

Report on Sustainable Tourism in the Baltic Sea Region

2022–2023

The BSPC Rapporteur's 2022-2023
Report on Sustainable Tourism in the Baltic Sea Region
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The Baltic Sea Parliamentary Conference (BSPC) was established in 1991 as a forum for political dialogue between parliamentarians from the Baltic Sea Region. The BSPC aims to raise awareness and opinion on issues of current political interest and relevance for the Baltic Sea Region. It promotes and drives various initiatives and efforts to support the sustainable environmental, social and economic development of the Baltic Sea Region. It strives to enhance the visibility of the Baltic Sea Region and its issues in a broader European context. BSPC gathers parliamentarians from 10 national parliaments, 7 regional parliaments and 5 parliamentary organisations around the Baltic Sea. The BSPC thus constitutes a unique parliamentary bridge between the democratic EU- and non-EU countries of the Baltic Sea Region. BSPC external interfaces include parliamentary, governmental, subregional and other organisations in the Baltic Sea Region and the Northern Dimension area, among them CBSS, HELCOM, the Northern Dimension Partnership in Health and Social Well-Being (NDPHS), the Baltic Sea Labour Forum (BSLF) and the Baltic Sea States Subregional Cooperation (BSSSC).

The BSPC shall initiate and guide political activities in the region; support and strengthen democratic institutions in the participating states; improve dialogue between governments, parliaments and civil society; strengthen the common identity of the Baltic Sea Region by means of close cooperation between national and regional parliaments based on equality; and initiate and guide political activities in the Baltic Sea Region, endowing them with additional democratic legitimacy and parliamentary authority.

The political recommendations of the annual Parliamentary Conferences are expressed in a Conference Resolution adopted by consensus by the Conference. The adopted Resolution shall be submitted to the governments of the Baltic Sea Region, the CBSS and the EU and disseminated to other relevant national, regional and local stakeholders in the Baltic Sea Region and its neighbourhood.

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I. Introduction

The Baltic Sea Parliamentary Conference (BSPC) remains committed to promoting sustainable tourism in the Baltic Sea region with a view to ecological, economic, social, and cultural aspects. Following the final recommendations of the BSPC Working Group on Sustainable Tourism for the 26th BSPC resolution and the establishment of the BSPC Rapporteur mandate on sustainable tourism in 2017, this commitment was renewed in the resolutions of the 30th¹ and 31st² BSPC in 2021 and 2022. The present Report on Sustainable Tourism in the Baltic Sea Region 2022–2023 – the fifth of its kind – follows the tradition established in 2017 and provides an overview of political developments, projects, events, and publications in connection with sustainable tourism policies and initiatives in Europe and in the Baltic Sea region.



Ms Birgit Hesse

The past three years have been especially challenging for the tourist industry, with the COVID-19 pandemic having caused a worldwide decline in international tourist arrivals of up to 72% in 2020. According to the United Nations World Tourism Organisation (UNWTO), international tourist arrivals have been showing signs of gradual and slow recovery throughout 2021–2022 and have reached 80% of pre-pandemic levels in the first quarter of 2023.³ In Europe, international arrivals have now reached 90% of pre-pandemic levels – compared to the first quarter of 2019 – with Southern Europe even showing a slightly positive trend. However, the UNWTO Panel of Experts survey has demonstrated that many

¹ See Item 14 of the Conference Resolution Adopted by the 30th Baltic Sea Parliamentary Conference (BSPC), 30 August 2021, <https://docs.google.com/viewerng/viewer?url=https://www.bspc.net/wp-content/uploads/2021/08/30-BSPC-Resolution-2021-adopted.docx&hl=en>.

² See Item 9 of the Conference Resolution Adopted by the 31st Baltic Sea Parliamentary Conference (BSPC), 14 June 2022, <https://www.bspc.net/wp-content/uploads/2022/06/Conference-Resolution-31-BSPC.pdf>.

³ UNWTO, *Tourism on Track for Full Recovery as New Data Shows Strong Start to 2023*, 9 May 2023, <https://www.unwto.org/news/tourism-on-track-for-full-recovery-as-new-data-shows-strong-start-to-2023>.

experts doubted that international tourism could fully recover to pre-pandemic levels before 2024. For the coming years, it is forecasted that tourists would travel closer to home and seek value for money due to the challenging economic situation, high inflation, the energy crisis caused by the Russian war of aggression against Ukraine. The Organisation for Economic Co-operation and Development (OECD) documented that tourism recovery in 2022 largely exceeded expectations for many countries,⁴ but observed that domestic tourism was expected to recover by 2023, and international tourism – no earlier than 2025 or later.

In the Baltic Sea region, Germany, Poland, and Denmark have ranked among the top twenty destinations for international tourists in world comparison in 2022, according to UNWTO.⁵ Yet all three states experienced declines in international tourist arrivals compared to 2019 – with Germany having experienced a 28% decline, Poland – 30%, and Denmark – 2%. OECD reported that countries neighbouring Russia and Ukraine had seen slower recovery compared to other states in Europe, with Estonia, Finland, Latvia, and Lithuania remaining below or significantly below 2019 levels in 2022.⁶

It is important to note that aggregated statistical data cannot account for the economic, social, cultural, and psychological damage the COVID crisis and the war in Europe have dealt and continue to deal to tourism stakeholders, tourist SMEs, the societies at large, and individuals. According to the European Commission, the tourism ecosystem was one of the most heavily affected by the COVID-19 crisis,⁷ while the war in Ukraine has caused an additional blow to economic recovery with far-reaching direct and indirect consequences for the tourism industry, according to the OECD. These effects go far beyond economic losses and cannot be fully elaborated at present.

Despite the ongoing crises, the past years have also witnessed multiple developments and initiatives, which could help strengthen the tourism ecosystem in the future. At the level of the European Union, the Transition Pathway for Tourism presented in February 2022 and the accompanying co-creation process with European tourism stakeholders aimed to assist the tourism industry in its green and digital transformation in line with the European Green Deal. The European Agenda for Tourism 2030 adopted

⁴ OECD *Tourism Trends and Policies 2022*, November 2022, <https://www.oecd-ilibrary.org/sites/a8dd3019-en/index.html?itemId=/content/publication/a8dd3019-en>.

⁵ UNWTO, *World Tourism Barometer*, Vol. 21, Issue 2, May 2023, Excerpt, <https://www.unwto.org/unwto-world-tourism-barometer-data>.

⁶ OECD *Tourism Trends and Policies 2022*, November 2022, <https://www.oecd-ilibrary.org/sites/a8dd3019-en/index.html?itemId=/content/publication/a8dd3019-en>.

⁷ European Commission, *Transition Pathway for Tourism*, p. 2, <https://ec.europa.eu/docsroom/documents/49498>.

in December 2022 contained a multi-annual EU work plan with actions and responsibilities aiming to make the European tourism ecosystem more sustainable and resilient. In addition, newly developed tools such as the Guide on EU Funding for Tourism and the EU Tourism Dashboard offer valuable data and information for stakeholders and consumers. The organisation of the European Tourism Day in May 2023 – after a five-year pause – represented another positive development paying tribute to the importance of the tourism industry for European economy and labour market.

In the Baltic Sea region, the adoption of the updated EUSBSR Action Plan as well as the recent developments in Policy Area Tourism, the approval of the 2021–2027 Interreg Baltic Sea Region and Interreg South Baltic programmes have provided impetus for new cooperation initiatives and projects to support the development of sustainable tourism in the region. One of the highlights has been the return of the Baltic Sea Tourism Forum (BSTF) in December 2022. The next BSTF is planned to take place on 11 October 2023 in Tallinn, Estonia, continuing the tradition initiated by the Ministry for Economy, Employment, and Tourism and the Tourist Board of Mecklenburg-Vorpommern back in 2008.

The report at hand provides a retrospective overview of these developments and offers a brief reflection on the prospects of joint future work aiming at raising the sustainability and resilience of European and Baltic Sea tourism in the future.

Birgit Hesse

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II. Main Developments in the Field of Sustainable Tourism

1. EU Initiatives to Promote Sustainable Tourism

Transition Pathway for Tourism

On 10 March 2020, the Commission adopted a new industrial strategy¹ in order to support EU industries in their green and digital transitions and to boost the EU's global competitiveness. In light of the experience of the COVID-19 pandemic, the update of the EU industrial strategy² highlighted the need to further accelerate the green and digital transformation and increase the resilience of the EU industrial ecosystems. To do so, the Commission proposed launching transition pathways that were co-created with stakeholders to assist industrial ecosystems in their transformation. Since the tourism ecosystem was the hardest hit by the pandemic and continued to face major challenges to achieve the twin – green and digital – transition, it became the first industrial ecosystem in which a co-creation process was launched to develop a transition pathway.

The development of the Transition Pathway for Tourism started in June 2021 with a stakeholders' consultation on scenarios for the ecosystem shift. Several workshops and stakeholder meetings were held to further brainstorm and elaborate on the relevant proposals. The Transition Pathway for Tourism was also intended to contribute to the request of the European Council in its conclusions of 27 May 2021³ that invited "the Commission and Member States, in participation with relevant stakeholders, to design a European Agenda for Tourism."

The Transition Pathway for Tourism report⁴ was presented on 8 February 2022. On the same day, the European Commission launched an online survey, inviting the EU tourism community to share information about their individual and collective commitments and to express interest in working together on the implementation of the transition. The report covered areas where stakeholders, often in collaboration, should

1 European Commission, *European Industrial Strategy*, https://ec.europa.eu/info/strategy/priorities-2019-2024/europe-fit-digital-age/european-industrial-strategy_en.

2 European Commission, *Communication from the European Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions, Updating the 2020 New Industrial Strategy: Building a stronger Single Market for Europe's recovery*, COM(2021) 350 final, <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52021DC0350&from=EN>.

3 European Council, *Council Conclusions on Tourism in Europe for the next Decade: Sustainable, Resilient, Digital, Global and Social*, <https://www.consilium.europa.eu/media/49960/st08881-en21.pdf>.

