikaj-Mërtur • Natural Park Park Shkreli 	<p>National and nature parks:</p> <ul style="list-style-type: none"> • NP Drina (RS) • SP Skakavac (F BiH) • SP Vrelo Bosne (F BiH) • ZP Bijambare (FBiH) • ZP Trebević (F BiH) • ZP Bentbaša (F BiH) 	<p>5 national parks:</p> <ul style="list-style-type: none"> • Paklenica • Kornati • Plitvice lakes • Waterfalls Krka • North Velebit <p>3 nature parks:</p> <ul style="list-style-type: none"> • Telascica • Vransko jezero • Velebit. 	<ul style="list-style-type: none"> • Small & Big Livari Lagoons & Deciduous Forts of Agios Nikolaos • Dimosari Gorge • Scotini Cave • Plane (platanus) forest of Kireas • Petrified Forest of Kerasia • Curative Springs of Aidipsos • Lochadonisia. • Euripus Tide Phenomenon • National Park of Vikos Aaos • National Park of Pindus Valia-Calda • National Park of Tzoumerka, Peristeri & Arachthos Gorge • Lake Pamvotidas • Acheron River & Delta • Amvrakikos Gulf • Ioannina Aesthetic Forest 	<ul style="list-style-type: none"> • Delta Po Park - Valli di Comacchio, Saline di Comacchio, Pineta di Volano (Comacchio, Codigoro, Mesola, Goro), Natural Reserve Bosco Mesola (Mesola), Campotto Oasi (Argenta), Vallette di Ostellato (Ostellato) • Porporana Woodland (Ferrara) • Panfilia Woodland (Sant'Agostino) 	<ul style="list-style-type: none"> • National parks (NP): Durmitor, Biogradska gora and Prokletije on the North, and Lake Skadar and Lovćen in the central region 	<p>Landscape of outstanding qualities:</p> <p>Part of the area in the river basin of the Resava, Suvaja, Čemernica, Jelov stream and Beljanica river, Despotovac-Svilajnac</p> <p>Nature Reserve:</p> <ul style="list-style-type: none"> • Vinatovača • Despotovac the only rainforest in Serbia, beech rainforest 	<ul style="list-style-type: none"> • NP Triglav (not in the project area but one of the most spectacular NP in Slovenia) • The Soča River • Brda • Trnovo Forest • The Panovec Forest • The Plateau Nanos • The Sabotin Hill

2.3. Cultural resources

The following table lists the most relevant cultural resources in each region.

Cultural resources							
Albania	BH	Croatia	Greece (Region of Epirus & Evia)	Italy	Montenegro	Serbia	Slovenia
<ul style="list-style-type: none"> • Shoshan Castle • Leka Castle • Rosuja Town • Dragobia Cave • Bajram Currit Mill • Mehmet Rama's House • Bajram Osumi's House • Sali Man's House • Mic Sokoli's Tower • Lulash Keci's House 		<p>Tangible heritage:</p> <ul style="list-style-type: none"> • Roman forum, • church of St. Donata - the simbol of the city, • the church of St Krsevan, • church and monastery of St Mary, • national square with the City lodge, • Church of the Holy Cross in Nin - the smallest 	<ul style="list-style-type: none"> • Naftilos - Natural Sea Life Museum • Museum of Natural History of Istiaia • Archaeological Museum of Chalkida • The Manos Faltaits Folklore Museum • Archaeological Site and ruins of ancient Eretria • House of Mosaics (Eretria) • Tomb of Eroles (Eretria) • Castle of Saint Paraskevi of Aidipsos • Taurus of Oreoi • Tower of Rovies 	<ul style="list-style-type: none"> • Unesco sites: City of Ferrara, Delta Po Park, Province of Ferrara ("Delizie estensi, Mab Unesco Delta Po) • Castello Estense (Ferrara) • Cathedral of Ferrara (Ferrara) • Pomposa Abbey (Codigoro) • Old Delta Museum (Comacchio) 	<ul style="list-style-type: none"> • Kotor Fortress • Stećci Medieval Tombstone Graveyards • Duklja (Doclea) • Crvena stijena (Red Rock Cave) • Ostrog Monastery • Biljarda (Billiard House) - old Royal Residence • Morača Monastery 	<ul style="list-style-type: none"> • Church St. George the Monastery • Manasija (Resava) • Voljavca Monastery • Miljko's monastery 	<ul style="list-style-type: none"> • Trnovo - WWII Memorial and Sepulchre • The Roman Stronghold Ad Pirum • Tower in Gonjače • The Baumkircher's turn • Sv. Pavel above Vrtovin • The Castrum Fortress • The Manor house Zemono • The stone railed bridge in Solkan • The Kostanjevica Monastery

<ul style="list-style-type: none"> • Ndue Mark Kolas's House • Marash Kolas's House • Shkurte Alija's House • Zef Koceku's House • The House of the Writer Martin Camaj • the Castle of Dalmacas • Koman's Old Cemeteries • Ballec Castle • Tamar Bridge over Cemi River of Vukl • Inn near the bridge 		<p>cathedral in the world,</p> <ul style="list-style-type: none"> • Benedictine Monastery, • Krupa Monastery <p>Intangible heritage protected by UNESCO</p> <ul style="list-style-type: none"> • ojkanje singing, glagolitic singing, • klapa signing, lace from the island of Pag, • traditional silente dance, specific cheese (skripavac) 	<ul style="list-style-type: none"> • Dodoni Sancuary & Theatre (Ioannina) • Fethiye Mosque (Ioannina) • Monastery of Molivdoskepasti (Konitsa) • Ioannina Castle (Ioannina) • Noktromanteion Acheron (Mesopotamos) 	<ul style="list-style-type: none"> • Mesola Castle (Mesola) • MEIS National Museum of Italian Judaism and Shoah (Ferrara) • National archeologica I Museum (Ferrara) • Diamanti palace (Ferrara) • Delizia Estense del Verginese (Portomaggiore) 	<ul style="list-style-type: none"> • Husein Paša's Mosque • Bar trikonhos 		<ul style="list-style-type: none"> • Sveta Gora - Holy Mountain • Kolovrat, Outdoor museum of the First World War • Kromberk Castle (Grad Kromberk) • The Dobrovo Castle • Coronini Manor House • Vogrsko Manor House • Village of Goče, Vipavski Križ, Šmartno in Goriška brda
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3. VISITORS' ANALYSIS

3.1. Brief analysis of the tourism in the region - key characteristics

The tourism in the Region of the Albanian Alps is mostly oriented towards natural activities as: hiking, trekking, walking in the nature, etc. Most of the tourists visiting the AA are international visitors coming from the Central Europe. The tourism service offer is still not developed completely. Some activities are still at the early stage of development, for example tourism products and services oriented towards local history and culture; handcrafts, outdoor activities etc.

The Sarajevo macroregion has exceptional preconditions for the development of all forms of tourism, which allows the duration of the tourist season throughout the year. In essence, it is about all types of recreational and excursion tourism that are realized by domestic and foreign tourists.

In Croatia, there are also excellent natural and climatic conditions for tourism development, but the tourism in this area is under-developed because of the unexploited potentials. Zadar County (seaside) is mostly recognized as a summer "sea and sun" destination with majority of tourists primarily coming with a purpose of spending time at the beach. Adding to the fact that most of the tourists visit the County in the highest of the summer season, the county lacks tourist facilities and offering that would attract guests in the off season and to the continental hinterland of the county (e.g. Benkovac destination). There is also a lack of qualified workforce in tourism. All these challenges contribute to a still weak tourist offering based on the valuable cultural and natural resources, which would extend to the off season and attract new types of visitors such as higher educated professionals interested in other types of tourism such as outdoor, cyclo-tourism, cultural/creative tourism as well as activities that would encourage integration with local communities and contribution to the local economy (i.e. voluntourism).

In Greece, Evia is one of the most developed areas in terms of tourism. In the Region of Sterea Ellada. The main tourism season of RU Evia lasts from June until September, like Croatian tourist season in the Zadar county. During these months, visitors spend more days in Evia than in any other season. The coastal areas of Evia concentrate the majority of accommodation

infrastructure. The area favors "sea & sun tourism" as well as alternative, nature-friendly, tourism. An upcoming product is also the experience of Sailing & Yachting, both in the coastline of Evia and in the island of Skiros, also like Croatian coast. Significant touristic interest has been developing lately around Evia's wineries and other local agricultural products.

The "national product" of Greece, the "Sun & Sea" tourism model is also very strong in ROE. Although it is a highly seasonal product, its revenues are multiple times higher than any other existing touristic product, making it not just a necessity but vital for the economic prosperity of any region in Greece. Despite that fact, ROE has one of the most important natural & cultural resources treasure in Greece. The multiple NATURA 2000 designated areas, along with its rich cultural heritage are valuable assets for a more sustainable, all year long, touristic product.

In Emilia Romagna and especially in the province of Ferrara, tourism is one of the prevailing economic sectors. The territory of Ferrara attracts many Italian and foreign visitors for the vast tourist offer - city of art, parks and nature reserves, beaches. Moreover, in 2017 the "Destinazione Romagna" program was set up, an agreement between the 4 provinces of Emilia Romagna that overlook the sea to improve the tourism products of Ferrara, Rimini, Ravenna and Forlì Cesena.

With its topographic features, as well as rich cultural and historical past, the region of Sumadija and Pomoravlje in Serbia could be a significant tourist and cultural destination for both domestic and foreign visitors. There are many tourist sites that provide opportunities for daily and longer trips both for local and foreign guests. In addition to natural beauty, there are significant tourist sites that provide opportunities for getting to know the history, culture and old and new traditions.

In Slovenia, considering an environment rich with mountains and rivers, sacral buildings, remainders of the First world war and Rapal border, wine regions, etc., tourism is oriented heavily towards natural and cultural heritage. Main reasons for visiting Upper Posočje * are sport and outdoor activities, in Idrijsko - Cerkljansko skiing * in Nova Gorica gambling and in Vipava Valley and Goriška Brda Gournment and Wine tasting with outdoor activities.

Tourism in Montenegro has been developing quickly in the past 10 years, which brought along many large infrastructural projects (Porto Montenegro, Luštica Bay, Porto Novi) oriented towards high-quality, 5-star tourism on the coastline. Montenegrin coastline is famous for its beautiful beaches and the number of tourists who visit the Southern region during the summer season is rising. The Northern region is famous for its beautiful mountains, landscapes, forests.

3.2. Analysis of accommodation capacities

Albania

There are currently 180 accommodation units in the AA, where: 148 of them are guesthouses, 21 are hotel, 9 camping areas, 2 hostels. The Accommodation capacity is estimated to 1079 rooms and 3,110 beds for all the AA.

Theth (850 beds), Valbona (653 beds) and Razma (355 beds) concentrate the largest accommodation capacity. According to the actual dynamics, it must also be pointed out the case of Vermosh valley knowing a keen interest due to the improvement of the access (actual capacity is estimated up to 157 beds).

Bosnia and Herzegovina

	No. objects	No. rooms	Capacity	No. objects
hotels	129	5047	10164	132
tourist resorts	1	35	160	2
tourist resorts	1	312	1320	0
tourist apartments				
4 stars camps				
camps include: Camping Village 5 stars				camps
apartments/rooms	34	214	591	1349
TOTAL	165	5608	12235	1483

Sources: Department of Statistics of Sarajevo Canton and Booking.com

SERDA collected official data for Sarajevo Canton for October 2018. from Department for statistics of Sarajevo Canton but these data don't show a real picture of the touristic offer in the Sarajevo Canton. One problem are many apartments, which are rented but it has not been reported and the owners avoid paying taxes (grey market). That is why Department for statistic of Sarajevo Canton show much smaller number of apartments then the number of apartments which are been presented on the Booking.com.

