



BSPC

BALTIC SEA PARLIAMENTARY CONFERENCE

Report on Sustainable Tourism in the Baltic Sea Region

2021

The BSPC Rapporteur's 2021 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. BSPC aims at raising 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 a sustainable environmental, social and economic development of the Baltic Sea Region. It strives at enhancing the visibility of the Baltic Sea Region and its issues in a wider European context.

BSPC gathers parliamentarians from 11 national parliaments, 11 regional parliaments and 5 parliamentary organisations around the Baltic Sea. The BSPC thus constitutes a unique parliamentary bridge between all the EU- and non-EU countries of the Baltic Sea Region.

BSPC external interfaces include parliamentary, governmental, sub-regional and other organizations 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), the Baltic Sea States Sub-regional Cooperation (BSSSC) and the Baltic Development Forum.

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 co-operation between national and regional parliaments on the basis of 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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Introduction

The Baltic Sea Parliamentary Conference is strongly committed to sustainable tourism as a means of promoting cross-border communication while ensuring adherence to environmental standards and respect for the cultural authenticity of hosting communities. Since the establishment of the Rapporteur mandate in 2017, the BSPC has been closely observing relevant developments adopting a broad definition of ‘sustainable tourism’ with a view to ecological, economic, social and cultural aspects. The present – fourth consecutive – Report on Sustainable Tourism in the Baltic Sea Region follows the established tradition and provides an overview of the recent political trends, projects and events in connection with sustainable tourism in the region.

Almost two years since the outbreak of the pandemic, the tourism sector continues to suffer under the unprecedented impacts of the COVID-19 crisis and the path to recovery from the inflicted damages appears blurry and uncertain. Experts agree that the pandemic will continue to affect our economies and social life in the following years, while return to pre-pandemic levels of international tourism is expected no earlier than 2024¹ Due to constantly changing infection rates, the persisting hazards of collapsing national health systems and new virus variations, national governments have imposed several lockdowns, contact limitations, official travel warnings and restrictions as containment measures. In December 2020, the European Commission approved the first vaccine against the virus in Europe. Earlier, Russia became the first European country to begin large-scale vaccination against COVID-19 on 5 December 2020. As more people are vaccinated, hopes for return to



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¹ *Global survey among the UNWTO Panel of Tourism Experts on the impact of COVID-19 on tourism and the expected time of recovery, May 2021, <https://www.unwto.org/international-travel-largely-on-hold-despite-uptick-in-may>.*

normal life slowly start surfacing. Since the common digital vaccination certificate entered into force on 1 July 2021 and multiple tests became available to consumers, whereas countries have cautiously started lifting travel restrictions, confidence in travel and tourism started gradually rising. However, the pandemic has not yet been defeated.

The Baltic Sea region is also facing the consequences of this biggest tourism crisis in history. As predicted in the previous report, the pandemic has led to a dramatic reduction in the number of international arrivals in the first quarter of 2021. In comparison to January–May 2019 by region, Europe has suffered the second largest decline with a 85% drop in international arrivals in the first five months of 2021.² No BSPC member country has been left unaffected by the COVID-19 crisis, even though national tourism economies have been impacted to varying degrees. According to UNWTO, Latvia and Finland recorded the highest decline in international arrivals in the first quarter of 2021 compared to 2019 with a 93% drop, followed by Estonia and Germany with a 92% drop. Norway recorded a decline of 90% in international arrivals, followed by Denmark (88%), Lithuania (87%) and Sweden (82%).³ Bearing in mind that tourism is an important economic factor within the Baltic Sea region contributing between 9% and 1% of national GDP, these figures reflect the damage done to regional economies.