4 European Commission, *Transition Pathway for Tourism*, <https://ec.europa.eu/docsroom/documents/49498>.

take action, in order to accelerate the twin transition and promote more resilience in the tourism ecosystem. The measures were designed to yield positive effects for the stakeholders and to benefit the overall tourism ecosystem. It set out several types of measures to be taken by different stakeholder groups, with specific milestones along five building blocks: regulation and public governance, green and digital transition, resilience, investments and funding, monitoring and co-implementation. Overall, the Transition Pathway proposed measures in 27 areas, including:

- developing comprehensive national and regional strategies taking account of economic, environmental, and social sustainability of tourism,
- developing greenhouse gas (GHG) reduction plans by passenger transport companies in line with the Climate Law goals,
- developing the use of locally supplied ingredients with low environmental footprint to reduce the environmental impact of food services,
- establishing large-scale pilots on sustainable tourism, e.g. on islands and remote regions, including the outermost regions,
- enhancing the Guide on EU Funding for Tourism by providing information on recently funded projects and upcoming calls, as well as
- providing a one-stop-shop that would link to key support resources and funding opportunities for tourism SMEs on European, national, and regional level.

In addition, the report provided an overview of plans for supporting and monitoring the industry's green and digital transition within a co-implementation process.

One of the key elements of the Transition Pathway were stakeholder pledges as an integral part of the co-implementation process. This process included multiple steps, along which stakeholders were to be invited to present their voluntary commitments by pledging to take action on specific measures and/or targets set out in the Transition Pathway. Stakeholders were further to be invited to express their interest in participating in task forces to support and track progress on the key dimensions (green, digital, resilience) of the Transition Pathway.

Consequently, in February 2022, the Directorate General for Internal Market, Industry, Entrepreneurship and SMEs (DG GROW) opened a continuously open call for stakeholders to submit their pledges to support the Transition Pathway, with published results 2-3 times a year. These pledges were conceived to show examples of leadership and facilitate best practice sharing. The first three sets of commitments (including a total of 382 pledges) received through the online survey opened by the European Commission⁵ have been published on the respective DG GROW webpage.⁶ The first summary report including 186 pledges for action and 112 organisations expressing their commitment to the Transition Pathway was

⁵ *Call for commitments and participation in the co-implementation of Transition Pathway for Tourism*, <https://ec.europa.eu/eusurvey/runner/Together4EUTourism>.

⁶ *Organisations committed to the Transition pathway for tourism*: https://single-market-economy.ec.europa.eu/sectors/tourism/eu-tourism-transition/tourism-transition-pathway/commitments/organisations_en.

published in June 2022. The second report summarising the second round of commitments collection (with 260 actions and 142 organisations) was published in October 2022.⁷

In February 2023, DG GROW organised a stakeholder event to support the co-implementation of the transition pathway for tourism.⁸ In the next step, an online collaboration stakeholder platform ‘Together for EU Tourism’ is expected to be launched by 2024.

Guide on EU Funding for Tourism

The Guide on EU Funding for Tourism⁹ was first published by the European Commission in May 2021 in order to highlight existing funding opportunities for the tourist sector. An update was then conducted in February 2022. The online guide features a wide range of funding programmes financed by the new EU budget, the Multiannual Financial Framework 2021–2027, and NextGenerationEU. It also provides project examples funded by previous EU programmes.

EU Tourism Dashboard

On 27 May 2021, the Council of the European Union issued its conclusions on Tourism in Europe for the Next Decade.¹⁰ Among other things, the conclusions envisioned the development of an EU Tourism Dashboard,¹¹ as an EU flagship tool for the tourism ecosystem. It should also contribute to the Transition Pathway for Tourism published in February 2022. The development and consultation process started in mid-2021, with EU member states and other organisations contributing to its improvement. The EU Tourism Dashboard was developed by the European Commission’s Joint Research Centre (JRC) and the Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs. It was launched at the end of October 2022.

The EU Tourism Dashboard was conceived as an instrument to support tourist destinations and public authorities in documenting and systemising their progress towards the green and digital transition as well as highlighting vulnerabilities and strengthening resilience. It should also serve to improve access to statistics and policy-relevant indicators for tourism. The dashboard itself represents an online knowledge

⁷ *Transition pathway for tourism: Summary of stakeholder pledges and commitments, 28 October 2022: <https://ec.europa.eu/docsroom/documents/51756/attachments/1/translations/en/renditions/native>.*

⁸ *Together for EU Tourism stakeholders meeting, 7 February 2023, https://single-market-economy.ec.europa.eu/events/together-eu-tourism-stakeholders-meeting-2023-02-07_en.*

⁹ *Guide on EU Funding for Tourism, https://single-market-economy.ec.europa.eu/sectors/tourism/eu-funding-and-businesses/funding-guide_en.*

¹⁰ *Council conclusions on "Tourism in Europe for the next decade: sustainable, resilient, digital, global and social", 27 May 2021, <https://www.consilium.europa.eu/media/49960/st08881-en21.pdf>.*

¹¹ *EU Tourism Dashboard, <https://tourism-dashboard.ec.europa.eu/?lng=en&ctx=tourism>.*

tool, which offers visualisations of tourism-related data and indicators from trusted sources.¹²

The indicators of the EU Tourism Dashboard are sorted into three thematic groups: ‘environmental impacts,’ ‘digitalisation,’ and ‘socio-economic vulnerability.’ The dashboard also offers a set of ‘basic tourism descriptors’ to provide further context regarding the characteristics of tourism destinations in terms of demand, supply, and tourism offer.

The indicators currently cover the 2019–2021 period to show pre- and post-COVID developments. The dashboard offers information and data on 27 EU member states, Iceland, Norway, and Switzerland.

European Agenda for Tourism 2030

In its conclusion on *Tourism in Europe for the Next Decade*¹³ from 27 May 2021, the Council of the European Union called upon the Commission and member states to design a European Agenda for Tourism 2030/2050 in cooperation with relevant stakeholders and to present a first outline by the end of 2021.

On 1 December 2022, the Council of the EU adopted conclusions setting out a European Agenda for Tourism 2030.¹⁴ It included a multi-annual EU work plan to support member states, public authorities, the Commission, and stakeholders in assisting the tourism industry in its transition towards green economy, sustainability, resilience, and digitalisation.

The European Agenda for Tourism is closely linked to the European Commission’s Transition Pathway for Tourism and includes a multi-annual EU work plan following five priority areas: green transition, digital transition, resilience and inclusion, skills and support, and the enabling policy framework and governance. Under each priority, the Agenda identified a number of goals and objectives as well as corresponding actions and responsibilities. These actions described voluntary activities for EU member states, public authorities, the European Commission, and other stakeholders within the European tourism ecosystem.

Actions under the work plan included e.g. the implementation of the EU Tourism Dashboard; support for the development of models and transferable practices for sustainable tourism as well as for establishing large-scale pilots on sustainable tourism across the EU, including on islands and in outermost regions. Furthermore, the Commission and member states would support data-driven sustainable destination management development and provide various forms of support to help companies, start-ups, and local communities innovate with sustainable and resilient tourism services. Another key objective related to meeting the skills demand in the tourism ecosystem by implementing the Pact for Skills, a shared engagement model for skills development. To this end, the Commission, member states, and other relevant public authorities would facilitate and support the establishing of national,

¹² Such as Eurocontrol (<https://www.eurocontrol.int/>), Eurostat, and the European Environment Agency.

¹³ Council conclusions on “*Tourism in Europe for the next decade: sustainable, resilient, digital, global and social*”, 27 May 2021, <https://www.consilium.europa.eu/media/49960/st08881-en21.pdf>.

¹⁴ Council conclusions on ‘*European Agenda for Tourism 2030*’, 1 December 2022, <https://data.consilium.europa.eu/doc/document/ST-15441-2022-INIT/en/pdf>.

regional, and local skills partnerships. In addition, the Commission would establish a stakeholder support platform by 2023.

2. EUSBSR Policy Area Tourism

The previous Reports on Sustainable Tourism in the Baltic Sea Region 2020¹⁵ and 2021¹⁶ have closely followed the update of the EU Strategy for the Baltic Sea Region (EUSBSR) Action Plan. After four years, the revised EUSBSR Action Plan was approved in February 2021. As mentioned in the Report on Sustainable Tourism 2021, Policy Area Tourism was preserved as one of the 14 PAs and now includes three actions to be implemented within the 2020–2025 period:

- transnational tourism development in rural areas,
- investing in people, skills, and technology in the tourism industry,
- protection and sustainable utilisation of cultural heritage and natural resources in tourism destinations.

Main Developments: An Overview

Since April 2022, PA Tourism¹⁷ is coordinated by Poland (Pomorskie Tourist Board) and Finland (Oulu Region). Ms Magda Leszczyna-Rzucidło from Pomorskie Tourist Board and Ms Anna-Maija Toivonen from the Council of Oulu Region act as Coordinators.

According to the EUSBSR Action Plan, PA Tourism provides a platform to reinforce sustainable tourism development in the Baltic Sea region; creates networks and strengthens the dialogue with stakeholders of the tourism industry and tourism education institutions to ensure competence development in the tourism sector across the Baltic Sea region. It develops synergies by linking projects, initiatives and organisations with tourism activities; facilitates and strengthens the cooperation in the area to find solutions for common challenges. EUSBSR PA Tourism enhances the profile, visibility, and attractiveness of the Baltic Sea region as a preferred partner for tourism cooperation within the Baltic Sea region.

On 1 December 2022, PA Tourism organised the 14th Baltic Sea Tourism Forum 2022 webinar, which attracted over 115 participants to discuss future EUSBSR PA Tourism actions. At the beginning of the event, Vice Marshal of Pomorskie Region Mr Wiesław Byczkowski and Mayor of Oulu Region Mr Pauli Harju underlined that the joint coordination of EUSBSR Policy Area Tourism was seen as a great challenge but also a huge opportunity to start new initiatives and find new synergies for tourism cooperation among all BSR countries. A detailed summary of the BSTF 2022 is provided in Section III.8. of the current report.