They have provided accommodation categories according to their categorization of touristic objects.

Croatia

Type of accommodation	No. of objects	Capacity
hotels	55	7040
tourist resorts	5	1906
camps	322	32288
apartments/rooms	33028	94870
tourist resorts	64	3122
auxiliary beds		30409
TOTAL	33474	169635

Greece (DAE)

Type of accommodation	No. of objects	Capacity
hotels	247	16.455
tourist resorts	N/A	N/A
Camps/farmhouses	10	667
apartments/rooms	870	13.555
auxiliary beds	1.130	6.170
TOTAL	2.257	36.847

Greece (ROE)

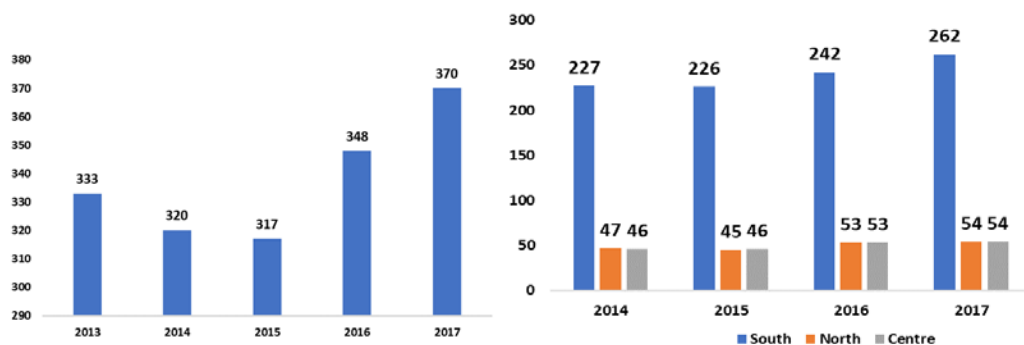
Type of accommodation	No. of objects	Capacity
hotels	413	17.060
tourist resorts	N/A	N/A
Camps/farmhouses	15	3.292
apartments/rooms	1.322	19.079
auxiliary beds	738	3.321
TOTAL	2.488	42.752

Italy

Type of accommodation	No. of objects	Capacity
hotels	98	6.750
tourist resorts	7	7.406
Camps/farmhouses	61	17.294
apartments/rooms	3.479	16.468
auxiliary beds	134	897
TOTAL	3.779	48.815

Montenegro

Number of tourism accommodation establishments has generally been increasing since 2013 (except in 2014, -0.04% and 2015, 0.05%). The number of accommodation establishments increased by 0.11% since 2013 (333 to 370 in 2017). There is disparity in regional distribution of accommodation capacities, thus 262 establishments were located in the Southern region, while a total of 108 establishments were located in the Northern and Central region in 2017. In 2015, there was a decrease in the number of accommodation establishments in the Southern and Northern region, after which all three regions were marked by a significant increase in the number of accommodation capacities in 2016 and 2017 (17.39% in the Central region in 2017).



Serbia

Type of accommodation	No. of objects	Capacity
hotels	***26	
tourist resorts	**1	500
Camps	0	
apartments/rooms - rural tourism	26	
households		
auxiliary beds		
TOTAL	53	*1518
* Categorised, official data		
** Hotel Izvor, Arandjelovac, Sumadija district - hotel resort		
*** other hotels		

Data from April 2018.

Slovenia

The structure of the accommodation capacity (2013) is as follows:

- 29 % Camps;
- 28 % Different accommodation facilities (mountain resorts, hostels etc.)
- 27 % Hotels
- 16 % Private rooms

Available data shows the following number of beds per accommodation in the region:

	2007	2008	2009	2010	2011
Hotel	1849	3080	3140	3168	3278
Pension	90				
Other (hostel, camping etc.)	4040	2705	2775	3910	3845
Private	325	3634	4024	5023	5055
TOTAL	6304	9419	9939	12101	12178

3.3. Analysis of arrivals and overnight stays

In the area of Zadar County in 2017, there were 1,800,000 arrivals, which is 11% more than in 2016 and 18% more overnight stays. Domestic tourists had 8% more arrivals and 36% more overnight stays, while foreign tourists had 12% more arrivals and 13% more overnight stays. Zadar County has realized almost 13.7 million overnight stays in 2017. The highest number of arrivals has been achieved in the area of Tourist board of Zadar, which is almost 30%, followed by the Tourist board of Biograd, Pag and Vir. Participation from 19 tourist associations in the overall number of arrivals was less than 2%.

In Albania, overnight were 172.248; while in Bosnia and Herzegovina 1.141.752. In Greece regions of DAE and ROE were 686.474 and 1.099.202 overnights. In Italy, which is more development in terms of tourism there were 3.020.136 overnights, in Montenegro 11,953,316. Serbia and Slovenia had less overnights, specifically, 220.004 (Serbia, which is still promoted as a tourist destination) and 606.548 (Slovenia - data is from 2011).

	Arrivals	Overnights	Year
Albania		172.248	
Bosnia-Herzegovina		1.141.752	
Croatia	1.800.000	9.188.096	2017
Greece (DAE)	242.179	686.474	2017
Greece (ROA)	457.581	1.099.202	2017
Italy	613.213	3.020.136	2017
Montenegro	2.000.002	11.953.316	2017
Serbia	103.722	220.004	2016
Slovenia		606.548	2011

3.4. Analysis of overnights and income (in EUR)

	Overnights	Income (in EUR)	Average spend %
Albania	172.248	620,090,00	
Bosnia-Herzegovina	1.141.752	3.000.000,00	
Croatia	9.188.096		64,61
Greece (DAE)	686.474	113.000.000,00	56
Greece (ROA)	1.099.202	216.000.000,00	59,4
Italy	3.020.136		
Montenegro	11,953,316	1.196.000,00	
Serbia	220.004		50
Slovenia	606.548		

Because of a lack of complete data, it was not possible to develop a comprehensive analysis for this category.

4. ANALYSIS OF SERVICES AND ATTRACTIONS RELATED TO CULTURAL AND NATURAL RESOURCES

This section provides analysis of different tourist services and attractions related to both cultural and natural resources, as well as integrated tourist services and products/attractions in each region with a specific focus on multisensory experience.

4.1. Relevant products and services related to cultural and natural resources (including integrated products/services)

Albania

The development of natural area tourism, which refers to tourists who want to explore and have an active experience is one of the main pillars of the Albanian Alps tourism development. The example of hiking trails from Thethi-Valbona, Valbona - Dragobi- Curraj I Epërm - Lekbibaj, that are an essence of nature-oriented tourism, also include cultural resources and sites, which makes these itineraries even more interesting.

The development of entertainment and recreational activities, hiking and alpinism, speleological and biking products and services, help keep this craze for Albanian Alps. However touristic products and services including the local history, handicraft, religious objects, traditional rural aspect, agro-tourism, local gastronomy and health care are valuable products that are a basis for more integrated tourism development in the next period.

Bosnia and Herzegovina

The development of tours is mainly related to already confirmed destinations of protected areas and individual nature monuments that are recognized as brand-destinations in the tourist market of Sarajevo's macro-region. These tours also include additional services related to the accommodation of tourists such as smaller eco-camps, tourist camps, tourist resorts (example Hadžići municipality) and newly built hotel facilities in the mountainous areas of Bjelasnica, Jahorina, Igman, Orman, etc.. Gastro resources of the Sarajevo macro-region are to a certain extent already branded and recognized in a wider tourist environment and represent one of the most important complementary tourist resources of the region. A similar observation can be

made for the exceptional potentials of rural tourism in this region, which for now has a very low rate of valorisation and use.

Croatia

In Croatia there are many exceptional products and services related to natural and cultural resources, from different events and festivals to outdoor sport and recreation offering in addition to more traditional sea and beach promotion. To mention only few most attractive ones:

Zadar Outdoor Festival - 3 days in the May combining sea, land and mountain activities become racing trails for participants from all over the world. There is a sailing regatta, swimming marathon, kayak race, cycling, running and trekking, but also numerous workshops, excursions, gastronomy, concerts.

Maškovića Han - Located in an inland of Dalmatia near NP Vransko Lake, this is a 17th-century mansion of a highly positioned admiral of the Sultan's army, built to be his summer residency. It contains all of the luxuries of typical Turkish architecture, (e.g. a mosque and a bath), and was recently renovated and repurposed to a heritage hotel, offering 4* accommodation, restaurant, gift-shop and a museum, together advertised with a slogan „Be a part of medieval story“.⁶

Zadar waterfront - “Sea organ” and “Greetings to the sun”, both experiments designed by Croatian architect Nikola Basic is located on the city of Zadar’s shore with the view of the Zadar channel, Ugljan and Pasma islands and the open sea. Sea organ is an architectural sound art object and an experimental musical instrument which plays music by way of sea waves and tubes located underneath a set of large marble steps (great experience of **sound**). Greeting to the Sun, right next to the Sea Organ creates playful game of lights activated by the sunlight saluting ‘the most beautiful sunset in the world’ (great experience of **sight**).

⁶ Source: <https://www.maskovicahan.hr/en>

Greece -the Regional Unit of Evia

The RU of Evia offers several tourism products and services, all of which are directly linked with its cultural and natural resources.

- **Authentic Sun & Beach:** A unique combination of feeling of the water and the sun. The proximity of the mountains offers the sensations of mountain nature mixed with the sea breeze and salt.
- **Family Sun & Beach:** The natural beauty of Evia's beaches, combined with the safety and tranquility of the water. Tourism infrastructure provide relaxing services for families as well as unique experiences friendly for children (i.e. horse riding).
- **Action Sea & Beach:** Kite surfing, diving, extreme sports and walking routes offer sensational experiences to adventurous visitors. You can feel, smell and hear the nature, as well as boost your body's adrenaline and experience the wild side of nature.
- **Wellness Sun & Sea:** A uniquely different experience for those who seek to combine traditional vacations with body, and mind, boosting wellness activities. Aidipsos Curative Springs, as well as other smaller ones around Evia, will offer a relaxing recreational feeling. Taste the water, listen to the running springs and feel the warm healing natural elements healing your body.
- **Nautical Tourism:** The variety of sceneries around Evia, offer unique opportunities for nautical tourism around Evia and Skiros. Unique viewing of Evia's cliffs, unique feelings of the sea breeze and unique audio experience of the song of the seas.
- **Wine Routes:** Evia's showcase for gastro-lovers. Unique tastes and aromas of wines accompanied with the experiences of wine-making and the process of creating a special product. All senses participate to the experience, creating a memorable moment for the wine aficionados but also for "regular" visitors.

Greece - the Region of Epirus

The region of Epirus offers different tourism products and services to mention the most attractive ones:

- **Sun & Sea** (Mainly in Thesprotia RU). This product can be implemented across the coastline of the region, that already enjoys seasonal popularity from visitors. The area

offers modern accommodation and services for visitors, mainly from inland Balkan countries. Several beaches have been awarded by the "Blue Flag" scheme for their quality of water and services.

- **Culture & Religion** (mainly in Ioannina RU). The city of Ioannina has a significant role in the history of culture, both in Greece and in the wider region. A plethora of tangible (i.e. Ioannina's Castle, Ancient Dodoni archaeological site) and intangible (i.e. festivals, poetry, art) cultural assets, elevate Ioannina to a regional cultural hub. The development of cultural tourism is favoured also due to the fact that it is not limited by the seasonality of external factors (i.e. sun). The destination is popular also during the winter months or during spring if the visitor wishes a more relaxing experience across the several natural heritage sites.