With international travel and tourism largely on hold, new trends with a focus on domestic travel have started emerging, while tourism stakeholders search for new models and tools to adapt to the crisis and prepare for future developments. Thus, e.g. staycations involving caravanning and camping might emerge as a new trend. In the context of persisting uncertainties, the year that has passed since the publication of the previous report could be characterised as a year of reflection, re-evaluation and adaptation. The European Tourism Convention 2020 served as a forum for elaborating on short-term recovery steps but also future strategic priorities for a European Agenda for Tourism 2050. Even though the first outline of the Agenda is still pending, a number of general priorities, such as green and digital transformation, investment in people and skills, improved cooperation and coordination on different levels, appear to be gaining traction. The updated EUSBSR Action Plan places special emphasis on tourism development in remote and rural areas, modernisation of the tourism industry as well as the protection of cultural heritage and natural resources in tourist destinations. The 13th Baltic Sea Tourism Forum (BSTF) provided a platform to exchange crisis mitigation experiences and reflect on future trends, while the First Baltic Sea Region Sustainable Tourism Awards has for the first time in BSTF history showcased and honoured the

² UNWTO *World Tourism Barometer*, Volume 19, Issue 4, July 2021 (Excerpt), https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2021-07/UNWTO_Barom21_04_July_excerpt.pdf?VbGz_hsTz2fuBSOn3i1w7kv0qbI2rTgY=.

³ UNWTO *Tourism Dashboard*, <https://www.unwto.org/international-tourism-and-covid-19>.

achievements in the development and promotion of sustainable tourism destinations, products and services. Yet despite the successful organisation of the first digital BSTF, its future prospects currently remain uncertain. The present report takes a detailed view on these developments and events.

Despite the crisis and the persisting uncertainties, it is essential that the Baltic Sea region further expands intense cooperation to cope with existing and upcoming problems, tasks and developments jointly. With combined forces, the region can overcome obstacles that lie ahead and secure a resilient and sustainable future.

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BSPC Rapporteur on Sustainable Tourism

II. Main Developments in the Field of Sustainable Tourism

1. EU Initiatives to Promote Sustainable Tourism

a) EU Measures to Support Tourism in the Context of the COVID-19 Pandemic

Since the outbreak of the COVID-19 pandemic in early 2020, the European Union has responded with a number of immediate measures as well as strategic recovery plans for the transport and tourism sector. Already in February 2020, the Council of the European Union has urged¹ member states to act together, in cooperation with the European Commission, in order to ensure the protection of public health paying particular attention to international travel, especially in what concerned information and guidance for travellers. Later in March, the Commission adopted a proposal to temporarily suspend the rules for the allocation of slots at EU airports (COM(2020)111)² in order to prevent air carriers from operating flights with a low number of passengers merely to preserve their airports slots. Along with avoiding financial losses for companies, the proposal also aimed to serve the sustainability objective. Further, the Commission issued guidelines (C(2020)1830)³ clarifying the application of the EU passenger rights legislation with a focus on reimbursement, compensation and assistance in light of pandemic-induced travel limitations. In addition, it issued guidelines

¹ Council of the European Union, *COUNCIL CONCLUSIONS ON COVID-19 (2020/C 57/04)*, [https://eur-lex.europa.eu/legal-content/EN/TXT/HTML?uri=CELEX:52020XG0220\(01\)&from=EN](https://eur-lex.europa.eu/legal-content/EN/TXT/HTML?uri=CELEX:52020XG0220(01)&from=EN).

² European Commission, *Proposal for a REGULATION OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL amending Regulation (EEC) No 95/93 on common rules for the allocation of slots at Community airports (COM(2020)111)*, <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF?uri=CELEX:52020PC0111&from=EN>.

³ European Commission, *Notice Interpretative Guidelines on EU passenger rights regulations in the context of the developing situation with Covid-19 (C/2020/1830)*, [https://eur-lex.europa.eu/legal-content/EN/TXT/HTML?uri=CELEX:52020XC0318\(04\)&from=EN](https://eur-lex.europa.eu/legal-content/EN/TXT/HTML?uri=CELEX:52020XC0318(04)&from=EN).

(C(2020)1753)⁴ for border management measures in order to avoid disruptions to the free movement of persons and the delivery of goods and services across the EU. The Commission also proposed to contribute 75 million euros from the EU budget in order to assist member states with repatriation flights for EU nationals.

b) Tourism and Transport in 2020 and Beyond

On 13 May 2020, the **Commission put forward a communication titled “Tourism and transport in 2020 and beyond”** (COM(2020)550)⁵ accompanied by a package of guidance on restoring freedom of movement and lifting internal border controls, on restoring transport and connectivity, on the safe resumption of tourism services, as well as a recommendation on vouchers. As part of the package, the guidance for the progressive resumption of tourism services and for health protocols in hospitality establishments (C/2020/3251)⁶ aimed at providing recommendations for member states and tourism stakeholders in developing common and more specific prevention and control measures in order to restore consumer trust and confidence in tourism and travel.