¹⁵ *Report on Sustainable Tourism in the Baltic Sea Region 2020*, https://www.bspc.net/wp-content/uploads/2020/10/BSPC_WorkingGroupSustainableTourism_2020-2.pdf.

¹⁶ *Report on Sustainable Tourism in the Baltic Sea Region 2021*, https://www.bspc.net/bspc_workinggroupsustainabletourism_2021/.

¹⁷ *EUSBSR Policy Area ‘Tourism’*: <https://www.eusbsr.eu/pa-tourism-about>.

Furthermore, on 20 April 2023, PA Tourism Coordinators welcomed BSR tourist stakeholders to a webinar on EU tourism initiatives. The session featured presentations by European Commission Experts from the Directorate-General for Regional and Urban Policy (DG REGIO) on the EU Transition Pathway for Tourism and the EU Tourism Dashboard, which have been summarised in Section I.1. of the current report.

In the next step, EUSBSR PA Tourism Coordinators are planning to organise the 15th Baltic Sea Tourism Forum to be held on 11 October 2023 in Tallinn, Estonia. The event would be hosted in collaboration with the Green Destinations Conference 2023, with support from the Estonian Ministry of Economic Affairs and Communications, Visit Estonia, Visit Tallinn, and the Council of the Baltic Sea States (CBSS).

Interreg Baltic Sea Region Projects Contributing to PA Tourism

Interreg (European Territorial Cooperation) is one of the two goals of the EU Cohesion Policy. The area of the Interreg Baltic Sea Region Programme covers nine countries: eight EU member states (Estonia, Latvia, Lithuania, Poland, Germany, Denmark, Sweden, and Finland) as well as one non-EU country (Norway). In the previous programming period, Interreg Baltic Sea Region 2014–2020 funded around 200 projects from across the Baltic Sea region.

On 2 June 2022, the European Commission adopted the new Programme Interreg Baltic Sea Region 2021–2027. The Programme is endowed with more than 250 million euro from the European Regional Development Fund and Norwegian national funding. It is envisioned to help organisations from countries around the Baltic Sea to cooperate in one of the four thematic priorities:

- Innovative societies (Priority 1),
- Water-smart societies (Priority 2),
- Climate-neutral societies (Priority 3), and
- Cooperation governance (Priority 4).

Currently, five projects within Interreg Baltic Sea Region Programme 2021–2027 contribute to EUSBSR Policy Area Tourism: BaltSusBoating 2030 (Baltic Sustainable Boating 2030), BaMuR (Baltic Museum Resilience), BASCIL (Innovative Solutions for the Rural Food Production Sector to Diversify into Sustainable Culinary Tourism Services), BSR Cultural Pearls, and Lakes Connect. These projects are shortly summarised below.

BaltSusBoating 2030 (Baltic Sustainable Boating 2030)¹⁸ involves six organisations from Poland, Sweden, Latvia, Finland, and Estonia and would run from October 2022 to September 2024 with a budget of almost 0.5 million euro. The project aims to create a pan-Baltic cooperation platform to turn the Baltic Sea region into a sustainable and competitive leisure boating destination. It is a follow-up of the Baltic

¹⁸ *BaltSusBoating 2030*, <https://interreg-baltic.eu/project/baltsusboating-2030/>, <https://cbss.org/projects-cbss/baltsusboating-2030/>, <https://www.eusbsr.eu/pa-tourism-news/591429-get-to-know-baltsusboating-2030-project>.

Sustainable Boating project, which concluded in March 2022 and was financed by the Swedish Institute. The project is supported by the Council of the Baltic Sea States (CBSS).

BaMuR (Baltic Museum Resilience)¹⁹ is carried out by five partners from Estonia, Sweden, Finland, Lithuania, and Poland. It would last 24 months until September 2024 with a budget of 0.48 million euro. The project aims to equip public authorities, NGOs, and SMEs with a toolbox to help cultural and heritage institutions maintain their consolation role to people in times of crisis.

BASCIL (Innovative Solutions for the Rural Food Production Sector to Diversify into Sustainable Culinary Tourism Services)²⁰ connects 15 partner organisations from Sweden, Estonia, Germany, Lithuania, Poland, Norway, Latvia, and Finland. The project would run from January 2023 until December 2025 with a total budget of 3.39 million euro. It aims to help local food producers in rural areas diversify their business into sustainable culinary tourism services, and thus reach new customers.

BSR Cultural Pearls²¹ involves 12 partners from Sweden, Finland, Latvia, Denmark, Poland, Germany, Estonia, and Lithuania. It would run from January 2023 to December 2025 with a budget of 3.5 million euro. The project aims to help smaller cities and regions be more attractive to live in and improve their quality of life by engaging people in cultural activities and developing a stronger sense of commonship.

Lakes Connect²² involves five partners from Poland, Latvia, and Lithuania. It is a small project running from October 2022 to May 2024 with a budget of 0.47 million euro. Its aim is to establish cooperation among authorities, NGOs, and researchers in order to reduce the impact of tourism on water quality in lakes.

3. Interreg South Baltic: Third and Fourth Seed Money Calls for Projects Contributing to Sustainable Tourism Development

Interreg South Baltic promotes cross-border exchange in the southern Baltic Sea region between the coastal regions in Germany, Poland, Lithuania, Denmark, and Sweden. The Interreg South Baltic Programme 2021–2027 would support projects along four priority axes:

- Innovative South Baltic – enhancing the level of innovation and internationalisation of local actors (Priority Axis 1),
- Sustainable South Baltic – promoting sustainable development and blue and green economy (Priority Axis 2),
- Attractive South Baltic – activating the tourist potential of the South Baltic area (Priority Axis 3),
- Active South Baltic – improving governance cooperation (Priority Axis 4).

¹⁹ BaMuR, <https://interreg-baltic.eu/project/bamur/>, <https://www.eusbsr.eu/pa-tourism-news/591449-get-to-know-the-bamur-project-policy-area-tourism>.

²⁰ BASCIL, <https://interreg-baltic.eu/project/bascil/>.

²¹ BSR Cultural Pearls, <https://interreg-baltic.eu/project/bsr-cultural-pearls/>.

²² Lakes Connect, <https://interreg-baltic.eu/project/lakes-connect/>.

The first regular call for proposals of the Interreg South Baltic Programme 2021–2027 was open between 20 December 2022 and 15 February 2023. The decision on the supported projects is expected to be announced on 22 June 2023. In order to bridge between the 2014–2021 and 2021–2027 programmes, the third and fourth Seed money calls aimed to develop ideas for regular projects to be implemented and financed under the future Interreg South Baltic Programme 2021–2027. Even though the selected projects were to be funded under the Interreg South Baltic Programme 2014–2021, the Seed Money Facility sought to stimulate the development of projects with a view to the new funding priorities. Projects contributing to sustainable tourism development are eligible for funding under both programmes.

The third Seed money call for proposals of the Interreg South Baltic Programme 2014–2020 was open between 13 September and 5 November 2021 and received 69 project proposals. As a result of the third call for seed money projects, 43 projects with a total budget of 40 thousand euro each have been selected for funding. Seven out of 43 projects were selected within the ‘Sustainable tourism’ objective:²³

Acronym	Project Title	Lead Partner
SB Nudging	Nudging in the South Baltic Region	EU-office Skåne Northeast
SeNSE	Sustainable Nature-Based Tourism through Tourism Social Entrepreneurship	Roskilde University
ActiveForAll	Inclusion in active tourism. Model tourism destinations in South Baltic area for people with disabilities and seniors	Kolobrzeg Commune
MariEx	Creating new kinds of maritime experience points for land tourists	Tourism Association Vorpommern
SB MANTA	South Baltic natural and cultural heritage assets management as Tourist Attraction	Administration of Seaside Regional Park
N-B-Well	Nature-based wellness tourism – New Concept of the Sustainable development of the SBA	Klaipeda University
Dark tourism	Improving dark tourism service in South Baltic countrys	Zemaitija National Park Directorate

The fourth Seed money call for proposals was then opened between 27 September and 21 November 2022 and received 27 project proposals. The sum of total eligible budgets requested amounted to 1.08 million euro. Altogether 23 projects with a total budget of 40 thousand euro each have been selected for

²³ 3rd Seed money call Monitoring Committee Decision, https://southbaltic.eu/documents/18165/561564/3rd+Seed+money+call_MC+decision.xlsx/39b9835f-1b22-4bbe-bea4-17b6e40b4d14.

funding in February 2023. Three projects contributing to sustainable tourism development were selected under ‘SME internationalisation’ and ‘Sustainable tourism’ specific objectives:²⁴

Acronym	Project Title	Lead Partner
BALTIC MAN-ORS @ international markets	Supporting SMEs to develop & promote new manor tourism products for international markets	Tourism Association Vorpommern
BeLIVE	Baltic Living History Lessons – we share a passion, a common past and future	Association of Polish Communes Euroregion Baltic
South Baltic Horse Tourism	South Baltic horse tourism – development of horse tourism based on cooperation, joint promotion, and offer management.	Pomorskie Voivodeship

²⁴ 4th Seed money call Monitoring Committee decision, <https://southbaltic.eu/documents/18165/626053/4th+Seed+money+call+Monitoring+Committee+decision.xlsx/25795009-fee1-48d4-a958-7c98f4339e51>.

III. Meetings and Events

1. “Competitive and Sustainable Tourism Sector” Workshop, Interreg Europe Policy Learning Platform, 21 September 2021

On 21 September 2021, the Interreg Europe Policy Learning Platform organised an online workshop on competitive and sustainable tourism.²⁵ The event included three distinct sessions: a panel discussion on Interreg Europe best practices in sustainable tourism development (with presentations from the Baltic Sea region), two parallel working groups, and a plenary session.