Italy

Italian region also offers different tourism products and services to mention the most attractive ones:

- **Ferrara Terra e Acqua** - Official web site of the Province of Ferrara. It promotes the tourism resources of the province of Ferrara, represented by the territorial tourism brand "Ferrara land and water": a union between Ferrara, capital of the Renaissance, and the two elements, land and water, which determine not only the physiognomy of the natural landscape (the plain between the Po river and the Adriatic Sea) but also the interaction between human activities and the environment, culture and culture traditions of this territory.
- **VisitFerrara Consortium/VisitComacchio Consortium** - Consortium of tour operators in the Province of Ferrara. The Consortium's mission is the promotion of a territory like the one in Ferrara able to satisfy the requests of any type of tourist, from the one interested in the art cities like Ferrara and Comacchio to the one that prefers the pristine nature of the Po Delta Park.
- **DeltaPoTourism Consortium** - The tour operators promote the territory of: the Po Delta, designated UNESCO WORLD HERITAGE SITE and MAB RESERVE. The companies operate in the Po Delta Park area, which extends along the Adriatic Riviera and includes

the main nature reserves of the provinces of Ravenna, Ferrara and Rovigo, which cover an area of over 100 km. The group combines hotel and non-hotel accommodation, restaurants, motor boats and small boats, as well as companies specializing in hospitality, guided tours and transport.

Montenegro

Montenegro region, also known as “the wild beauty” also offers different tourism products and services mostly based on the natural but also cultural resources

- **Sea, sun and active holidays** - as a combination of coastal tourism and visits to the rural areas of Montenegro;
- **Sea, sun and culture holidays** - as a combination of coastal tourism and city visits and/or visits to museums, monasteries etc.;
- **Activity based nature tourism** - biking, hiking, adventure, eco-travel in Montenegro are boosting its tourism;
- **Wine and gastro tourism** - rising interest of visitors in Montenegro for tasting local wines and food;
- **Culture and heritage tourism** - visits to historical sites and museums, cultural and thematic routes;
- **Events** - although most of events and festivals in Montenegro can still be regarded as an ad-on tourist attraction or activity, some of them have a strong multi-sensory stimulus

Serbia

The products and services that are being developed and are related to natural and cultural heritage are integrated offers in domain of **wine tourism** - creation of the regional wine tours. The similar developments are in domain of creating Sumadija **rakija tours** (local brandy made from plum). The tours imply visits of distilleries and wine cellars with tasting, and integrating other tourist attractions and cultural heritage along the routes.

Besides, in accordance with the growing trends of demand for active holidays, the region is working on promoting **hiking and cycling tours**. Ongoing is the process of mapping the most

attractive hiking and cycling routes that can be used by a wide range of visitors (not specialized for professionals or active sports persons). The tracks are mapped along the most attractive natural heritage and landscapes, also running near the cultural and historic heritage locations and objects.

Slovenia

Slovenian region also offers different tourism products and services to mention the most attractive ones:

- Active and sport tourism
- Business tourism
- Cultural tourism
- Eco- or green tourism
- Health tourism
- Rural tourism
- Water tourism
- Wine and gastronomy

4.2. Relevant tourist products and services

Albania	Bosnia-Herzegovina	Croatia	Greece	Italy	Montenegro	Serbia	Slovenia
<ul style="list-style-type: none"> • Hiking trails • Nature-oriented tourism: hiking and Alpinism, Speleology and biking 	<ul style="list-style-type: none"> • Outdoor/nature-based tourism (mountainous areas) • Rural tourism • Gastro tourism 	<ul style="list-style-type: none"> • "Sun & sea" • Culture/creative • Gastro/entertainment • Outdoor • Cycling • Rural/eco 	<ul style="list-style-type: none"> • Authentic Sun & Beach • Family Sun & Beach • Action Sea & Beach • Wellness Sun & Sea • Nautical Tourism • Wine Routes • Culture & Religion 	<ul style="list-style-type: none"> • Ferrara Terra e Acqua • VisitFerrara Consortium/VisitComacchio Consortium • DeltaPoTourism Consortium 	<ul style="list-style-type: none"> • Sea, sun and active holidays • Activity based nature tourism • Wine and gastro tourism • Culture and heritage tourism • Events 	<ul style="list-style-type: none"> • Wine tourism • <i>Rakija</i> tours (local brandy made from plum). • Hiking and cycling tours 	<ul style="list-style-type: none"> • Active and sport tourism • Business tourism • Cultural tourism • Eco- or green tourism • Health tourism • Rural tourism • Water tourism • Wine and gastronomy

4.3. Relevant tourist attractions

Albania

Shoshan Castle, Rosuja Town, Dragobia Cave, Bajram Currit Mill, Mic Sokoli's Tower, Koman's Old Cemeteries, Tamar Bridge over Cemi River are the most important cultural monuments that benefit also from the unique natural landscape. They attract many tourists every year.

The access improvement in the western part of the Alps includes not only improved access to previously isolated areas as Tamara, Lëpushë and Vermosh, that have unique natural and architectonic characteristics, but also a connection to the areas in Montenegro and other adjoining national parks.

Theth, Valbona, Curraj I Epërm, Dragobi, Vukël-Nikç are the main locations where architectonic values, ancestral traditions, cultural monuments, intertwine with natural scenery and beautiful mountain landscape. On the other hand, Sylbicw, Cerem, Kiri valley, Lepushë and Ragam are the locations that offer a unique natural scenery, between mountains, valley, glacial lakes, pasture etc.

Hiking/trekking are the most important activities in the region, attracting many tourists in the trails.

Bosnia and Herzegovina

Among them are especially distinguished: numerous caves, river canyons, waterfalls, bathing waterways and springs, endemic and red flora and fauna, specific types of natural habitats, etc. The most famous and most touristic caves are: Orlovaca (near Pale), Bijambara cave (as part of the protected landscape of Bijambare), Megara (in Hadzici) and similar. The canyon river valleys of this area are marked as extreme locations and are regionally and continentally recognizable: the Drina canyon with parts of the Piva and Tara canyons from the Scepan polje to the Visegrad hydro-accumulation, the Drina canyon downstream of the Visegrad hydroaccumulation, the canyon of the river Rakitnica from the village of Lukomir to the mouth

in the Neretva river and part of the Neretva canyon (belonging to Kalinovik municipality). Among the **waterfalls** are the most famous waterfalls Skakavac (which represents the nucleus of the protected area), the waterfall of the river Hrcavka, the waterfall Rakitnica and others that are mostly found in the upstream segments of river flows. In this area, numerous endemic species of flora, fauna and fungi are represented, which are recognized on the red list of flora, fauna and fungi of both BH entities.

Croatia

The sea is the main tourist resource of Zadar County and the quality of the 98% sea is excellent. Additional specific attractions are the following:

- **The nature park on Dugi otok** south side consist of a exceptional Telascica bay, the safest and biggest natural bay on the Adriatic coast offering more than 25 little beaches, followed by the rocks rising up to 161 meters above the sea and descending up to 90 meters into the sea and finally the salt lake with its healing power.
- **Traditional fiesta in Sali**, a village on the island, called *Saljske uzance* presents local traditional customs and offers a three days of fun.
- **The City of Biograd** with hundreds of islands in front of it and several national parks, along with modern marinas is an ideal starting point for many boaters. The whole archipelago is safe and attractive for sailing and is among the most attractive marine spots in the world.
- **Paklenica National Park** with distinctive canyons carved vertically into the south slopes of Velebit mountain range represents an adrenaline paradise of Zadar region. It also has a lavish underworld of caves in which dominates the cave 'Manita pec'. In this area, Winnetou movies by Karl May were filmed so its beauty can be experienced on a photo safari trips.
- **Skraping (*škraping*)** is a unique international trekking race on sharp islands rocks. It takes place on the Island of Pašman in March every year and its name comes from the term of sharp rocks. Open space orienteering, climbing, walking and adventure tourism are the main characteristics of this event.

- **St Donatus church** is the symbol of the city of Zadar with its unusual cylindrical shape with double interior space. Today it is the stage of musical evenings in St. Donatus due to its extraordinary acoustic characteristics.

Greece - the Regional Unit of Evia

Evia region includes many exceptional cultural and nature-based attractions:

- **Bike routes & walking routes in Kymi:** Recent development of these routes offers new opportunities for eco-friendly tourism and sports. The routes showcase the variety of activities available in Evia, which can be combined into unique touristic products for different groups of visitors. Some might choose mountain bike and some, the more relaxing walks in the forest or by the sea. A holistic experience is offered, which is highly stimulating for the senses.
- **Chalkida's Documentary Festival:** A cultural innovative event of significant impact, member of the platform "Europe for Festivals, Festivals for Europe". Although the festival is dedicated to "image", its cultural significance and international reach is pivotal for the overall cultural product of the region.
- **"Elymnia":** Annual Festival at the Limni of Evia. The cultural event takes place during 1 - 15 of August and includes audio-visual experiences combined with the waters of the lake and the participation of boats and volunteers. The event is by a highly sensual event, during which all senses participate. Lights, sounds, performing boats in the water and traditional smells from prepared food, all combined are creating a memorable experience for the visitors.
- **"Edipsos International Folk Dance Festival":** An annual event promoting Evia's traditions as well as the traditions of the participating countries. Based on movement and sound, the festival showcases the common traditions as well as those that differ in different countries.

Greece - the Region of Epirus

Epirus region also includes many exceptional cultural and nature-based attractions:

- **Zagorohoria:** Stone structures in a beautiful and rugged mountain setting make this area a must-see. Visit Mikro and Megalo Papingo, Aristi and Monodendri, which are among some of the best known.
- **Vikos-Aoos National Park:** The rare natural phenomena here will present you with unforgettable experiences as you walk the Vikos Gorge and the Aoos Canyon and contemplate the sheer heights of Mt Tymfi
- **Konitsa Bridge:** The Aoos and Voidomatis rivers meet at this famous bridge.
- **Syrrako & Kalarrytes:** Two beautiful old stone villages face each other like mirror images - destinations of exceptional beauty in Epirus.
- **Tzoumerka Waterfall:** Two liquid giants fall from 125m. Simply stunning.
- **Preveza:** Take a stroll on the lively esplanade of this port-town in Epirus, at the mouth of the Amvracian Gulf

Italy

Italian region includes the following cultural and nature-based attractions, to name just few:

- City of Ferrara (Historical centre, Castle, walls around the city, Cathedral, Museums)
- Delta Po Park
- City of Comacchio (Old Delta Museum, Historical centre, beaches)
- Comacchio valleys
- Ostellato valleys
- Buskes festival
- Baloon festival
- Internazionale festival
- Birdwatching fair
- Summer Pink Night
- Castle of Mesola
- Pomposa Abbay

All these attractions are part of the Unesco heritage and are reported in all the tourist promotion channels of the Ferrara area. The tourist development of this territory in all its

peculiarities is one of the starting points for the creation of tourist routes that combine natural, gastronomic and historical-cultural experiences.

Montenegro

Montenegro region includes the following cultural and nature-based attractions:

- **The Celebration of Mimosa** - takes place in Herceg Novi, Igalo, Baošići, Đenovići and Kumbor. It includes a fishing festival, masked balls, carnivals, literary evenings, exhibitions of paintings, flower exhibitions, mimosa picking, sports tournaments and visits to other towns.
- **Masked Balls and Carnivals** - takes place in Kotor, Tivat and Herceg Novi. Includes traditional festivals of Boka cuisine, musical concerts, theatrical performances and the final processions with the burning of the "carnival"
- **Budva Town Theatre** - an international summer arts festival with theatrical performances, concerts of classical music, ballet, choir evenings, book and poetry evenings, painting exhibitions;
- **"Bokeljska night"** - the traditional celebration of the "Boka Navy", including dancing, music performances and other cultural activities.