Additionally, the Commission shared the intention to set up a website with a map combining real-time information on tourism-related information. This initiative resulted in the Re-open EU⁷ platform, which was launched in June 2020 and provides up-to-date information on the epidemiological situation and national coronavirus safety and travel measures in EU member states, Iceland, Liechtenstein, Norway and Switzerland.

⁴ European Commission, *Guidelines for border management measures to protect health and ensure the availability of goods and essential services (C(2020)1753)*, https://ec.europa.eu/home-affairs/sites/homeaffairs/files/what-we-do/policies/european-agenda-migration/20200316_covid-19-guidelines-for-border-management.pdf.

⁵ European Commission, *COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS Tourism and transport in 2020 and beyond*, <https://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=CELEX:52020DC0550&from=EN>.

⁶ European Commission, *EU Guidance for the progressive resumption of tourism services and for health protocols in hospitality establishments – COVID-19 (C/2020/3251)*, [https://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=CELEX:52020XC0515\(03\)&from=EN](https://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=CELEX:52020XC0515(03)&from=EN).

⁷ *Re-open EU*, <https://reopen.europa.eu/en>.

In terms of financial assistance, the communication encouraged member states to make use of the possibilities provided by the Coronavirus Response Investment Initiative to support tourism SMEs as part of the initiated reprogramming of the EU cohesion funds. In relation to safeguarding jobs, the communication referred to the initiative for temporary Support to mitigate Unemployment Risks in an Emergency (SURE) helping states cover the costs of national short-time work schemes. Member states were also encouraged to increase existing opportunities for upskilling through national and EU funds (e.g. the European Social Fund, the European Regional Development Fund, InvestEU, and the European Agricultural Fund for Rural Development). The communication also pointed towards opportunities offered by the Erasmus and Interreg programmes for regions with smart specialization strategies for tourism and European tourism clusters.

Aside from immediate relief measures, the communication also contained an outlook and priorities for the future development of the tourism sector. Special attention was attributed to sustainability, digitalisation and support for SMEs in establishing cross-sectoral linkages, creating networks, sharing knowledge and building capacities to promote innovative tourism products and services.

In addition, the Commission announced plans to organise a European Tourism Convention in late 2020. The aim of the convention was to bring together representatives of EU institutions, regions, cities, industry and academia in order to reflect about the strategic development of European tourism and to jointly pave the way for a roadmap (“European Agenda for Tourism 2050”) towards a sustainable, innovative and resilient European tourism ecosystem. The European Tourism Convention was consequently held on 12 October 2020 (see Section III.1 for details).

The **European Parliament has in turn adopted a resolution on transport and tourism in 2020 and beyond (2020/2649(RSP))**⁸ on 19 June 2020 – welcoming the Commission’s communication and related guidelines as “the first necessary step” to support the recovery of the tourism and transport sector. The resolution also highlighted the importance of moving towards a “genuine European tourism policy” and regretted the absence of a dedicated budget line on sustainable tourism in the next multiannual financial framework (MFF 2021–2027) as well as the lack of concrete and targeted financial instruments to support the recovery of the tourist industry in the short-term.

⁸ *European Parliament resolution of 19 June 2020 on transport and tourism in 2020 and beyond (2020/2649(RSP))*, https://www.europarl.europa.eu/doceo/document/TA-9-2020-0169_EN.html.

In a similar vein, the **European Committee of the Regions (CoR) adopted an opinion titled “Towards more sustainable tourism for EU cities and regions”**⁹ on 10 December 2020 reminding about the importance of allocating sufficient financial resources to save the tourism sector in times of crisis and developing a “long-term European tourism policy.” The opinion specifically referred to and welcomed the European Commission’s tourism and transport package in the dedicated section on the EU’s short- and medium-term recovery and resilience response. However, with a view to long-term priorities and goals, the opinion highlighted the need to address the lack of sustainable transport alternatives and to increase support for sustainable mobility, to boost the supply of climate-neutral products in tourism, to address the problem of overtourism and data fragmentation and to improve the economic, social and environmental monitoring of tourism.