The first session featured presentations on the successful tourism development strategy adopted by the Latvian City of Valmiera, the revitalisation of the industrial heritage in the Swedish region Västra Götaland, and the implementation of the CHRISTA project in the Andalusian Province of Granada.

In their presentation on “Tourism development strategy of Valmiera city and surrounding area (Valmiera+),” Ms Lienite Priedaja-Kleperē (Vidzeme Planning region, Latvia) showed how the promotion of the tourism sector in the region of Valmiera was improved through a number of targeted initiatives. Thus, the setup of a shared strategy within Valmiera City allowed connecting several neighbouring municipalities as well as representatives from academia, research, and the tourism industry. The setup of the Gauja national Park tourism cluster brought together around 50 businesses, 9 municipalities, 13 NGOs, and further stakeholders. Both initiatives contributed to a more efficient governance and collaboration among stakeholders in the tourism area and a 30% growth of the sector. Within the cluster, strategic development projects enabled the attraction of additional resources and the development of new products and services. A strong brand emerged and the open dialogue among regional stakeholders enabled the uptake of nature and culture heritage goals in the regional tourism development strategy.

Following this best practice example from Valmiera City, Mr Björn Ohlen from the Västra Götaland Region reported on how regional authorities worked on a proactive strategy to draw more local and especially international tourists into the region telling the story of Sweden’s rich industrial heritage. To this end, the region developed an industrial cultural route with hiking and biking trails and a network that connected industrial museums, people, and remote places. The PRISMA network enabled a close collaboration and provided a common branding and point of entry for a wide range of regional players. With the implementation of its strategy, the Region Västra Götaland had been able to enhance the visibility of its heritage and to involve the local population, on a voluntary basis, in guided tours, to display the heritage and the knowledge of ancient crafts.

Building on these lessons learned, Ms Trinidad Manrique de Lara Vilchez from the Diputación de Granada presented how Granada got inspired by Västra Götaland despite the large distance between the two regions. In the CHRISTA project, they learned that the conditions of the two regions were similar: both

²⁵ *E-workshop recording: sustainable and competitive tourism, 27 September 2021, <https://www.interregeurope.eu/find-policy-solutions/workshop/e-workshop-recording-sustainable-and-competitive-tourism>.*

represented areas with great tourism potential but suffered from depopulation and unemployment. That is why the PRISMA network attracted their interest. Based on the method of Västera Götaland, Granada made the decision to change the Provincial Geopark Strategy to highlight an offer for sustainable tourism based on the rich natural and cultural heritage of the area and to create a network of public and private visitor centres instigating cooperation and common development among the municipalities in the Geopark area. This approach reportedly paid off. By 2019, the number of visitors had nearly doubled to 130,395 up from 65,547 in 2017 and the average overnight stays had increased from 1.69 to 3.31 nights per visitor.

The second session gave the participants an opportunity to join an active debate about Interreg Europe good practices in two parallel working groups, one on joint branding and multi-stakeholder involvement programmes, and the other on developing new geographically distributed and off-season tourism offers.

Working group I (Cooperation for success: joint branding and multistakeholder involvement programmes) discussed three good practices: “From guesthouse to guesthouse cooperation” (Destination SMEs) presenting a network of small guesthouses located in rural areas of North Karelia (Finland), “Benvinguts a Pagès (BaP) - Welcome to the Farm” (EUREGA) on the promotion of Catalan food and food producers through direct visits to farms, orchards, herds, and fishing boats, and Validichiana Living (BRANDTour) with a model of territorial governance to expand proposals of vacation by integrating products/services and improving the competitive positioning of destinations in Tuscany (Italy).

The workshop concluded that joint branding was a useful tool to overcome a weakness of many of the small and very small businesses in the tourism sector, namely the lack of resources and skills for marketing and communication. This was especially relevant for international marketing. All three examples showed how more value (e.g. increase in overnight stays) could be created by working for common goals. Such practices could supposedly help overcome seasonality and fragmentation struggles of the tourism sector. Joint branding was seen as useful in bringing together actors from different supply chains relevant to the tourism sector, for instance agrifood and transportation. It was suggested that well-managed brands could significantly contribute to fight over-tourism by bringing tourists away from the main sites and promoting a diversity of locations. Trust and value-based collaboration among tourist actors was seen as a powerful soft tool to promote diversity in the tourism offer and contribute to the transition towards more sustainable tourism.

Working group II (Off the beaten track: Developing new geographically distributed and off-season tourism offers) considered three good practice examples: the establishment of the “Visit Prosecco Hills” network of tourism-oriented enterprises in the Veneto Region (Local Flavours), the quick response given by the Province of Teruel to help the recovery of local tourism in COVID-19 times (RAMSAT) as well as the public-private partnership that made Via Transilvanica possible and was boosting Romanian ecotourism (MOMAr).

The participants concluded that competitiveness and sustainability did not necessarily contradict each other. If pursued in parallel, they supposedly increased the overall resilience of the tourism sector. In the aftermath of the pandemic, the bulk of regional initiatives and investments needed to target the recovery of local and proximity tourism. As the good practices explored in the working group confirmed, this could be done in cooperation with a variety of different stakeholders – from private companies to NGOs – and should always have the valorisation of the natural and cultural heritage as the ultimate goal.

Finally, the third session was dedicated to the outcomes of the working groups’ deliberations and featured a presentation on financial support for sustainable and competitive tourism under European Structural

and Investment Funds by the European Commission. Ms Ramune Genzbigelyte Venturi (European Commission, DG Internal Market, Industry, Entrepreneurship and SMEs, Unit GROW G1 – Tourism and Textiles) reminded of the severe impact of the COVID-19 pandemic on the tourism sector as well as its importance for the EU in terms of GDP and jobs and noted the need to provide support and work on the transition towards a more resilient, sustainable, and digital European tourism ecosystem. She explained how the European Commission was working jointly with relevant stakeholders on the co-creation of the Transition Pathway for Tourism and towards a European Agenda for Tourism 2030/2050. To this end, she touched upon the key lessons from the “Regional impacts of the COVID-19 crisis on the tourist sector” study. According to the study, tourism growth needed to be managed responsibly; tourism needed to be sustainable; digitisation became the new backbone of tourism; collaboration, innovation, and creative ideas were essential. Ms Venturi concluded by underlining the relevance of tourism in the Interreg Programme 2021–2027 and noted that investments in tourism were possible through all five policy objectives supported by the European Regional Development Fund (ERDF).

In conclusion, it was observed that the tourism sector had been hit hard by the COVID-19 pandemic and was starting to show signs of a slow recovery. The workshop on competitive and sustainable tourism sector highlighted a number of successful strategies that drove this recovery by bringing visitors to remote areas, attracting both local and international tourists, and increasing overnight stays. A key success factor had reportedly been the collaboration of dispersed actors through functioning networks that worked under a common branding, as well as the launch of communication strategies and marketing campaigns. Different regions had been creating alternative tourism offers, away from the hot spots offering open-air tourism, enabling people to enjoy natural and cultural heritage and the rural environment. This type of tourism had been particularly appreciated by the local population in times of the pandemic. The approaches presented showed that regions were promoting alternative modes of transport ranging from hiking and biking to canoes and horseback riding. They were also promoting local delicacies enabling them to strengthen their local businesses, particularly in rural areas. Regional authorities supported the development of these new sustainable and competitive tourism offers financially and used Interreg Europe projects to inspire policy changes and new strategies.

2. “Towards an EU Strategy for Sustainable Tourism” Event, 1 October 2021

The Seas, Rivers, Islands and Coastal Areas Intergroup (SEARICA) event titled ‘Towards an EU Strategy for Sustainable Tourism: Building forward smarter and greener in the EU coastal & insular regions,’ co-organized by the Conference of Peripheral Maritime Regions (CPMR) and co-funded by WINTER MED project (Interreg MED programme) was held online on 1 October 2021.²⁶ This event aimed to provide an opportunity for a virtual exchange between members of the EU Parliament, the European Commission, representatives from CPMR coastal and insular regions, and key territorial stakeholders.

The event was divided into two main sessions and addressed such issues as the situation of the tourism

²⁶ *Towards an EU strategy for sustainable tourism: Fighting seasonality in the EU coastal & insular regions*, <https://cpmr.org/projects/towards-an-eu-strategy-for-sustainable-tourism-fighting-seasonality-in-the-eu-coastal-insular-regions/30152/>.

sector in the EU coastal regions in view of the pandemic crisis as well as the medium-long term reflection on an EU strategy for sustainable tourism towards a smarter, greener, and more resilient sector. It also featured targeted consultations on scenarios towards co-creation of the Transition Pathway for Tourism by the European Commission.

According to the situation analysis, the global health and economic crisis triggered by the COVID-19 pandemic had severely affected the travel and tourism sector, particularly in coastal areas and islands. However, it had allegedly also presented a unique opportunity to reflect on the current tourism model and rebuild it differently, from overcrowded, poorly managed, and environmentally damaging, to well-managed growth implementing green measures. Some European regions had reportedly started to show the first signs of recovery during the 2021 summer season. The European Commission and member states, through the NextGenerationEU recovery funds, had aimed to boost European tourism recovery with special focus on green and digital transition. Some member states in particular were already committed to the transformation of the tourism sector, including via the tourism component in their national recovery plans. EU funding support was equally important to finance a long-term strategy for recovery in the tourism sector and to recover those areas strictly dependent on tourism.

To lay the basis and support the green and digital transition, the European Commission was conducting a stakeholders' consultation process on the Transition Pathway for Tourism to further develop an EU Agenda for Tourism 2030/2050. At the same time, the European Parliament drafted an INI report on an EU strategy for sustainable tourism to structure the guidelines towards a smarter, greener, and more resilient sector in 2021.²⁷ In addition, it was noted that the Glasgow Declaration on Climate Action in Tourism would represent an important step to secure strong actions and commitments from the tourism sector.