Serbia

Serbian region includes 5 top festivals and related attractions:

- **Wine festivals:** taste and smell of fruits and vine, traditional music, presentation of art and local traditions
- **Royal wine cellar** (Topola, Oplenac) includes guided tours through history and royal families premises
- **Music and folklore festivals** - these festivals include promotion of local traditional crafts products, handicraft, local food, honey, drinks. The events take place in the yards of vicinity of monasteries and include narrative and description of relevant historical events and facts
- Music festivals include presentation of other art exhibitions and local product
- Art colonies provide open door to visitors and sightseeing of other natural attractions and traditional customs

Top 5 most visited attractions are:

- **Monastery Manasija Despotovac** - medieval monastery and fortress (250,000)
- **Park of Bukovica Spa** (210,000, swimming pools 120,000)
- and the royal heritage resort in Oplenac
- **Topola** (85,600), Resavska cave (60,000)
- **Svilajnac Nature Center** (53,750)/ new and modern attraction, exhibition space of dinosaurs, pre historic heritage and homo sapiens models, volcanos.

Top 5 most visited events are:

- **Oplenac Vintage** (200,000)
- **Festival Just Out Despotovac** - medieval knights, international gatherings of knights with costumes, tents, swords, fights and medieval social games interesting for children (90,000)
- **Exhibition Marble and Sounds in Arandjelovac** - marble sculptures open air exhibition and music (35,000)
- **Arsenal fest Kragujevac** - rock music festival (30,000)
- **International Fair of Economy Paracin** (16,500).

Slovenia

Following events and cultural attractions are important for the development of the project aims. They provide unique experience and taste of the local tradition, culture, story, living culture of the area and all what is important for a good tourism product, means to deploy all five senses of the visitors.

	Nearby the CH sites	Nearby the CH/NC site *:
Festivals:	Vipavska Trgatev, The celebration of the cherries, Festival of roses, Vine Festival, mortadeljada, open wine cellars day, The polenta festival, Mohorjevo, The hay harvest festival, The peach festival, Chestnut festival, Martinovo festival, Pixelpoint, The municipal fest days, B'ndimska kvatrnica	Festival of Idrija Lace, Carneval without border -Gorizia, FAI Marathon - Gorizia, Border flavours
Concerts:	Tabor Musical evenings, Once upon a time there was a song, Rock Batuje, Many concerts on different places in the area	Regular (weekly/monthly concerts in Gorizia - Italy)
Fairs:	International exhibition of Christmas crib on Sveta Gora, Kriški fair day, Forester fair, Art market, Farmer market	Expomego - Gorizia, St. Anrew Fair, Christmas Fair (Main towns in surroundings)
Programs for children:	Several events (Nova Gorica Theater for children, New year events for children, other events,...)	Creativ lab for children (Gocce Colorate) - Gorizia italy, 1000 children in GYM - Gorizia Italy
Others:	The Soča rowing regata, May run, Rally of oldtimers in Vipava, Several Marches and other recreational events	Triatlon in Gorizia Italy, Piancavallo transborder champinship in ski, Gorizia marathon

4.4. Relevant attractions

Albania	Bosnia-Herzegovina	Croatia	Greece	Italy	Montenegro	Serbia	Slovenia
<ul style="list-style-type: none"> • Shoshan Castle • Rosuja Town • Dragobia Cave • Bajram Currit Mill • Mic Sokoli's Tower • Koman's Old Cemeteries • Tamar Bridge over Cemi River 	<ul style="list-style-type: none"> • Orlovača (near Pale) • Bijambara cave • the Drina canyon • waterfall Skakavac 	<ul style="list-style-type: none"> • The nature park on Dugi otok • Traditional fiesta in Sali • Paklenica National Park • Škrapiing - a unique trekking race on sharp island rocks • St Donatus church 	<ul style="list-style-type: none"> • Bike routs & walking routs in Kymi • Chalkida's Documentary Festival • "Elymnia" • "Edipsos" • Folk Dance Festival" • Zagorohoria • Vikos-Aoos National Park • Konitsa Bridge • Syrrako & Kalarrytes • Tzoumerka Waterfall • Preveza 	<ul style="list-style-type: none"> • City of Ferrara (Historical centre, Castle, walls around the city, Cathedral, Museums) • Delta Po Park • City of Comacchio (Old Delta Museum, Historical centre, beaches) • Comacchio; Ostellato valleys • Buskes; • Baloon festivals • Internazionale festival 	<ul style="list-style-type: none"> • The Celebration of Mimosa • Masked Balls and Carnivals • Budva Town Theatre • "Bokeljska night" • The Natural and Culture-Historical Region of Kotor • Durmitor National Park • National Park Biogradska Gora 	<ul style="list-style-type: none"> • Wine festivals • Music and folklore festivals • Monastery Manasija Despotovac - medieval monastery and fortress • Park of Bukovica • Spa royal heritage resort in Oplenac • Topola • Resavska cave 	<ul style="list-style-type: none"> • Vipavska Trgatev, • The celebration of the cherries, • Tabor Musical evenings, • International exhibition of Christmas crib on Sveta Gora, • Kriški fair day, • The Soča rowing regata

5. ANALYSIS OF MARKET AND COMPETITION

This section provides a brief analysis of the market and competition for each of the regions in the area of tourist products and services based on the natural and cultural resources.

5.1. Structure and types of visitors in the region

Albania

The actual tourists are mostly young people (25-45 years old) with university education, preferring the guest houses accommodation, staying between 2 to 3 days, and spending approximately 76 Euro per day. Their interest in nature, landscape quality, adventure and sports, lifestyle and hospitality are the main aspects that motivate them to come to the Alps.

Bosnia and Herzegovina

The tourist market of the Sarajevo macro-region is recognized by tourist visitors coming from a number of countries from the immediate surroundings of Bosnia and Herzegovina, but also from Europe and the world. More specifically, in the structure of international tourists, most arrivals are registered from a total of 25 countries from the region and the world.

Croatia

Most of the tourists coming to Zadar county are 26-35 years old (30.3%), followed by the groups 36 to 45 years old (25.7%) and 24.6% under the age of 25. Tourists are mostly highly educated with personal monthly income up to 1.000 EUR.

Greece - the Regional Unit of Evia

Mostly tourists from France, UK, Russia, Germany and Italy, April through September. Spending is averaging from 750EUR-1200EUR.

Profile	Seasonality	Activities	Accommodation	Market Segment	Categories of Tourists
France	Spend 1.000 € / travel 8.9 overnights Food & drinks	April - September	Nature cultural heritage eco-vacation	Not an important factor for destination selection	Families 35 - 64
USA	1.4 overnights Experiences and lifestyle entertainment	May & June	Sightseen Shopping	International Hotel Brands	Families 45-64
Germany	Spend 1.204 € / travel 11.9 overnights Relaxation & sightseen Demanding visitors	April-May September- October	Relaxation Swimming Sunbathing	Hotels	Families 35-64 Couples 25-34
Italy	Spend 742 € / travel 9.1 overnights Demanding on food quality and lifestyle	August March & April	Relaxation Sunbathing Natural exploring	Low cost accommodation	Families 25-44 Couples 25-44
Russia	Spend 1.368 € / travel 12.7 overnights Expect good weather	June - August	Relaxation Sunbathing Sightseeing Shopping	All inclusive	Families 25-64 Couples 25-64

Greece - the Region of Epirus

Research (by SETE, 2015) shows that visitors in the ROE prefer alternative tourism products, require year-around access via airlight as well as a variety of accommodation options.

Market	Visits (in thousands)	Expenditure per visit	Daily Expenditure	Length of Stay
Albania	203.1	164.6	103.0	1.6
Germany	75.1	565.3	51.2	11.0
UK	55.9	541.1	69.2	7.8
Italy	53.3	332.1	56.0	5.9

Italy

The available data regarding the type of tourist presences in the area are mainly linked to the origin. Unfortunately we do not have precise information on the age and type of travelers (couples, families, organized trips ...). As for tourism from abroad, the province of Ferrara is a destination chosen mainly by German visitors.

Montenegro

Summer visitors to the coastal region (2017)

- Age: 54% up to 35 years old 36.9% 36-55 years old, and 9.1% over 55 years old.
- 39.3% of tourists have university degree, followed by those with college of applied studies (43.6%) and secondary school education (16.3%).
- The origin of tourists: Russia 29.5%, Serbia 27.1%, Bosnia and Herzegovina / Croatia 10.7%, Ukraine / Belarus 7.9%, Montenegro 5.3%, etc.
- Swimming is the main activity during their stay at the Montenegrin coast. The following are the visits to restaurants (92.9%), shopping (85.1%), sightseeing / visiting museums / galleries / exhibitions (69.7%) and visiting local food / street / wine cellars.
- Average daily consumption per person is close to 78 EUR.

Summer visitors to rural areas (2018)

- Age: 54.1% up to 35 years old., 38.9% 36-55 years old, and 7% over 55 years old

- More than half of the visitors (60.7%) have university degree, while 25.3% of the tourists with a college of applied studies education.
- The largest number of tourists comes from Western European countries (37.4%), and the Western Balkans (31.1%), followed by those from Central and Eastern Europe (12%); a share of domestic tourists is 7.6%.
- Favourite activities - activities in nature, walking and nature stay, adventure, enjoying local food and drinks.

Serbia

According to the official statistics from 2016, number of tourists in Sumadija district 186.416; Pomoravlje 33.588. Of the total arrivals and overnight stays at the region level, about 66% were recorded by domestic guests, and approx. 34% of foreign visitors.

The total number of visitors in 2017, according to data of tourist organizations, is estimated at 900,000 annually, and to the events is 480,000 annually.

Slovenia

Data from 2013, shows the structure of origin of foreign guests in the region as follows:

- Italy (39,90 %),
- Germany (14,02 %),
- Austria (7,00 %),
- Czech (5,78 %),
- Nederland (3,53 %),
- Croatia (3,19 %),

The structure of the visitors is different in sub regions.

- Upper Posočje *: Slovenians (32,7 %), Germans (22 %), Austrians (7,7 %) and Italians (6,2 %);
- Idrijsko-Cerkljansko *: Slovenians (54,7 %), Croatians (10,3 %), Hungarians (8,4 %) and Nederland (5 %);

- Upper Vipavska valley: Slovenian (40,7 %), Italian (18,7 %), German (6,3 %) and Austrian (4,9 %);
- Nova Gorica: Italian (63,9 %), Slovenian (11,1 %), German (3 %) and Austrian (2,9 %).
- Hungary (2,65 %),
- France (2,81 %),
- UK - Great Britain (2,29 %).

5.2. Analysis of the selective types of tourism relevant for the region

Although predominantly still a “sun and sea” destination with beach tourism as the main attraction, the Adriatic area offers a variety of different types of tourism:

Types of tourism	Brief description
Rural tourism	<ul style="list-style-type: none"> with its corresponding specific forms such as traditional crafts, viticulture/eno-tourism and gastronomy, which present great opportunities for further development in all of the partner regions.
Cultural/creative tourism	<ul style="list-style-type: none"> cultural offer in all partner regions is very well developed, with both tangible (museums, galleries, historical sites) and intangible culture offering (manifestations, nonmaterial cultural offering such as traditional food, craft, music and dance).
Gastro tourism	<ul style="list-style-type: none"> an integral part of cultural tourism that can contribute to revitalization and the diversification of tourism and the promotion of local economic development.
Cyclotourism	<ul style="list-style-type: none"> a form of tourism that has seen a positive trend for many years. The partner regions provide an extremely comparative landscape advantages for the development of the cyclotourism.
Outdoor tourism	<ul style="list-style-type: none"> has seen a positive growing trend in the past few years especially in Albania Croatia, Bosnia and Herzegovina and Serbia with a range of outdoor sport and recreational activities that combine both natural and cultural resources. Those regions are however still lacking behind Slovenia and Italy in this type of tourism.
Skiing	<ul style="list-style-type: none"> Greece (ROE) has one ski resort with three different sites in Metsovo. Although it is one of the oldest resorts of its kind in Greece, it is not well developed.