Emphasising the need to recognise tourism as a key EU policy, the European Committee of the Regions proposed to draw up a new European Sustainable Tourism Framework, in line with the European Green Deal and the UN 2030 Agenda, with a focus on digitalisation, smart tourist destinations, decarbonisation, circular economy as well as inclusive and accessible tourism. Moreover, CoR called the Commission to look into the possibility of setting up a directorate-general for sustainable tourism.

c) EU Strategy for Sustainable Tourism

On 25 March 2021, the European Parliament passed a resolution on establishing an EU strategy for sustainable tourism (**2020/2038(INI)**).¹⁰ The resolution was adopted by 577 in favour votes to 31 against and 80 abstentions and includes recommendations and demands towards the European Commission and member states along four strategic priorities:

- Rebuild: COVID-19 impact response plans;
- Refocus: governance policy within the Union framework;
- Strengthen: transition to sustainable, responsible and smart tourism;
- Rethink: planning the future of the tourism industry.

⁹ *Opinion of the European Committee of the Regions — Towards more sustainable tourism for EU cities and regions (2021/C 37/02)*, <https://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=CELEX:52020IR0303&from=EN>.

¹⁰ *European Parliament resolution of 25 March 2021 on establishing an EU strategy for sustainable tourism (2020/2038(INI))*, https://www.europarl.europa.eu/doceo/document/TA-9-2021-0109_EN.html.

While the resolution commended the Commission for organising the European Tourism Convention in 2020¹¹ and welcomed the launch of the Re-open portal,¹² it expressed regret over the fact that Next Generation EU did not include direct financing to the tourism industry. It underlined that support offered through the Recovery and Resilience Facility was not enough and called upon the Commission to create mechanisms to monitor the provision of support to micro enterprises and SMEs to ensure that funding was used to facilitate the implementation of innovative and sustainable projects.

In addition, the European Parliament asked the Commission to set up a European Agency for Tourism in the next Multiannual Financial Framework (MFF) and present an action plan for EU tourism in 2021 as well as to develop an EU strategy for sustainable and strategic tourism aligned with the Digital Agenda, the Green Deal and the UN Sustainable Development Goals. Moreover, the EP called upon the Commission to swiftly develop a roadmap for sustainable tourism, which would include measures to reduce the environmental impact of the sector and foster its digital transformation. Member states were called upon to devise national and regional sustainable tourism action plans in consultation with stakeholders and the civil society and in line with the future European roadmap for sustainable tourism.

d) Tourism in Europe for the Next Decade: Sustainable, Resilient, Digital, Global and Social

On 27 May 2021, the Council of the European Union issued its conclusion on Tourism in Europe for the next decade.¹³ The Council outlined the impact of the COVID-19 pandemic on the tourism ecosystem and noted that, according to the European Commission, it had the highest investment needs and the lowest confidence indicator. The Council also stressed the importance of addressing the needs of tourism SMEs and urged the EU and its member states to develop a coordinated response with a common cohesive approach in order to reduce uncertainties. In addition, the conclusions emphasised the importance of green and digital transformation as well as information and data exchange. The Council 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.

¹¹ *European Tourism Convention 2020*, <https://tourism-convention.eu/>.

¹² *Re-open EU*, <https://reopen.europa.eu/en>.

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>.

In more concrete terms, the European Commission was invited to launch a comprehensive overview of the existing funding sources for tourism in the MFF 2021–2027 and the Next Generation EU by September 2021.¹⁴ Further, it was invited to develop a specific approach within the existing financial framework with a particular focus on SMEs and support for the green and digital transition of tourism destinations. Finally, the conclusions envisioned the development of an EU Tourism Dashboard, as an EU flagship tool for the tourism ecosystem. A first outline of the dashboard should be presented by the end of 2021.