The event was opened by Ms Eleni Marianou, Secretary General at the CPMR, who highlighted the importance of discussing the future of European tourism against the backdrop of consultations organised by the European Commission. Ms Marianou underlined the CPMR's catalysing role in this process, e.g. through its contribution to DG GROW's consultation on the Transition Pathway for Tourism. Throughout the meeting, she stressed the importance of involving regional authorities in the implementation of national action plans and EU roadmaps to the benefit of the tourist sector and to adapt to climate change threatening coastal tourism.

The first session featured an exchange between the European Commission, CPMR Regions, and MEPs. Ms Valentina Superti, Director responsible for Ecosystems II: Tourism & Proximity (Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs, DG GROW), opened the first session stressing that regions were at the core of the EU tourism strategy, and the most popular tourism activities in regions were threatened by seasonality and climate change. However, the recovery of the tourism sector was reportedly moving forward, as more and more member states were including a tourism component in their national recovery or tourism related measures. Ms Superti highlighted how the European Commission had launched a co-creation process on the Transition Pathway for Tourism, which intended to include all tourism stakeholders in the creation of a roadmap for a green, digital, and resilient tourism sector in the EU. Finally, she emphasised that the tourism transition needed to focus on green and digital

²⁷ See, also: *Report on Sustainable Tourism in the Baltic Sea Region 2021*, pp. 8–11, https://www.bspc.net/bspc_workinggroupsustainabletourism_2021/.

issues, strengthen the sustainable development of tourism, protect communities and natural habitats, secure carbon neutrality, and invest in nature-based solutions.

Mr Christos Economou, Deputy Director – Head of Unit (Directorate-General for Maritime Affairs and Fisheries, DG MARE), remarked that in the blue economy, tourism was seen as a traditional sector, but time was ripe to give space to innovation and change in the framework of green recovery. He stressed the importance of promoting this new way of tourism, via coordination and cooperation among all stakeholders. He also presented DG MARE's plan to manage the BLUE INVEST platform, a blue investment initiative for SMEs that provided solutions linked to green and blue economy in different aspects. Finally, he underlined the importance of cross border cooperation and creating partnerships such as the Cruise dialogue session organised by DG MARE to gather all the cruise sector stakeholders.

During the interventions of political representatives from CPMR Geographical Commissions, Mr Harry Bouveng, Vice-Chair of the Maritime Working Group of the CPMR Baltic Sea Commission and Regional Councillor of Stockholm, shared experiences from Region Stockholm and presented key points on supporting sustainable, resilient, and competitive tourism in a post-COVID-19 context in the Baltic Sea region. Mr Bouveng highlighted how the tourism industry in the Baltic Sea region had been significantly impacted by the loss of international arrivals due to the pandemic. Nevertheless, the region was facing a slow recovery and had a positive outlook for 2022. He underlined that Stockholm had supported the industry via funds for municipalities, EU-funded projects that supported SMEs within the tourism industry, and through business coaching. Mr Bouveng stressed the importance of funding, innovation, and sustainable development, in particular in the context of the post-pandemic recovery.

The second session was dedicated to sustainable tourism and integrated management on islands. As part of the interventions by regional representatives/territorial stakeholders from island member regions of the CPMR belonging to different sea basins, Mr Mats Jansson, Business Development Strategist at Region Gotland (Sweden) and member of the CPMR Baltic Sea Commission, presented the key tourism areas that Gotland was developing. These included food and drink as well as outdoors experiences based on island nature and culture. Moreover, he described how stakeholders worked together in each area to focus on new innovative and sustainable solutions, working with local raw materials and circular economy to achieve change.

During the exchange between key organisations and participants, Ms Virginia Fernandez-Trapa, Programme Officer at the United Nations World Tourism Organisation (UNWTO) highlighted that the Glasgow Declaration on tourism and climate aimed to secure strong action in the framework of COP26. She underlined that signatories signalled their intention to supporting the global commitment to halve emissions by 2030 and reach Net Zero as soon as possible and before 2050, delivering climate action plans within 12 months from becoming a signatory and implementing them, reporting publicly on an annual basis on progress on targets and actions, and working in a collaborative spirit. She stressed the important role played by the tourism sector, and thus the importance of the tourism stakeholders' subscription to the Glasgow Declaration on Climate Action to work urgently together within a consistent wide sector approach to accelerate change.

3. European Tourism Forum 2021, 17 November 2021

On 17 November 2021, the 20th European Tourism Forum was organised by Slovenia as then presiding country of the EU Council in cooperation with the European Commission.²⁸ The event followed an informal meeting of EU tourism ministers on 16 November 2021. The central topic discussed was the preparation of the Transition Pathway for Tourism to increase resilience and achieve sustainability goals by 2030. The Transition Pathway for Tourism document, which was in its final stages of preparation at that time, was expected to provide the basis for the European Agenda for Tourism 2030/2050.

Participants were greeted by then Slovenian Minister of Economic Development and Technology Mr Zdravko Počivalšek, Commissioner for Internal Market Mr Thierry Breton, Director of Tourism and Proximity at the European Commission's Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs (DG GROW) Ms Valentina Superti, and Vice-Chair of the Committee on Transport and Tourism (TRAN) in the European Parliament Dr. István Ujhelyi. Secretary General of the United Nations World Tourism Organization (UNWTO) Mr Zurab Pololikashvili delivered his welcoming words as a special guest. Speakers highlighted the first signs of recovery of European tourism in the summer of 2021 and the great importance of the global COVID certification and vaccination in the recovery of tourism. They stressed the importance of restoring tourist confidence in travel for the successful recovery of tourism. They emphasised the need for a sustainable and digital transformation of European tourism for more successful and resilient tourism in the future. The inclusive mode of operation was also seen as a crucial element for the success of tourism.

The first part of the meeting was dedicated to good practices implemented by tourism stakeholders to support the sustainable transition of EU tourism. The importance of training for sustainability and acquiring appropriate staff to work in tourism was also addressed. In addition, participants underlined the importance of considering the quality of life of the local population.

The second session addressed issues of monitoring and documenting the development of the tourist ecosystem. Participants presented innovative best practices in tourism data collection and reporting. Representatives of Eurostat and the Statistical Office of the Republic of Slovenia emphasised that statistical offices were not only collecting and analysing data, but could also help identify and monitor indicators of the impact of tourism on the environment and the local population.

The third session presented the advantages of digital innovations in tourism. Bordeaux and Valencia presented their activities as the winners of the European Capital of Smart Tourism 2022 project. Thus, Valencia shared its experience in developing the public-private partnership and the tourism foundation. They worked closely with airlines and jointly planned the promotion of specific destinations. In addition, Slovenian capital Ljubljana presented its successful practices in the field of digitalisation, sustainability, and innovative tourist products.

²⁸ *European Tourism Forum 2022*, https://single-market-economy.ec.europa.eu/events/european-tourism-forum-2022-2022-11-15_en; *Slovenian Tourist Board, European tourism industry and destinations on the path to sustainable and digital transformation*, <https://www.slovenia.info/en/press-centre/press-releases/18079-european-tourism-industry-and-destinations-on-the-path-to-sustainable-and-digital-transformation>.

State Secretary Mr Simon Zajc and Head of the Tourism and Textiles Unit of DG GROW of the European Commission Ms Marie-Helen Pradines delivered their closing remarks at the end of the event. State Secretary Zajc underlined his conviction that the discussions at the 20th European Tourism Forum would contribute to further cooperation and work for climate neutral, smart and innovative, responsible and inclusive tourism of the future, which would keep Europe at the forefront of the world tourism market in the long run.

Ahead of the forum on 16 November 2021, an informal meeting of EU tourism ministers was organised via an audiovisual link. The discussion focused on the Transition Pathway for the green and digital transformation of the European tourism ecosystem by 2030. At the meeting, ministers discussed key measures for the preparation of a concrete set of measures for the recovery of the tourist ecosystem. They agreed that the essence of tourism recovery must be a green and digital transition and that Europe needed to establish a sustainable and resilient tourism ecosystem. They emphasised the need to strengthen the resilience of European companies and industry in the light of future crises. They also emphasised the need to re-establish safe tourist travel and restore consumer confidence. In addition, EU tourism ministers underlined the importance of an open and well-functioning single market, which would ensure open transport routes, and spoke about the importance of financing the recovery of the tourism sector. EU ministers also highlighted the importance of education, training, retraining, and further training in the tourist ecosystem. It was crucial to provide the right skills to meet the challenges of digitalisation and the green transition.

The importance of developing adequate databases and common data spaces for data exchange was seen as an important part of recovery and the green and digital transition. The need to strengthen innovation for the tourism ecosystem and accelerate business processes was also emphasised. In the discussion, EU ministers underlined that the differences between member states and regions should be taken into account, since remote and island regions also need sustainable and digital solutions. The ministers also stressed the importance of participation and cooperation of all stakeholders in the recovery process at all levels. They emphasised the importance of sharing good practices and the need to provide sufficient time to prepare for recovery measures.

At the end of the debate, EU ministers agreed that the Transition Pathway for Tourism would provide a good basis for preparing a European Agenda for Tourism 2030-2050.

4. “Branding of the Baltic Sea Region as a Single Maritime Destination for Sustainable Coastal Tourism”, Project Final Conference, 22 February 2022

On 22 February 2022, the Council of the Baltic Sea States (CBSS) welcomed all interested participants to the final conference of the Baltic Sea Boating (BSB) project with a focus on “Branding of the Baltic Sea Region as a Single Maritime Destination for Sustainable Coastal Tourism.”²⁹ The BSB project was supported through Baltic Sea region seed funding from the Swedish Institute and ran from September 2020 to September 2021, with the CBSS acting as project coordinator.

At the event, project partners presented the outcomes of the project and discussed the development of a

²⁹ Conference: *Branding the Baltic Sea Region as a Single Maritime Destination for Sustainable Coastal Tourism*, <https://cbss.org/event/conference-branding-the-baltic-sea-region-as-single-maritime-destination-for-sustainable-costal-tourism/>.

common branding approach to support and develop sustainable maritime tourism in the Baltic Sea region, with a special attention to small harbours and marinas.