5.3. Competition analysis

Albania

The main aspect appreciated by international and domestic tourists also demonstrates competitive advantages of the Albanian Alps: the quality of the natural landscape and sceneries; hospitality and ability to meet local population; natural and rural lifestyle; local products and gastronomy; hiking/trekking/walking in the nature and in the mountains. This competitive advantage puts Albanian Alps in a comfortable position towards the regional competitors. However, lack of various touristic services, promotion, collaboration with the neighboring states, environment and architectural protection, can also destabilize the sustainability of the tourism sector in the region.

Bosnia and Herzegovina

The tourist destination of the Sarajevo macro-region is also the leading and most attractive destination in Bosnia and Herzegovina with its attractive tourist resources and offering. The current concept applied in the tourism of Canton Sarajevo is the development of a complementary concept of tourism, which seeks to establish a cooperation with the most recent tourist markets in the region in order to refer tourists from these destinations to the tourist market of Sarajevo's macro-region. More specifically, it seeks to further promote rich natural and cultural-historical heritage as a complementary offering for one-day or multi-day tourist arrivals already in well-known destinations in the region (such as the entire Adriatic coast, protected areas in neighboring countries, large cities of the region etc.).

Greece - the Regional Unit of Evia

The following are competing tourist markets:

- Region of Thessalia has significant cultural and religious offering (i.e.) Meteora. Sporades Islands offer a great variety of Sea & Sun opportunities supported by tourism infrastructures and a strong brand name.
- Region of West Greece: Significant tourism infrastructure and cultural & religious sites. Significant natural environment that offers opportunities for relaxation and tranquility.
- Region of Peloponnese: Significant archaeological sites (Ancient Epidaurus, Ancient Corinth, Mycenae etc.) and natural resources. Several opportunities for mountain/nature tourism, gastronomical variety, alternative/ extreme sports. Sea & Sun tourism along the coastline of the region, supported by numerous tourism infrastructure (i.e. Accommodation, catering, transportation etc.)
- Turkey: Coastal regions of Turkey offer numerous Sea & Sun opportunities. Attractive City Brake destination (only in big cities). Less developed in terms of cultural & religious tourism.

Greece - the Region of Epirus

The following are competing tourist markets:

- Region of Sterea Ellada: The Region of Sterea Ellada has rich history and is easily accessible (although only via land) due to the proximity to Athens. The geomorphic variety of the region provides several opportunities for the development of alternative tourism as well as address the need of the Sun & Sea product.
- Region of Thessalia: The Region has a substantial cultural heritage inventory, which boosts the demand for cultural tourism. At the same time the Sporades Islands satisfy the visitors who seek Sun & Sea as well as those who seek a nautical experience. Finally, the region hosts the areas of Meteora and Mt. Olympus which respectively offer trips to history and access to ski resorts.

- Region of Western Greece: Western Greece has significant tourism infrastructure and hosts the international “brand names” of Delphi, Mikania and Olympia. The natural resources complete the iconic experience available for local and international visitors.
- Italy: The neighboring country (which has direct connection with Igumenitsa via sea) is a significant touristic destination. The country scores high in most of the touristic products (Sea & Sun, City Break, Culture & Religion, Nautical) but significantly underscores to the field of wellness and spa. Most of the advantages are due to a more coherent and strategic approach of the regional/local authorities that have developed respectively their touristic products.

Montenegro

Major competitors are those neighboring destinations that are not partners in the ADRION 5 Senses project, already offering multisensory experiences:

- Western Serbia region - developed tourism destination with broad tourist experiences encompassing nature-based activities, gastronomy and traditional and cultural events;
- South-Croatian coast / Dubrovnik region - internationally renowned destination, offering a plethora of tourist experiences, dominantly because of the city of Dubrovnik.

Slovenia

From the point of competition, it could be stressed that neighboring & bordering areas to Goriška region are Friuli Venezia Giulia on the west and the central Slovenia region on the east. On the south there is Coastal - Karst region and on the north Gorenjska region. Gorenjska region is known on ski tourism at the most, so there is not an immediate competition as Goriška region has not developed its tourism profile on this product apart from Bovec/Kanin, which is out of the ADRION 5 SENSES project area anyway. Competition with other two regions are potentially on the products like eno-gastronomy, sport and active holidays, pilgrimage, gambling and above all tourism based on cultural, natural and technical heritage as well as history.

6. RELEVANT STRATEGIES AND POLICIES RELATED TO THE PROTECTION, VALORISATION, INTERPRETATION, PROMOTION AND MANAGEMENT OF NATURAL AND CULTURAL RESOURCES

6.1. Strategies and policies

Albania	Bosnia-Herzegovina	Croatia	Greece	Italy	Montenegro	Serbia	Slovenia
<ul style="list-style-type: none"> • The General National Plan 2015-2030 • The Draft Strategy for Tourism Development 2017-2022 • The National Sectorial Tourism Plan For The Albanian Alps Region and the General Local plan of the municipality of Shkodra, Malësi e 		<ul style="list-style-type: none"> • Europe 2020, European strategy for smart, sustainable and inclusive growth, EC • The 2030 Agenda for Sustainable Development, EC • European Union - Tourism TrendsTourism Trends, UNWTO, 2017. • UNWTO Tourism Highlights, 2018 Edition • Travel Trends report 2018, Trekksoft 	<ul style="list-style-type: none"> • Tourism Marketing Plan of Region of Sterea Ellada 2015 - 2020 • Operation Programme (ESIF) of the Region of Epirus 		<ul style="list-style-type: none"> • Tourism and Hospitality Law. • the Law on National Parks; Spatial Plans for National Parks • The Strategy for Tourism Development in Montenegro by 2020 • The rural tourism development program with the action plan for 2019-2023 	<p>EU IPA funds, bilateral cooperation - government of Norway, Swiss government, South Moravian region, national funds - Ministry of trade, tourism and telecommunications, Ministry of agriculture, Ministry of environmental protection</p>	

<p>Madhe and Tropoja</p> <ul style="list-style-type: none"> • National Sectorial Tourism Plan For The Albanian Alps Region 		<ul style="list-style-type: none"> • Strategy for the development of tourism, Republic of Croatia 2020, Ministry of Tourism, April 2016. • Guide for volunturism, Innovations in sustainable tourism, 2017. EU project, Dubrovnik-neretva county, • Zadar county development strategy 2020, 2016. god. • Master plan for the development of tourism, Zadar county 2013.- 2023 					
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6.2. Possible sources of funding

6.2.1. EU funds

EU FUNDS that are used the most for these types of projects related to cultural and natural heritage are the following:

- Structural funds (ERDF, ESF) - cultural and natural revitalisation; infrastructural improvements, HR capacity building, cultural and thematic routes, biking routes and trails, thematic parks, tourist attractions, cultural offering, promotion, branding of the destination etc.
- INTERREG ADRION and MED - most common funds for cross border projects related to sustainable tourism, revitalisation of cultural and natural sites
- Creative Europe - for transnational projects that improve capacity and mobility of cultural workers and offering.

6.2.2. National/Regional/Local government sources

In Greece, funds are from the responsible ministries. Activities of regional significance, mainly in the fields of marketing and promotion, can be implemented by the Region of Sterea Ellada and more limited by the Municipalities. Both the Regional & Local authorities finance their limited activities by their regular budgets. During the Financial Multiannual Framework of the EU for 2014 - 2020, the Region of Sterea Ellada has budgeted approx. 13,5 million euro for cultural, natural and tourism development. These funds are on-top of any national (ministerial) funds budgeted for the Region of Sterea Ellada.

In Italy, The Emilia Romagna Region annually provides funding to local tourism bodies on the basis of the local promotion tourism programs presented. The individual Municipalities and local authorities also receive funding for the implementation of tourism activities through participation in European projects.

6.2.3. Private funding

Limited in Greece and when present is focused on cultural events and limited environmental activities via sponsorships. One source of income in all the regions come from the sales of tickets, souvenirs, from mainifestations, events etc.

6.2.4. Crowdfunding

Not popular in Greece, especially in the context of environment or cultural resources. In Croatia, not so commonly used but increasing in its recognition as a valuable source of funding.

7. GLOBAL TRENDS

The following international trends have been identified in this analysis, which could impact positively or negatively several regions.

- 1. Increase of sustainable tourism/fair tourism:** The movement offers opportunities for eco-friendly destinations that target younger audiences and invest strategically on sustainability. Might become a challenge for SMEs to adapt to the rising standards.
- 2. Growth of enabling technologies:** The constant technological progress provides more power to users but also raises their expectations for digital infrastructure. Destinations that are digi-savvy can take advantage of the global market but those who fail to adapt quickly might find themselves in difficult position soon.
- 3. Travel mobility:** The increase of air-travel can benefit remote destinations with good access to airports. Combined transportations (i.e. flight-train) can open up new routes for visitors. Internal transport networks that fall behind modernization can become serious liability.
- 4. Increase of Sharing Economy:** The Sharing Economy has created a new market to the tourism sector and a new segment of travelers. It is becoming an alternative for hotels and traditional accommodation, but also can support "hidden" destinations which do not have the traditional accommodation capacity (i.e. hotel). The wider impact on society varies (i.e. rise of rents, increase of neighborhood disturbances, increase disposable income etc.) as well as the impact on the offered quality. The Platform Business model is dominating the tourism sector and professionals as well as destination management authorities need to quickly adapt.
- 5. Increased preference for safe destinations:** The ongoing terror threats across popular destinations (i.e. London, Istanbul, Paris, Brussels etc.) created a new need for travelers to feel and be safe during their vacations. Destinations with low risk for terrorist attacks or with elevated security measures might benefit in the long term from increased arrivals.

CONCLUSION

All of the regions are rich in natural resources, from national to nature parks and protected areas. Some natural resources, like in the province of Ferrara are recognized as UNESCO and MAB UNESCO sites and are located in a territory where a "slow" type of tourism is developing to discover natural sites (e.g. hiking, birdwatching) while at the same time tourists enjoy cultural heritage and urban tourism, as well as other tourist offering (food, wine etc.). Those sites provide a multisensory experience (visual sight of natural beauties; sounds of nature; touch of rocks and water; echo of the caves, scents of plants and herbs...).

All the targeted destinations are also rich in cultural heritage (both tangible and intangible) including churches, monasteries, castles, forts, museums, historical centers and other tangible heritage sites. There are several renowned and UNESCO-recognized sites, as well as a variety of UNESCO-recognized intangible heritage like traditional singing and dancing, food and crafts.

In terms of tourism development, although there are similarities among the countries in terms of its resource potential and capacity for developing all - year long tourism, there are still clear differences and inequalities both in tourist quality and offering but also in services and workforce in hospitality and tourism.

All those destinations provide plenty of opportunities for active, nature-based tourism with different sport and recreation activities for all ages and target groups. However, due to a lack of resources, poor management and marketing, some destinations like those in Bosnia and Herzegovina and the region of Sumadija and Pomoravlje in Serbia are less valorized and promoted to broader visitors (in Serbia, the region although with a great potential for tourism development is mostly oriented towards agriculture and rural development). Those regions also lack sustainable management capacities but also a quality offering besides traditional food (*cevapi*) and wine or *rakija* (domestic plum brandy). Croatia, Montenegro and Albania are more developed in those terms, with Croatia and Montenegro gaining recognition in the Adriatic region as outdoor destinations. However, all three countries are still behind Slovenia and Italy where outdoor tourism is much more recognized and promoted to worldwide tourists.

While Croatia and Greece are recognized primarily as "sea and sun", meaning mostly summer season tourist destinations; Bosnia and Albania only have recreational and cultural tourism that

could extend their tourist season to most of the year. Most of the countries need to work more on integrating their cultural and natural resource-based offering and develop more active tourism - tourism based on the natural beauties and resources, especially Albania, Bosnia and Herzegovina and Croatia that are lacking in their offering behind Italy and Slovenia. There is also a need to expand tourism offering from "sun and sea" to hinterland, especially in Croatia where that type of offering is poor and mostly based on traditional food and wine without providing a strategic holistic experience in connecting natural and cultural resources.

Most selected types of tourism besides "sun and sea" (which could be divided into family, sport, wellness) include rural or eco-tourism with wine and even *rakija* tours becoming more popular (Serbia, Croatia); cultural and creative tourism (there are many frequented cultural routes in the region); gastro and eno tourism; cyclo-tourism (mostly related to road cycling but with mountain biking also gaining popularity) and outdoor tourism, meaning sport and recreation in the nature, which is seeing a fast growing positive trend (trail and trekking races; "shkraping" race on the island rocks; outdoor festivals). There are also other types of tourism that are becoming more popular like voluntourism, which brings tourists to less popular destinations like hinterlands and less visited islands). The Adriatic region is also known for nautical tourism.

All the regions have a variety of tourism offering from food and wine to festivals and other manifestations to national parks as branded products. Some destinations like Zadar in Croatia provide a branded tourism experience using nature-based resources (Sea organ and Greetings to the sun).

In terms of the structure of visitors it varies from region to region. Slovenia, Italy and Greece are visited mostly by foreign visitors with higher income and spending power (anywhere from 750 - 1200 EUR, while in Albania and Croatia, visitors spend around 75 EUR daily). In Croatia, tourists are mostly young people (25-45 years old) with university education, preferring the guest houses accommodation, staying between 2 to 3 days, with income of app. 1000 EUR per month. The tourist market of the Sarajevo macro-region is recognized by tourist visitors coming from a number of countries from the immediate surroundings of Bosnia and Herzegovina but also worldwide. In Greece, tourists are mostly from France, UK, Russia, Germany and Italy, April through September. In Montenegro, 54% of the tourist are up to 35 years old; 36.9% 36-55 years old, and 9.1% are over 55 years old. Furthermore, 39.3% of tourists have university degree, followed by those with college of applied studies (43.6%) and secondary school education (16.3%).

It was difficult to reach a conclusion in terms of accommodation and overnights and income (in EUR) as partners provided different or incomplete data. This is understandable especially in terms of accommodation capacities as each country has a different types of accommodation capacity, is registering visitors in a different way and for has a different legislation related to tourism. Some countries like Bosnia and Herzegovina are also missing data. A more comprehensive analysis will be provided in the later report pending on the existing data from other sources (UNWTO) or others.

Although not all partners provided answers to the questions related to funding sources and global trends, most of the regions have experience with EU funds and are mostly funded by national and/or regional sources of funding. Private sources are more limited while crowdfunding although recognized in countries like Greece and Croatia is rarely used for tourism-related projects.

In terms of global trends, there is a consensus among few partners that the trends are towards the following:

1. Increase of sustainable tourism/fair tourism
2. Growth of enabling technologies
3. Travel mobility
4. Increase of Sharing Economy and integration with local community (through activities such as voluntourism)
5. Increased preference for safe destinations

STAKEHOLDERS ANALYSIS

Summary from the Communication plan, Activity C1.

This section is presenting a list of key stakeholders in tourism that are most common for all regions including the following categories and sectors:

- Local Public Authorities
- Regional Public Authorities
- Sectoral Agencies
- Infrastructure and (public) Service Providers
- Interest Groups including NGOs
- Higher Education & Research
- Education / Training Centre and Schools
- SMEs
- Business Support Organizations
- General Public
- Enterprise, excluding SMEs

No	Stakeholder Category & Basic Characteristics	Interests and how Affected by ADRION 5 SENSES	Capacity and Motivation to Bring About Change	Possible Actions to Address Stakeholders Interests
Local Public Authorities				
	Tourist Boards <ul style="list-style-type: none"> Information centre Guide Organisation of public events Cities and municipalities Conservation offices <ul style="list-style-type: none"> Protection of heritage 	<ul style="list-style-type: none"> Direct contact with the tourist Awareness of the local situations and it's problems Enhancement of the touristic offer Direct contact with private accommodation offers Management of the city infrastructure 	<ul style="list-style-type: none"> Financial resources Local decision-making power Development of tourism at local level Adaptation of the national regulations 	<ul style="list-style-type: none"> <i>Raise awareness of the local population</i> <i>Communication between all stakeholders' groups</i> <i>Dissemination of information concerning the regulations and offers</i>
Regional Public Authorities				
	National tourist Boards and Councils Regional tourist Boards and Councils	<ul style="list-style-type: none"> Direct contact with the tourist Awareness of the local situations and it's problems Enhancement of the touristic offer Direct contact with private accommodation offers Management of the local infrastructure 	<ul style="list-style-type: none"> Distribution of the resources Development of tourism at local level Management of the local regulations and signalisation of the problematic situations 	<ul style="list-style-type: none"> <i>Raise awareness of the local population</i> <i>Communication between all stakeholders groups</i> <i>Dissemination of information concerning the regulations and offers</i>
National Public Authorities				
		<ul style="list-style-type: none"> <i>Develops national tourism development policies</i> 	<ul style="list-style-type: none"> <i>Political influence</i> <i>Decision-making power</i> <i>Financial resources</i> 	<ul style="list-style-type: none"> <i>Raise awareness through meetings, consultations</i>

<p><i>Relevant ministries that work on sustainable tourism, environmental protection, spatial planning and sustainable development</i></p> <ul style="list-style-type: none"> • <i>National Authority</i> • <i>Policy Maker</i> • <i>Funder</i> <p><i>Touristic Board of Croatia</i></p> <p><i>Croatian Chamber of Commerce</i></p>	<ul style="list-style-type: none"> • <i>Designs programs that include interventions in all fields of tourism</i> • <i>Develops the national touristic brand</i> • <i>Represents the country in International tourist events</i> 	<ul style="list-style-type: none"> • <i>Development of tourism at national level</i> • <i>Branding</i> 	<p><i>and involvement in events</i></p> <ul style="list-style-type: none"> • <i>Raise awareness in media</i> • <i>Presenting Strategies</i>
<p>Sectoral Agencies</p>			
<p>Partner organization</p> <ol style="list-style-type: none"> 1. Region of Epirus (Greece) - ROE 2. Development Agency of Evia SA (Greece) - DAE 3. SIPRO Development Agency - Ferrara (ITALY) - SIPRO 4. Zadar County Development Agency ZADRA NOVA (CROATIA) - ZADRA NOVA 5. RDA of Northern Primorska Ltd. Nova Gorica (SLOVENIJA) - RDANG 6. Sarajevo Economic Region Development Agency (SERBIA) - REDASP 7. Regional Agency for Economic Development of 	<ul style="list-style-type: none"> • <i>Development agencies</i> • <i>Contact with stakeholders</i> • <i>Implementation of the programmes</i> • <i>Integrating EU directives</i> 	<ul style="list-style-type: none"> • <i>Professional team</i> • <i>Awareness of the local touristic problems</i> • <i>Awareness of the new strategies and new tourism trends</i> 	<ul style="list-style-type: none"> • <i>Raise awareness</i> • <i>Implementation</i> • <i>Branding and Demonstrating</i>

	Sumadija and Pomoravlje (BOSNIA AND HERZEGOVINA) - SERDA 8. Albanian Development Fund (ALBANIA) - ADF 9. National Tourism Organisation of Montenegro (MONTENGRO) - NTOCG			
Infrastructure and (public) Service Providers				
Interest Groups including NGOs				
Higher Education & Research				
	Public universities; Private universities; Business management schools Tourism schools and faculties	<ul style="list-style-type: none"> • Education • Insemination 	<ul style="list-style-type: none"> • Professional staff • Infrastructure Capacity • Capacity to follow new trends and strategies 	<ul style="list-style-type: none"> • <i>Raising awareness for the professionals, educational structure and students</i> • <i>Promoting results</i> • <i>Demonstrating</i>
Education / Training Centre and Schools				
	Hotel management, Tourism and Gastronomy schools; Public open schools	<ul style="list-style-type: none"> • Education • Insemination 	<ul style="list-style-type: none"> • Professional staff • Infrastructure Capacity • Capacity to follow new trends and strategies 	<ul style="list-style-type: none"> • <i>Raising awareness for the professionals, educational structure and students</i> • <i>Promoting results</i> • <i>Demonstrating</i>
SMEs				
7.	<ul style="list-style-type: none"> • ICT Sector 	<ul style="list-style-type: none"> • Business Contracts 	<ul style="list-style-type: none"> • High level of awareness 	<ul style="list-style-type: none"> • <i>Raising awareness</i>

	<ul style="list-style-type: none"> • Food supplies SME's • Local traditional production • Divers tourist Agencies 	<ul style="list-style-type: none"> • <i>Designs programs that include amelioration in all fields of tourism</i> • Follow the new trends and demands and adapt the offer 	<ul style="list-style-type: none"> • Rapid adaptation and modification of the offer • Direct contact and established network 	<ul style="list-style-type: none"> • <i>Branding the new products</i> • <i>Local meetings and consultations</i>
Business Support Organisations				
General Public				
8.	<ul style="list-style-type: none"> • Associations • Private accommodation owners 	<ul style="list-style-type: none"> • Represents the local stakeholders • Regular improvements of the rental properties 	<ul style="list-style-type: none"> • Principal financial resource • Long tradition of property management • Ambassadors of tradition 	<ul style="list-style-type: none"> • <i>Direct contact with target groups</i> • <i>Dissemination to a large number of Stakeholders</i>
Enterprise, excluding SMEs				
	<ul style="list-style-type: none"> • Constructer enterprises • Food processing enterprises 	<ul style="list-style-type: none"> • Business offers increased • Number of employees increased • Stabilization of the Season 	<ul style="list-style-type: none"> • Quality products • Amelioration of the commercial offer • Adaptation to a market demand 	<ul style="list-style-type: none"> • <i>Raising awareness through meetings, education</i> • <i>Quality management</i>

SWOT ANALYSIS (strengths, weaknesses, opportunities and threats analysis)⁷

SWOT analysis (strengths, weaknesses, opportunities and threats analysis) is a framework for identifying and analyzing the internal and external factors that can have an impact on the viability of a project, product, place or person.

Elements of a SWOT analysis

As its name states, a SWOT analysis examines four elements:

Strengths: Internal attributes and resources that support a successful outcome.

Weaknesses: Internal attributes and resources that work against a successful outcome.

Opportunities: External factors that the entity can capitalize on or use to its advantage.

Threats: External factors that could jeopardize the entity's success.

A SWOT matrix is often used to organize items identified under each of these four elements. A SWOT matrix is usually a square divided into four quadrants, with each quadrant representing one of the specific elements. Decision-makers identify and list specific strengths in the first quadrant, weaknesses in the next, then opportunities and, lastly, threats.

How to do a SWOT analysis?

A SWOT analysis generally requires decision-makers to first specify the objective they hope to achieve for the business, organization, initiative or individual. From there, the decision-makers list the strengths and weaknesses as well as opportunities and threats.