In his inspiration speech at the beginning of the event, Mr Marcus Andersson, Co-Founder and CEO of Future Place Leadership, analysed existing and successful regional brands with a view to creating a common brand for the Baltic Sea region as a green tourist destination. Mr Andersson underlined the importance of highlighting the region's contribution to the world, being timely and innovative, building a good reputation, and “outsourcing the marketing,” i.e. letting others convey the message for oneself (e.g. through youth ambassadors). Imagining the Baltic Sea region as a brand, he proposed to think about a common identity or common decision-making. Whereas the economic identity had allegedly weakened, the political identity in the BSR became stronger. Common policies and a common approach to address the climate emergency in the BSR could therefore become an important and powerful part of the Baltic Sea region's brand. To this end, Mr Andersson suggested the following ideas:

- need for a common purpose with a global reach,
- challenge-driven place branding with the need for a credible plan to save the environment for effective green branding,
- destination enlargement and slow cruising,
- developing ports as hubs for sustainability.

In the closing panel discussion of partner countries' representatives, participants underscored the importance of working together despite the competitive nature of the tourism industry. Participants also stressed the value of experience exchange as well as sharing ideas.

5. “The Road to Sustainable Cruise Tourism”, Second Pan-European Cruise Dialogue, 1 March 2022

On 1 March, the European Commission's Directorate-General for Maritime Affairs and Fisheries (DG MARE) organised the second Pan-European Cruise Dialogue.³⁰ It focussed on measures the EU was undertaking in order to support the sector in its recovery from the COVID crisis and align it with the objectives of the European Green Deal with the aim of developing a more sustainable and resilient cruise tourism sector in Europe.

The event featured speakers from the European Commission, the European Parliament, the Cruise Lines International Association (CLIA), the European Sea Ports Association (ESPO), the European Travel Commission (ETC) and other cruise tourism stakeholders. In four panels, participants addressed sustainable cruise destinations management, green transition as well as specific measures in the Baltic Sea and in the Mediterranean regions. Cruise tourism's governance structures and respect for local cultures were also issues on the agenda. The conference brought together the entire cruise tourism sector, including the

³⁰ *2nd Pan-European Cruise Dialogue*, https://commission.europa.eu/events/2nd-pan-european-cruise-dialogue-2022-03-01_en.

industry, ports, destinations, tourism authorities, countries, regions, towns as well as European institutions and agencies.

European Commissioner for Environment, Oceans and Fisheries Mr Virginijus Sinkevičius, who hosted the event, underlined that the Commission had acted strongly to help the sector recover. The development of the EU's Health and Safety Seal for tourism establishments and the Digital COVID Certificate in particular had reportedly been a success story. However, in order to become more resilient in the future, the cruise tourism sector would need to reinvent itself, by reducing its environmental impact while generating value for consumers. Through NextGenerationEU, a 800 billion euro recovery plan, the EU intended to support the green and digital transition plans of the industry.

As Commissioner Sinkevičius pointed out, the cruise sector may not return to its pre-crisis state. A new generation of tourists supposedly had new expectations – in terms of the impact on the climate, the environment and on coastal communities. According to the Flash Eurobarometer Report on the preferences of Europeans towards tourism 2021, over 80% of EU citizens were prepared to change their travel and tourism habits to be more sustainable and environmentally friendly.

At the event, sustainable cruise tourism for the coming years was examined with the aim to highlight good practices that leveraged partnerships of cruise tourism stakeholders and amplified their joint efforts. There was strong consensus that a European framework for sustainable tourism was needed. The conclusions of the Pan-European Cruise Dialogue were expected to feed into then ongoing work on devising a common EU Agenda for Tourism 2030 as well as the Commission's new approach to a sustainable blue economy from May 2021.

6. Conference of EU Tourism Ministers, 17–18 March 2022

On 17–18 March 2022, the French Presidency of the Council of the European Union organised the first in-person meeting of EU tourism ministers since the start of the pandemic.³¹ The meeting was held in Dijon, France, and chaired by Mr Jean-Baptiste Lemoyne, Minister Delegate for Tourism, alongside Mr Thierry Breton, European Commissioner for the Internal Market.

This conference focussed on the best practices implemented by member states while demonstrating the importance of action at EU level in order to support and transform the sector, by encouraging intra-European tourism and promoting Europe as a destination within Europe and beyond. The discussions aimed to create shared areas of work in order to draw up a an EU Agenda for Tourism 2030.

The first round table focussed on domestic tourism in Europe. The European Commission, the UN World Tourism Organization (UNWTO) and the World Travel & Tourism Council presented their vision for the recovery of international tourism and the opportunities provided by increased tourism of Europeans in Europe. In his address to EU tourism ministers, UNWTO Secretary-General Mr Zurab Pololikashvili warned of the “triple threat” of the ongoing COVID-19 pandemic, the climate emergency, and the war in Europe. He stressed that tourism had an active role to play in reasserting shared values and

³¹ *The Conference of Tourism Ministers (17-18 March 2022)*, <https://www.diplomatie.gouv.fr/en/french-foreign-policy/europe/the-french-presidency-of-the-council-of-the-european-union/article/the-conference-of-tourism-ministers-17-18-march2022>.

promoting peace, and underlined the need for enhanced cooperation and solidarity. Mr Pololikashvili called on the EU governments to provide tourism with the support it needed to make a difference, while also commending the recovery plans of many EU member states. Subsequently, EU tourism ministers and Mr Thierry Breton discussed the work carried out by the European Commission as part of the transition and transformation of the sector. The intention was to identify best practices from each member state to promote intra-European and sustainable tourism.

The second round table featured discussions about the ways to make Europe a global destination for sustainable tourism. The French Presidency chose to address this issue from the perspective of transforming the industry and promoting sustainable transport.

7. European Tourism Forum 2022, 15 November 2022

The 2022 edition of the annual European Tourism Forum was organised by the Czech Presidency at the Council of the EU on 15 November 2022 in Prague.³² The forum brought together tourism authorities, representatives of the tourism industry and destinations, international tourism organisations, and EU institutions as well as heads of national tourism boards to discuss a broad array of topics ranging from the implementation of the Transition Pathway for Tourism, proposals for short-term rentals (STR) regulation, to current trends in tourism.

The conference was opened by the Vice-Prime Minister for Digitisation and Minister of Regional Development of the Czech Republic, Mr Ivan Bartoš, who underlined that tourism was going through a challenging period. The COVID pandemic and the aggression of the Russian Federation against Ukraine showed the need for cooperation and partnership. Mr Bartoš noted that the European Agenda for Tourism 2030 was in its final stage at that point and that the European Tourism Forum 2022 would mainly focus on the lessons learned from the pandemic. He also described the Czech priorities for tourism, which included sustainability, resilience, and digitalisation.

In his video message at the beginning of the conference, Mr Thierry Breton, Commissioner for the Internal Market, also referred to the immense challenges the tourism industry was facing against the backdrop of the pandemic, the ongoing geopolitical tensions, security concerns, the energy crisis, and inflation. He then outlined the initiatives and activities the European Commission was undertaking to support the European tourism ecosystem, specifically the Transition Pathway for Tourism. He noted that much progress had been achieved on the EU Tourism Agenda 2030. One of the key activities of the Commission was data collection and information sharing on short-term rental accommodations. Finally, he addressed labour shortage as another major challenge for tourism and mentioned that the Commission would announce 2023 as the European Year of Skills. Mr Breton suggested that this could be an opportunity to attract skilled workers to the European tourism ecosystem from within the EU and beyond.

From the UNWTO, Secretary General Mr Zurab Pololikashvili welcomed the development of the

³² *European Tourism Forum 2022*, https://single-market-economy.ec.europa.eu/events/european-tourism-forum-2022-2022-11-15_en.

European Agenda for Tourism and underlined the importance of youth participation. In this regard, he mentioned that UNWTO was organising the first Global Youth Tourism Summit from 27 June to 3 July 2022 in Sorrento, Italy. He also pointed out the need for motivated and qualified tourism professionals. Subsequently, Prof. Alessandra Priante, UNWTO Regional Director for Europe, outlined the current situation in the tourism industry. Prof. Priante noted that the tourism situation in Europe and in the Middle East was improving compared to the years 2020–2021. In Europe, Albania was performing especially well due to lower prices. She then described the double challenge European tourism was facing. This included widespread workforce shortage and the need for reinventing the mode of communication between policy-makers and tourism stakeholders. The latter meant adapting to the demand with a view to developing environment conscious travel packages, particularly for the youth, and improving supply, e.g. with attractive service-oriented jobs, addressing the issue of seasonality, etc. Prof. Priante then stressed that sustainability, jobs and skills, investment and innovation as well as tourism for rural development were the core pillars of recovery.

Closing the opening session, Mr István Ujhelyi, Vice-Chair of TRAN Committee of the European Parliament, noted that tourism lay within the competence of member states. However, the COVID-19 crisis had shown that it was indeed a European issue. Mr Ujhelyi stressed the need for short-term support and long-term funding and underlined that tourism was an industry of peace, the potential of which could only be realised in times of peace. He then outlined three areas that the European Parliament was planning to focus on in the upcoming months. These included the implementation of the European Green Deal, especially with a view to the social aspect of tourism, training and education, and support for local SMEs. In conclusion, he called for a separate budget line to support tourism in the future, a clear strategy with a crisis management mechanism, and stronger governance at the European level.

The first session of the European Tourism Forum 2022 then focussed on the application of the Package Travel Directive (EU Directive 2015/2302), in particular with regard to the problems encountered during the COVID-19 pandemic, the safeguard mechanisms, as well as possible changes to the Directive. The second session was dedicated to the proposal for a regulation on short-term rentals, which the European Commission planned to publish in the autumn of 2022. The session also included the views of professional associations in the context of creating an appropriate regulatory framework for STR. In the third block, Ms Marie-Hélène Pradines from the European Commission's DG GROW spoke about the Transition Pathway for Tourism with a focus on sub-areas such as digitalisation of the operations or services and a green dimension of tourism and carbon footprint calculation. The final fourth block took a look at trends in tourism, focussing on practical examples of how to develop tourism in a sustainable and resilient way.