Various tools exist to guide decision-makers through the process, often using a series of questions under each of the four elements. For example, decision-makers may be guided through questions such as "What do you do better than anyone else?" and "What advantages do you have?" to identify strengths; they may be asked "Where do you need improvement?" to identify weaknesses. Similarly, they'd run through questions such as "What market trends could increase sales?" and "Where do your competitors have market advantages?" to identify opportunities and threats.

The following SWOT analysis was developed based on the regional SWOT analysis prepared by each partner and includes key joint strengths, weaknesses, opportunities and threats for the ADRION region as a whole.

⁷ <https://searchcio.techtarget.com/definition/SWOT-analysis-strengths-weaknesses-opportunities-and-threats-analysis>

SWOT ANALYSIS

<p>INTERNAL</p>	<p>Strengths</p> <ul style="list-style-type: none"> ▪ Rich cultural and historical heritage ▪ Abundance of natural resources (landscapes, caves, protected areas) ▪ Some of the 'must see' locations ▪ Recognizable manifestations ▪ Diverse tourist offers ▪ Many products just need fine tuning to become fully sensory ones ▪ Developed geodiversity and biodiversity of the region ▪ Mediterranean climate ▪ Developed road transport infrastructure ▪ Established various programs for permanent education and adult education in tourism ▪ Well known outdoor activities such as hiking, running, trekking, biking etc. 	<p>Opportunities</p> <ul style="list-style-type: none"> ▪ Opportunities and basis for developing more coordinated management ▪ Positive trends in tourism ▪ Use of digital tools - there is a solid basis but needs to be further developed and capitalized its full potential ▪ Knowledge and potential of NGOs especially those in tourism ▪ Improving the quality and content of services ▪ Donor programs (EU funds) ▪ New market opportunities ▪ Saturation with traditional destinations - need for innovations and new offer ▪ Linking with neighboring destinations through thematization ▪ Most commonly used „elements“ of holistic, multisensory tourist products/services in this region are food and wine (and gastro-eno tourism) - there are opportunities for other elements and senses (Music, dance, digital interpretation of 	<p>EXTERNAL</p>

	<ul style="list-style-type: none"> ▪ Tourism products are well developed and branded (both cultural and nature-based tourism products) - not necessarily multisensory products ▪ Capacity level of key stakeholders in developing more innovative and integrated tourism products/services in the region is at the medium level ▪ Capacity level of key stakeholders in promoting and creating visibility of tourism products/services in the region is at the medium level ▪ Cooperation is also at the medium level - the highest level of cooperation is at the local level ▪ Stakeholders knowledge about a sensory marketing approach is fairly low - the most common approach is "it just happens" 	<p>legends and stories, tangible and intangible heritage, natural phenomena etc.)</p> <ul style="list-style-type: none"> ▪ Development of road infrastructure connecting south and north of the country ▪ Cooperation and support of UNESCO sites in the neighboring regions... ▪ Local traditional products as tourism product in increasing numbers ▪ Support measures for better marketing of traditional products training, joint activities ▪ Transnational network provides an opportunity for more cooperation and establishing greater links to potential customers/buyers ▪ To increase understanding and application of the sensory marketing approach stakeholders from different sectors need to be connected to co-create innovative tourism products 	
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	Weaknesses	Threats	
	<ul style="list-style-type: none"> • Too much focus on visual and taste and not on other senses • Lack of awareness of integrated 5 senses in the tourism offering • Lack of sensory marketing • No cooperation between the involved stakeholders • No synergy between the various tourist proposals • Bad road and other infrastructure in mountainous areas with extraordinary natural attractions (in some regions) • Lack of initiatives for the development of sensory products and networking at the local level • Not enough reliable data for performance management • Lack of organized tourism transport lines • Lack of energy and water management structures in some areas 	<ul style="list-style-type: none"> ▪ Competition between neighboring countries ▪ Focus is still mostly on mass tourism as a main offer ▪ Tourism not recognized as an economic sector ▪ Declarative support to tourism by governments ▪ Political instability in the region ▪ Low ecological awareness of citizens - threats to the environment ▪ Limited budget capacity of local and regional authorities and private investment capacities • Lack of measures and support to tourism SMEs and other stakeholders in tourism from the national and regional/local government • Continuing migration of young people to urban areas • Bad Urban waste management, environmental or fauna and flora protection. • Lack of coordinated investments respecting the local architecture, environment and landscape etc. 	

	<ul style="list-style-type: none"> • Absence of joint management of heritage sites for tourism purpose... • Lack of adequate communication between local and regional authorities in terms of joint tourism performance • Lack of adequate communication between local tourism stakeholders in terms of joint tourism performance • Absence of joint and coordinated marketing 	<ul style="list-style-type: none"> • Strict regulations and laws that prevent innovation • Introduction of new, modern and non-sustainable materials and solutions in renovation of techniques and construction in relation to the heritage sites • Commercialization of the local traditions 	
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VISION FOR THE ADRION REGION

(Based on the discussion with project partners and the final agreement at the meeting in Ferrara on April 17, 2019.)

By 2025, ADRION Region will become a destination of 4 seasons with clearly profiled products based on rich cultural and natural heritage that deliver memorable, extraordinary experiences and stimulate all five senses.

Cooperation within and among regional partners through transnational networks will create not only a system of immersive holistic experiences, but also will ensure joint sustainable management and sensory marketing with a clear added value for economic growth and new job opportunities in the ADRION region.

The region's vision is in line with the overall vision and common values of the ADRION 5 Senses project.

STRATEGIC GOALS AND MEASURES

This section includes a strategic framework composed of a set of strategic goals, measures and proposed activities that were further developed in the Joint Action Plan. The framework was developed based on the active involvement and input from all project partners.

1. STRATEGIC GOAL 1.

To support capacity building efforts to key stakeholders and service providers in multisensory product planning, development and management.

According to the initial research conducted among the partners and key stakeholders, one of the main challenges is a lack of understanding and capacity of tourism stakeholders in creating integrated, multisensory experience in the destination. Main focus will be thus to increase capacity and knowledge about good practices in other destinations; methodologies in creating a multisensory experience, as well as ensuring continues education in different practices and methodologies such as storytelling, living history approach etc. This will be done through measures that will include organizations of various workshops, seminars and other capacity building programmes as well as by developing a Guide for multisensory tourism development and promotion as a joint Guide with standardized specifications, criteria and indicators for tourism product assessment and further development.

Measures:

1.1. Organize joint activities on multisensory product development, branding, management and marketing/promotion

These activities will be planned by the joint working group based on the assessment of needs and priorities. Since there is already an initial Benchmark Analysis there is a need to first of all develop a more comprehensive Standard specifications for assessment of the existing and creation of new tourist offer based on five senses, which will be based on the initial Benchmark Analysis prepared within the Adrion 5 Senses project. There will be also a set of workshops and seminars conducted by European and international experts on multisensory product development, branding and marketing/promotion. Since some of the key stakeholders in the Adrion region include universities that have already expressed an interest in developing a new

curricula based on the multisensory product assessment and development, one of the activities may also include the development of a joint curricula that will be available for the use and implementation at various universities and schools in the Adrion region. This curricula could be offered online.

Proposed activities:

- 1.1.1. Organize working groups of different stakeholders to work on the product planning, development and sustainable management
- 1.1.2. Develop Standard specifications for assessment of the existing and creation of new tourist offers based on five senses (based on the Benchmark Analysis)
- 1.1.3. Develop a new curriculum for training programmes based on the Guides
- 1.1.4. Implement the programme

1.2. Mapping of international stakeholders and partners

Although there was an initial mapping of key stakeholders conducted in partner regions, there is a need for more comprehensive mapping that will be done at the level of the Adrion region. This map of stakeholders will first of all serve as a basis for cooperation and exchange of experiences but also as a basis for the establishment of transnational networks. It will also be useful for many proposed activities especially within the Strategic goal 1. Capacity building efforts as it will enable additional cooperation on the establishment of the curricula, and the organization of capacity building workshops and seminars.

Proposed activities:

- 1.2.1. Define mapping methodology & criteria
- 1.2.2. Identify based on the criteria
- 1.2.3. Maintain the database

1.3. Create a transnational network and support cooperation in the Adrion region

One of the aims of the Adrion 5 Senses project is to establish a transnational network but also provide a continuous support in the Adrion region. The Transnational Network will be composed of local/regional/national/international stakeholders (mapped through the previous Measure 1.2.), to ensure effective consultation (bottom-up/top-down) and consensus during the project implementation and beyond. There will be also a planning activity to ensure effective

governance and sustainability of the Network as well as an active participation of its members. As one of the joint activities, there will be a joint conference for all interested Adrion stakeholders to showcase the Standard specifications and the multisensory approach to tourist product assessment and development.

Proposed activities:

- 1.3.1. Create terms of participation, goals and governance of the network
- 1.3.2. Establishment of the network
- 1.3.3. Organize joint opening conference for Adrion stakeholders

2. STRATEGIC GOAL 2.

To develop innovative, holistic, multisensory tourism products based on cultural and natural heritage.

The overall goal of the ADRION 5 SENSES project and this Strategic and Action plan is to develop innovative, holistic and multisensory tourist destination. This can be done by developing carefully selected tourist products and services that can be developed or upgraded to include more than one or two senses as it is a case right now. There are many cases in tourism of the region that are already using more than one or two senses but could be further upgraded. It is important to emphasize that a multisensory destination can only be built if there are quality tourist products, services and experience provided to tourist. Also, if there is a proper management and marketing plan in place to implement those activities and continuously advance the In order to do that this Plan is proposing a set of the following measures:

Measures:

2.1. Develop and ensure maintenance of the database of multisensory tourism offer in the ADRION region.

To be able to assess the current situation and create new opportunities it is necessary to develop a map of different tourism products, attractions, services etc. (sort of a repository) and assess them from the perspective of multisensory planning, management and marketing. For that it is useful to use the proposed Good Practices Guide with a set of proposed indicators, as well as the Benchmarking Analysis. Map could be presented in a different, attractive ways on relevant web and social media sites. In this measure, use more IT tools to create and promote multisensory tourism.

Proposed activities:

- 2.1.1. Mapping of multisensory products in the region (joint products, geographical certification of products)
- 2.1.2. Develop Adrion tourist web site and mobile app
- 2.1.3. Promotion of web site and app - Trainings for tourist operators

2.2. Upgrade the Existing and develop New multisensory tourist offer.

Based on the Standard specifications but also other capacity building activities, Adrion stakeholders will be able to upgrade the existing and develop new multisensory tourist offer with the aim to create greater visibility of the Adrion region especially those regions that are not yet recognized as tourist destinations like Serbia.

Proposed activities:

- 2.2.1. Develop a plan of action for developing new products
- 2.2.2. Design and conduct workshops for new product development (capacity building)
- 2.2.3. Implementation of new multisensory tours and experiences

3. STRATEGIC GOAL 3.

To create a regional ADRION brand and implement innovative marketing approaches to ensure visibility of the region.

Research within the ADRION 5 SENSES has shown that sensory marketing as a concept is not that well known and used in practice. It is thus necessary to improve knowledge of the importance and know how on sensory marketing with a goal to improve the current tourist offering.

Measures:

3.1. Development of the Joint Marketing strategy and Communication plan

The first step is to develop an integrated sensory marketing and communication plan that would help in implementing and promoting this strategy to the right target groups of tourists with the most outcomes.

Proposed activities:

- 3.1.1. Prepare public procurement for external experts
- 3.1.2. Research activities - situation analysis

3.2. Support the development of the destination management model and ownership of the ADRION brand

This measure is important for the sustainability and promotion of the Adrion brand. As in any other destination, the key is to ensure a sound and continuous development and a promotion of a certain brand. In order to achieve this, there should be a joint strategic decision on the destination management model, usually a company or an organization that will take on all the tasks related to the creation and promotion of a joint tourist offer. This DMC or DMO will be also in touch with all key stakeholders and will follow the international trends and market competition to be able to compete with both qualities offers and prices to attract more returning visitors. This model will be developed jointly through the project but also based on the input from the joint working group/steering committee.

Proposed activities:

- 3.2.1. Marketing materials settings for the ADRION brand or a group of the ADRION brand
- 3.2.2. Setting up a practical guide on how to use the ADRION Brand
- 3.2.3. Workshops to address key stakeholders on the ADRION brand management model

3.3. Ensure promotion and visibility of the destination and the ADRION brand

Following the definition of new tourist and sensory routes and identifying all the stakeholders involved, the objective will be the consolidation of new marketing initiatives for the promotion. The study of new SEO strategies to improve the presence on search engines and for the use of social media.

Proposed activities:

- 3.3.1. Development of the social media plan and Visual media plan
- 3.3.2. Organization of promotional international activities, study visit, conference, workshop, etc.
- 3.3.3. Participation to external events (fairs, other events)

4. STRATEGIC GOAL 4.

To develop relevant infrastructure for sustainable tourism.

The last but not the least important goal is the establishment of relevant tourist infrastructure including multisensory information centers but also ICT infrastructure that will ensure the visibility of the tourist offering and help promote the targeted region as a multisensory destination.

Measures:

4.1. Support the development of ICT and other infrastructure means to promote ADRION destination

In cooperation with all relevant stakeholders, design and develop a multilingual, interactive web platform to promote multisensory products and the destination as a whole. It will also serve as a tool to promote the transnational network and to present the map of senses for the region.

Proposed activities:

4.1.1. Create a joint web platform

4.1.2. Set up a map of senses

4.2. Promote accessibility to ADRION destinations

One of the most important segments of the destination is in its accessibility, which can be both related to roads and infrastructure but also in information accessibility or accessibility for people with disabilities. In order to assess its current accessibility, it is important to develop a Guideline for accessibility assessment and upgrade but also train relevant stakeholders on what to pay attention in their destinations and how to ensure more accessibility for different groups of visitors.

Proposed activities:

4.2.1. Develop a Guideline for accessibility assessment and upgrade

4.2.2. Workshop on the presentation of the accessibility Guideline

4.3. Ensure environmentally sound infrastructure development and awareness raising.

In addition to its accessibility, each destination needs to have an Environmentally sound infrastructure development and awareness raising activities such as a “leave no trace and no-plastic” campaigns. This measure will include the following proposed activities that will be further defined through the joint work of the working group and in the process of developing an Environmental sustainability plan.

Proposed activities:

4.3.1 Develop an Environmental sustainability plan

4.3.2 Actions for the stakeholders/ relevant actors for environment sustainability

4.3.3. Insurance involvement

JOINT ACTION PLAN FOR THE ADRION REGION

Strategic goal 1. To support capacity building efforts to key stakeholders and service providers in multisensory product planning, development and management.

Measure 1.1. Organize joint capacity activities on multisensory product planning, development and sustainable management

Activity #	Priority level (1-3)	Time-frame	Lead partner/ other key partners	Expenses	Funding sources	Indicators (for a set of indicators, also use the Good practices guide)
1.1.1. Organise working groups of different stakeholders to work on the product planning, development and sustainable management	1	Q1-2 Year 1 - to be established Ongoing operation	Local/Regional / National Development Agency	5.000 € / working group	Local/regional/ national/ EU funds	# of working group members # of working group meetings
1.1.2. Develop Standard specifications for assessment of the existing and creation of new tourist offer based on five senses (based on the Benchmark Analysis)	1	Q2 - Q3 - Year 1	Product working group of Activity 1.1.1. (coordinated by the local/ regional / national development agency)	10.000 per region	Local/regional/ national/ EU funds	# Guide for multisensory tourism development and promotion per product category/region
1.1.3. Develop a new curricula for training programmes based on the Guides	1	Q3 - Q4 - Year 1 Q1 - Year 2	Capacity building Working group (coordinated by the local/ regional / national development agency) + External experts	15.000 per curricula	Local/regional/ national/ EU funds	# Curricula developed

1.1.4. Implement the programme	1	Q2 - Year 2 ongoing	local/ regional development / national agency + External experts	5.000 per course	Local/regional/ national/ EU funds	# annual training programme # of trainees
<p>Strategic goal 1. To support capacity building efforts to key stakeholders and service providers in multisensory product planning, development and management.</p> <p>Measure 1.2. Mapping of transnational stakeholders and partners</p>						
1.2.1. Define mapping methodology & criteria	1	Q1 - Year 1	Academic / Scientific partner / External Expert	3.500 €	Local/regional/ national/ EU funds	# of methodologies
1.2.2. Identify based on the criteria	1	Q2-Q3 - Year 1	Local / Regional / National Development Agency	3.000 € / region	Local/regional/ national/ EU funds	# of identified stakeholders and partners
1.2.3. Maintain the database	1	Q3 - Year 1 - onwards	Local / Regional / National Development Agency	3.000 € / region	Local/regional/ national/ EU funds	# of identified stakeholders and partners (updates)
<p>Strategic goal 1. To support capacity building efforts to key stakeholders and service providers in multisensory product planning, development and management.</p> <p>Measure 1.3. Organize study visits and exchanges for key stakeholders</p>						
<p>Strategic goal 1. To support capacity building efforts to key stakeholders and service providers in multisensory product planning, development and management</p> <p>Measure 1.3. Create a transnational network and support cooperation in the Adrion region.</p>						
1.3.1. Create terms of participation, goals and governance of the network	1	Q2 - Year 2	Local/Regional / National Development Agency	3.500 €	Local/regional/ national/ EU funds	# of rulebooks

1.3.2. Establishment of the network	1	Q3 - Q4 - Year 2	Local/Regional / National Development Agency	10.000 €	Local/regional/ national/ EU funds	# of preparatory meeting # of participating organisations / institutions
1.3.3. Organise joint opening conference for Adrion stakeholders	1	Q4 - Year 2	Local/Regional / National Development Agency	25.000 € (includes travel & organization)	Local/regional/ national/ EU funds	#participants #new joint activities
Strategic goal 2. To develop innovative, holistic, multisensory tourism destination based on cultural and natural heritage.						
Measure 2.1. Develop and ensure maintainance of the database of multisensory tourism offer in the ADRION region.						
Activity #	Priority level (1-3)	Time-frame	Lead partner/ other key partners	Expenses	Funding sources	Indicators (for a set of indicators, also use the Good practices guide)
2.1.1. Mapping of multisensory products in the region (joint products, geographical certification of products)	1	4 months	LP with the support of all PPs	100.000 euros	European and regional funds	Number of mapped multisensory products divided in 5 senses. Number of developed tools Number of certificated products
2.1.2. Develop Adrion tourist web site and mobile app	1	6 months	LP with the support of all PPs	40.000 euros	European and regional funds	SEO position, accessibility of the app

2.1.3. Promotion of web site and app - Trainings for tourist operators	1	2 years	All PPs	40.000 euros	European and regional funds	Number of access to web site and the number of downloads of the app. Tourist operators trained
Strategic goal 2. To develop innovative, holistic, multisensory tourism products based on cultural and natural heritage.						
Measure 2.2. Upgrade the Existing and develop New multisensory tourist offer.						
2.2.1. Develop a plan of action for developing new products	1	6 months	LP with the support of all PPs	80.000 euros	European and regional funds	#plan of action
2.2.2. Design and conduct workshops for new product development (capacity building)	2	1 year	LP with the support of all PPs	50.000 euros	European and regional funds	#of workshops #of participants
2.2.3. Implementation of new multisensory tours and experiences.	1	1 year	LP with the support of all PPs	200.000 euros	European and regional funds	#of new or improved products #of visitors
Strategic goal 3. To create a regional ADRION brand and implement innovative marketing approaches to ensure visibility of the region.						
Measure 3.1. Development of the Joint Marketing strategy and Communication plan						
3.1.1. Prepare public procurement for external experts	1	Two months	All PP	n.a.	n.a.	n.a.
3.1.2. Research activities - situation analysis	2	Three months	All PP	10.000-20.000	n.a.	#participants #focus groups #survey participants

						#number of participants #data available (report, strategies, survey, etc.)
3.1.3. Strategic Marketing and communication plan development	1	Two months	All PP	10.000-20.000	n.a.	#marketing and communication plan #number of audience #data available
Strategic goal 3. To create a regional ADRION brand and implement innovative marketing approaches to ensure visibility of the region.						
Measure 3.2. Support the development of the destination management model and ownership of the ADRION brand						
3.2.1. Marketing materials settings for the ADRION brand of group of the ADRION brand	1	Two months	All PP	15.000-20.000	n.a.	#number of marketing materials
3.2.2. Setting up a practical guide on how to use the ADRION Brand	1	Two months	All PP	3.000-5.000	n.a.	#number of marketing materials
3.2.3. Workshops to address key stakeholders on the ADRION brand management model	3	One month	All PP	5.000	n.a.	#number of participants #number of workshops
Strategic goal 3. To create a regional ADRION brand and implement innovative marketing approaches to ensure visibility of the region.						
Measure 3.3. Ensure promotion and visibility of the destination and the ADRION brand						

3.3.1. Development of the social media plan and Visual media plan	1	One month	All PP	10.000-20.000	n.a.	#number of social media #number of users #number of social media tools
3.3.2. Organization of promotional international activities, study visit, conference, workshop, etc.	2	Five months	All PP	20.000-40.000	n.a.	#number of activities #number of study visits #number of workshops
3.3.3. Participation to external events (fairs, other events)	2	One years	All PP	20.000-40.000	n.a.	#number of fairs #number of events
Strategic goal 4. To develop relevant infrastructure for sustainable tourism.						
Measure 4.1. Support the development of ICT and other infrastructure means to promote ADRION destination						
4.1.1. Create a joint web platform	1	Three months	All PP - the more Expert of ICT	5.000-10.000	n.a.	#number of pages #number of web users
4.1.2. Set up a map of senses	2	Five months	All PP	5.000-10.000	n.a.	#number of participants #data available on the map
Strategic goal 4. To develop relevant infrastructure for sustainable tourism.						
Measure 4.2. Promote accessibility to ADRION destinations						
4.2.1. Develop a Guideline for accessibility assessment and upgrade	1	Three months	All PP	10.000-15.000	n.a.	#number of accessible place #users

4.2.2. Workshop on the presentation of the accessibility Guideline	2	Four-five months	All PP	5.000-10.000	n.a.	#number of participants #number of events
Strategic goal 4. To develop relevant infrastructure for sustainable tourism.						
Measure 4.3. Ensure environmentally sound infrastructure development						
4.3.1 Develop an Environmental sustainability plan	2	3 months	All PP	10.000-15.000	n.a.	#number of environmentally sustainable places #users of the plan
4.3.2 Actions for the stakeholders/ relevant actors for environment sustainability insurance involvement	2	1 years	All PP	10.000-15.000	n.a.	#stakeholders #actions

EVALUATION AND MONITORING

In terms of monitoring and the evaluation, there will be a Monitoring and evaluation committee composed of different stakeholders from regional partners - a total of 9 members.

The Committee will meet semi-annually as well as periodically, as needed to evaluate the Action plan and the implemented activities.

Members will rotate every two years to include other experts from the tourism, IT, business, culture and other sectors.

The operation of the Committee will be developed in a separate document.