8. Baltic Sea Tourism Forum 2022, 1 December 2022

On 1 December 2022, the new EUSBSR Policy Area Tourism Coordinators from Pomorskie Tourist Board and Oulu Region brought back the Baltic Sea Tourism Forum (BSTF),³³ last organised in November 2020 in the form of a digital conference. Similar to the 13th BSTF, the 14th Baltic Sea Tourism

³³ *Baltic Sea Tourism Forum 2022 webinar*, <https://www.eusbsr.eu/pa-tourism-news/591411-watch-the-baltic-sea-tourism-forum-2022-webinar-here>.

Forum was held online. It attracted over 115 participants and included three sessions dedicated to a wide range of topics. These included introducing the priorities and plans of PA Tourism, presenting inspiration and experience with innovative approaches to tourism from the city of Tel Aviv, outlining the main trends in Baltic Sea tourism, presenting youth recommendations to PA Tourism, exchanging views with the representative of the Baltic Sea Commission of the CPMR on coastal tourism, and displaying local practices from the Baltic Sea region.

The 14th BSTF was addressed by the Vice-Marshall of Pomorskie Region, Mr Wiesław Byczkowski, followed by the Mayor of Oulu Region, Mr Pauli Harju. Mr Byczkowski noted that the COVID-19 pandemic had highlighted the transnational dimension of the tourism industry as well as the need for concerted transnational tourism policies and expressed his intention to closely cooperate with the Oulu region to develop a platform to exchange information, experience, and knowledge on tourism in the BSR. Mr Pauli Harju, Mayor of Oulu Region, also stressed the consequences of the pandemic for the tourism industry, noting that the industry had not yet returned to the pre-pandemic level, but emphasising the general trend was upward. He stressed that the energy crisis, the war, and inflation would further challenge the industry.

Following the opening remarks, EUSBSR PA Tourism Coordinators Ms Magda Leszczyna-Rzucidło from Pomorskie Tourist Board and Ms Anna-Maija Toivonen from the Council of Oulu Region shortly introduced the EUSBSR and its objectives and provided an overview of the priorities of Policy Area Tourism. Subsequently, Ms Marta Chelkowska, Director of Tourism Department, Marshal Office of Pomorskie Region, introduced the Pomorskie woiwodship and its focus on building knowledge about Baltic identity, maintaining regional identity, and strengthening international cooperation. Ms Tina Rajala, Development Director at the Council of Oulu Region, then presented the regional strategy of the Oulu region, which was updated in 2022 and focussed on “international growth, competence and solutions, as well as happy and active people.” Ms Rajala stressed that due to the current geopolitical situation, the BSR had become more important than ever. She summarised the key values of the BSR as courage, trust, and equality.

The opening session was followed by keynote speeches and a Q&A session open to all participants. The first keynote speech was delivered by Ms Yael Froman-Ideses, Tourism Director at Tel Aviv Global & Tourism (R.A) Mayor’s Office. Ms Froman-Ideses described the initiatives of the city of Tel Aviv in developing its own brand as a start-up city. The intention was to activate the potential of young and talented people, tech companies and multinationals and to attract business tourism. The city was working on developing individualised offers to support personalised city experience.

In his presentation on “Tourism 2023: Trends and Implications for Baltic Sea Tourism,” Dr. Eran Ketter took a closer look at the contemporary dynamics of tourism transformation. He outlined ten most prominent trends using the year 2019 as a benchmark:

- The rise in ‘revenge travel’ to compensate for the lockdown years. Dr. Ketter predicted that this trend would continue throughout 2023.
- Financial concerns. The energy crisis and high inflation were prompting tourists to seek value for money, while economic and geopolitical uncertainties influenced certain travel decisions.

- Health concerns against the backdrop of the pandemic. Many people, especially travellers over 55, reportedly paid closer attention to precaution and safety regulations.
- The rise of ‘next-door’ travel. In this regard, Dr. Ketter noted that in the Baltic Sea region, connecting travel in the region could offer good opportunities.
- Attractiveness of urban getaways. Cities were reportedly especially popular among Europeans.
- Rising popularity of culinary travel.
- Desire to experience other cultures and traditions. Dr. Ketter suggested that this could stimulate family stays and agricultural tourism.
- Increased interest in nature tourism. Here, it was noted that interest in hiking and camping was rising, which brought Dr. Ketter to the suggestion to make nature more accessible to tourists.
- Interest in active holidays.
- Increased concern for one’s emotional wellbeing.

The second session, dedicated to tourism insights from the Baltic Sea region, was opened by Mr Lok Hang Abraham Chan, who presented the Baltic Sea Youth Declaration 2022.³⁴ The document represented a list of youth inspired and driven recommendations for policy-makers in the Baltic Sea region. Youth representatives formulated a total of 12 recommendations for EUSBSR Policy Area Tourism with a specific focus on:

- affordability – reducing the cost of travel for young people,
- connectivity – connecting sites through infrastructure,
- sustainability – paying attention to environmental protection.

The document was presented at the EUSBSR Annual Forum, where youth representatives expressed their hope that their recommendations and ideas would be taken up by policy-makers and stakeholders.

Subsequently, the Chair of the CPMR BSC Maritime Working Group and Member of Region Stockholm Assembly, CPMR Baltic Sea Commission Tourism WG, Mr Harry Bouveng shared the experience of the CPMR Baltic Sea Commission on the topic of coastal tourism. Mr Bouveng noted that the Maritime Working Group was focusing on supporting the transition to sustainable coastal tourism, encouraging the recovery of the sector, promoting the BSR as a coastal tourism destination, and promoting the extension of the coastal tourism season. The WG had pointed out the importance of promoting sustainability, digitalisation, and skills in the tourism sector. He stressed that tourism companies were dependent on stability, therefore the recent crises had heavily affected the industry. The number of visitors decreased drastically in 2020–2021. The numbers were slowly returning towards normal levels but were still short of the 2019 level. The negative effects of the pandemic had been especially visible in international tourism. According to Mr Bouveng, the Maritime WG had been discussing ways to promote sustainability of coastal tourism, which was especially relevant for the Stockholm archipelago. The archipelago traditionally

³⁴ *Baltic Sea Youth Declaration 2022*, <https://cbss.org/wp-content/uploads/2022/09/baltic-sea-youth-declaration-2022.pdf>.

attracted many visitors during the summer season. Therefore, attempts were made to reduce over-tourism in summer and promote the archipelago as a yearlong destination. In conclusion, Mr Bouveng underlined the importance of joint projects and initiatives to promote the goals of the EUSBSR.

Closing the session, Mr Matti Pollari, Project manager at Visit Tampere, spoke about sustainable tourism and development in the city of Tampere and presented the REACT EU project on sustainable tourism mobility. Mr Pollari first spoke about the objective of carbon-neutral destination development in Tampere Region with the goal of reaching carbon neutrality by 2030. Visit Tampere was focusing on providing tourists with an opportunity to visit the area in a carbon neutral manner. This work was conducted in four key areas: low-carbon tourism companies, the carbon footprint of mobility in the context of tourism, nature, biodiversity and carbon sinks, financial and social sustainability. He then outlined the aims of the REACT EU project to develop and pilot sustainable travel chains and mobility services for domestic and international tourists in Tampere. The project cooperated with key tourist attractions in the region and promoted bike and rail, outdoor express, and e-car adventures. Mr Pollari concluded, that if done properly, sustainable tourism mobility services could provide a more sustainable and better tourism experience.

9. SusMarTour Final Conference, 7 December 2022

The final conference of the Sustainable Maritime Tourism (SusMarTour) project was held on 7 December 2022 at Värtaterminalen, Ports of Stockholm.³⁵ The project was supported by the Council of the Baltic Sea States (CBSS) and ran from September 2021 to December 2022. Its aim was to develop a methodology and institutional framework for more sustainable, resilient, and inclusive maritime tourism and hospitality sectors in the BSR. It was carried out by the Motus Foundation from Poland, in cooperation with the Baltic Ports Organisation from Estonia and Klaipeda Shipping Research Centre from Lithuania. The final conference of the SusMarTour project invited experts from maritime organisations and institutions across the region to present their concluding remarks on issues related to tourism in the Baltic Sea region.

At the beginning of the conference, Ms Joanna Kniter, Project Manager at the Motus Foundation, introduced the SusMarTour project and gave an overview of the main project activities. Subsequently, Ms Olga Zuin, Programme Coordinator at the Council of the Baltic Sea States, held a keynote speech highlighting the importance of tourism for the Baltic Sea region. Ms Ewelina Ziajka from the Baltic Ports Organisation presented the first part of the final project report dedicated to the current market situation in ferry and cruise transport, sustainable solutions in ferry transport, and major developments in ferry and cruise terminals in Baltic ports. Prof. Vytautas Paulauskas from the Klaipeda Shipping Research Centre, then introduced the second part of the report focusing on transport modelling using graph theory and presenting possible future RoPax lines in the Baltic Sea region. A summary of the project final report on the social, economic, and environmental factors and the main trends influencing future maritime tourism in the Baltic Sea Region is provided in Section IV of the current report.

The second conference session featured presentations by Mr Eike Otto, consultant for tourism and

³⁵ *SusMarTour Final Conference in Ports of Stockholm*, <https://motusfoundation.com/susmartour-final-conference-stockholm/>.

regional development, Ms Egle Lizaityte from the Lithuanian Hotel and Restaurant Association, and Ms Iwona Slojka from the Cross Baltica Sweden AB.

x10. European Tourism Day, 5 May 2023

After five years, the European Tourism Day (ETD) 2023 was held on 5 May in Brussels.³⁶ The aim of the European Tourism Days is to provide a communication platform for European tourism stakeholders. In 2023, the ETD focussed on the green and digital transition, resilience of the ecosystem, and upskilling.

The participants were greeted by Mr Thierry Breton, European Commissioner for the Internal Market, who noted that in the European Union, tourism was understood as an ecosystem. This ecosystem was particularly badly hit during the pandemic, which prompted the European Commission to take quick steps in order to support the industry, and in particular SMEs. Mr Breton then emphasised that the crisis had shown how important and helpful digital tools, such as the EU Digital COVID Certificate, could be for traveling. He emphasised that the Commission made sure that significant funding from NextGenerationEU would be used to support the dual (green and digital) transition of the tourism ecosystem. The Transition Pathway for Tourism represented another important tool to assist the industry in its transformation towards more sustainability and resilience. He concluded by saying that the pandemic had raised many questions, in particular the employability in the sector. The challenge was finding qualified and motivated staff.

Following Commissioner Breton, Ms Karima Delli, Chairwoman of the Transport and Tourism Committee of the European Parliament, delivered her welcoming words and emphasised the economic importance of the tourism sector, which needed a safety net in crisis times. High inflation, the energy crisis, the Russian war of aggression against Ukraine have allegedly prompted a shift in the geopolitics of tourism. Against the backdrop of the green and digital transition goal, Ms Delli underlined the importance of involving stakeholders and having a clear and well-balanced roadmap. The European Agenda for Tourism 2030, published in December 2022, represented such a plan. The next important step was its implementations. Here, member states played a key role. At this point, Ms Delli emphasised that tourism did not fall into the competences of the European Union and called for a special EU budget line for tourism. Further, Ms Delli touched upon the specific legislation on tourism. The European Parliament was reportedly pushing the Commission to set up multimodal integrated ticketing in Europe. Another issue that the European Parliament was dealing with was the question of regulation of accommodation platforms. Europe needed a more sustainable tourism ecosystem for the future, one that would be well regulated. The development of sustainable mobility represented another central area. In conclusion, she emphasised the growing interest for local and eco-tourism.

The opening session was followed by an orientation debate on how to create a resilient, world-leading tourism ecosystem with innovative SMEs and thriving communities. During the next session, dedicated to the Transition Pathway for Tourism, Ms Valentina Superti from DG GROW reported on its state of

³⁶ *European Tourism Day 2023*, https://single-market-economy.ec.europa.eu/events/european-tourism-day-2023-2023-05-05_en.

progress. This progress report was followed by three roundtables, each focusing on the digital transition, the green transition, and skilling and upskilling of tourism actors. In the second round table, dedicated to ecological sustainability, best practices from the Baltic Sea region were presented by Ms Nina Forsell, Executive Manager at the Finnish Lapland Tourist Board, and Ms Eglė Bausytė Šmitienė, Marketing Strategist at Hotel Romantic, Lithuania.

IV. Notable Publications

Preferences of Europeans towards Tourism – Flash Eurobarometer Report 2021

After five years, the ninth Flash Eurobarometer Report on the preferences of Europeans towards tourism³⁷ was published in November 2021. The survey was conducted across Europe in October 2021. The topics covered by the report included:

- travel behaviour, accommodation preferences, and the impact of the pandemic on travel behaviour,
- preferred booking channels and information sources for travel arrangements,
- reasons behind destination choices, and
- opinions and information on sustainable travel.

The survey showed that the COVID-19 pandemic would likely have long-term impacts on EU citizens' travelling behaviour, while also demonstrating the growing importance of sustainable tourist offers for the recovery of tourism. According to the survey, 38% of European respondents were expecting more domestic travel in the future. A large majority of EU citizens (82%) were prepared to change some of their habits to support more sustainable tourism, for example, by consuming local products (55%), choosing ecological means of transport (36%) or by paying more to protect the natural environment (35%) or to benefit the local community (33%).

Furthermore, the survey demonstrated that EU citizens based their destination selection on three aspects: the cultural offer (44%), the natural environment (43%), but also the price of the overall trip (43%). Almost one third of the respondents (31%) preferred to use online platforms for professional accommodation services and another 25% relied on online platforms combining different travel services. When planning their travel, Europeans largely relied on recommendations from friends, colleagues or relatives (56%), which made personal recommendations the most important source of information on tourist destinations by far.

³⁷ *Flash Eurobarometer 499, Attitudes of Europeans towards tourism, October 2021*, <https://europa.eu/eurobarometer/api/deliverable/download/file?deliverableId=78708>.

SusMarTour Final Report: The Future of Maritime Tourism in the Baltic Sea Region 2022

The SusMarTour (Sustainable Maritime Tourism) project financed by the Council of the Baltic Sea States (CBSS) ran from September 2021 until December 2022. The final project report focussing on the social, economic, and environmental factors and main trends influencing future maritime tourism in the Baltic Sea region was published in November 2022³⁸ and presented at the final conference of the project in December 2022. The report provided a comprehensive and rich overview of the current economic situation with maritime tourism in the Baltic Sea region. It presented existing ferry lines, top ferry ports as well as the main cruise destinations in the region and sketched out the impact of maritime tourism on the local labour market. The second part of the report was dedicated to the future development of maritime tourism in the Baltic Sea region. It also proposed a possible RoPax lines network, which could be used for the development of maritime tourism.

The report concluded that the cruise and shipping markets were subject to dynamic changes in recent years. Before the pandemic, market dynamics were more predictable and not strongly affected by external factors. The COVID-19 pandemic and the Russian war of aggression against Ukraine had a major impact on the transport sector in the BSR. Due to restrictions in passenger transport on the majority of ferry and RoPax routes, traffic decreased by approximately 70–80% in 2020. While the pandemic situation had begun to stabilize in 2022, the aggression of the Russian Federation against Ukraine in February 2022 had a strong impact on transportation and tourism in the BSR. For many years, St. Petersburg used to be one of the busiest ports in terms of cruise traffic. After the start of the war, the majority of cruise ships operators stopped calling at Russian ports and at ports in the close vicinity of Russia. This prompted some cruise operators to change the routing in the eastern part of the Baltic Sea. As a result, some of the ships did not call the Port of Helsinki and the Port of Tallinn. While the report emphasised that future forecasts were hard to make, the report observed that before the pandemic, Baltic ports had been receiving a growing number of tourists from ferries and cruise vessels. The report therefore suggested introducing new ferry connections between Baltic Sea ports for easier access not only to the ports, but also to port cities. This could increase the popularity of the Baltic Sea region and promote its attractiveness among tourists.

³⁸ *SusMarTour Project, Social, economic, and environmental factors and the main trends influencing future maritime tourism in the Baltic Sea Region, November 2022, <https://motusfoundation.com/wp-content/uploads/2022/12/SusMarTour-Report.pdf>.*

V. Prospects and Outlook

Looking back at the developments of the past two crisis years since the publication of the previous Report on Sustainable Tourism in the Baltic Sea Region 2021, multiple meaningful initiatives to support the green, innovative, and resilient development of the tourism ecosystem have been undertaken at the EU level and in the Baltic Sea region.

In the future, the implementation of the EU Transition Pathway for Tourism and the EU Agenda for Tourism 2030 would represent central political priorities in the field. In line with the recommendation to “promote sustainable tourism, inter alia by improving cross-border rail transport to enable more climate-friendly travel” contained in Item 14 of the 30th resolution of the Baltic Sea Parliamentary Conference, the BSPC will also closely follow the initiative on EU-wide multimodal travel, currently in preparation.³⁹

In the Baltic Sea region, multiple projects with a focus on sustainable tourism services implemented or planned within the 2021–2027 Interreg Baltic Sea Region and Interreg South Baltic programmes would create additional and new ideas, synergies, and partnerships among regional stakeholders. In line with the objectives of the updated EUSBSR Action Plan, they would help to develop a more sustainable Baltic Sea tourism ecosystem of tomorrow with a view to remote areas, people, skills, and technology, as well as the protection of national environment and cultural heritage. It would also be important to take stock of completed and continued projects, such as SusMarTour (Building resilient and inclusive sustainable maritime tourism in the Baltic Sea region) and BaltSusBoating 2030 (Baltic Sustainable Boating) in order to make the best out of the already accumulated knowledge and experiences.

Against the backdrop of the ongoing war, closer cooperation, promoting understanding and trust in the Baltic Sea region become more important than ever. The 15th Baltic Sea Tourism Forum in October 2023 in Tallinn will once again gather key regional tourism stakeholders from the BSR and beyond to exchange experiences and best practices and elaborate on future activities and initiatives.

For its part, the BSPC will continue closely following these developments following its commitment to promoting sustainable tourism and climate-friendly travel in the region.

³⁹ *EU-wide multimodal travel – new specifications for information services, 15 June 2023, https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/12912-EU-wide-multimodal-travel-new-specifications-for-information-services_en.*

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List of Abbreviations

BSC	Baltic Sea Commission of the Conference of Peripheral Maritime Regions (CPMR)
BSPC	Baltic Sea Parliamentary Conference
BSTC	Baltic Sea Tourism Center
BSTF	Baltic Sea Tourism Forum
BSR	Baltic Sea Region
CBSS	Council of the Baltic Sea States
CoR	European Committee of the Regions
CPMR	Conference of Peripheral Maritime Regions
DG	Directorate-General
DG GROW	Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs
DG MARE	Directorate-General for Maritime Affairs and Fisheries
DG REGIO	Directorate-General for Regional and Urban Policy
ERDF	European Regional Development Fund
ETC	European Travel Commission
EU	European Union
EUSAIR	EU Strategy for the Adriatic-Ionian Region
EUSBSR	EU Strategy for the Baltic Sea Region
GDP	Gross Domestic Product
INI	Own-initiative procedure (Report by European Parliament)
NGO	Non-governmental Organisation
OECD	Organization for Economic Cooperation and Development
PA	Policy Area
PSF	Project Support Facility
SDG	Sustainable Development Goals
SME	Small and Medium Enterprises
UN	United Nations
UNWTO	United Nations World Tourism Organization

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