2. The EU Strategy for the Baltic Sea Region and Sustainable Tourism

a) The Revised EUSBSR Action Plan and Policy Area Tourism

On 17 February 2021, the European Commission approved the revised Action Plan accompanying the EU Strategy for the Baltic Sea Region (EUSBSR),¹⁵ thus completing the revision process, which was launched in 2018. While the revised plan preserves the three main objectives of the strategy – “Save the Sea”, “Connect the Region” and “Increase Prosperity” – it also considers emerging global challenges such as climate change, pandemics, demographic change and migration, lines up with the 2021–2027 Multiannual Financial Framework and accounts for the governance challenges of the EUSBSR. It streamlines the 14 Policy Areas (PAs) and mainstreams climate change and cooperation with non-EU countries as essential elements in all PAs. Furthermore, it reduces the overall number of actions making them more concise and fostering implementation through clarified roles and responsibilities as well as improved empowerment of stakeholders and increased ownership on one hand and more effective decision-making on the other.

Policy Area Tourism was preserved as one of the 14 PAs and was revised in intensive consultations with various stakeholders and through joint efforts of the Policy Area coordination team, the Steering Committee and the EU Directorate-General for Regional and Urban Policy (DG Regio). The PA is

¹⁴ *The Guide on EU funding for tourism, containing links to relevant EU programme websites, is available online under: https://ec.europa.eu/growth/sectors/tourism/funding-guide_en.*

¹⁵ *EUSBSR Action Plan 2021, <https://www.balticsea-region-strategy.eu/action-plan/17-action-plan/download>.*

coordinated by the Ministry of Economics, Employment and Health of Mecklenburg-Vorpommern, Germany, with Ms Andrea Krabbe acting as Coordinator.

PA Tourism contributes to reaching all three objectives of the EUSBSR by including actions aiming at saving the environment, increasing prosperity and connecting the region. By promoting the establishment of the Baltic Sea Region as a sustainable tourism destination it also contributes directly and indirectly to the achievement of the UN Sustainable Development Goals (SDGs), especially goals 8 (Decent Work and Economic Growth), 11 (Sustainable Cities and Communities), 12 (Responsible Consumption and Production), and 14 (Conservation and Sustainable Use of Seas and Oceans). Moreover, the revisions take stock of and tie back to existing EU and other policy frameworks such as the European Commission's "Tourism and Transport" package (May 2020), the New European Agenda for Culture of the EC (May 2018), the European Framework for Action on Cultural Heritage (December 2018), the Blue Growth Agenda, and the 2030 Agenda for Sustainable Development.

The Baltic Sea Tourism Center (BSTC), which the BSPC has strongly supported in its 25th and 26th resolutions, is highlighted as a key policy area achievement. Striving to reach its goal of becoming a central contact point for tourism in the Baltic Sea region, the BSTC has launched two report series ("State of the Tourism Industry" and "Trend Report"). These publications aim to inform stakeholders about trends and developments in the BSR tourism sector, devised practical workshops to provide tourism stakeholders with necessary tools and knowledge for better and more effective product development, and worked to better position and lobby the Baltic Sea tourism sector on the EU level.

The revised EUSBSR Action Plan features three new actions for PA Tourism:

- 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.

The actions are to be implemented within the 2020–2025 period and foresee the launch of two new flagships in 2021, whereas the BSTC remains a flagship project under Action 2.

The focus in Action 1 (**transnational tourism development in rural areas**) is laid on improving the accessibility, connectivity and attractiveness of rural destinations, mitigating seasonal fluctuations, promoting sustainable consumption and production, and contributing to the protection of biodiversity. Action 2 (**investing in people, skills and technology in the tourism industry**) seeks to address the challenges of the labour market,

improve relevant skills and competences, promote closer cooperation between different sectors and levels, develop studies for strategic decision-making, and foster the digital transformation of tourism SMEs. The supported activities in Action 3 (**protection and sustainable utilisation of cultural heritage and natural resources**) include improving the touristic infrastructure with a view to climate protection, fostering sustainable approaches to destination management, controlling and monitoring tourism flows with the help of digital technologies, and promoting respect for the socio-cultural authenticity of host communities.

While previous actions within PA Tourism focussed on facilitating cooperation and networking between tourism stakeholders and establishing the BSTC as a contact point in order to improve communication within the Baltic Sea region, the new actions are oriented towards promoting the BSR as a sustainable tourism destination with increased sensibility towards the environment, local communities and sustainable production and consumption.

b) EUSBSR Seed Money Projects 2020–2021 with a Focus on Sustainable Tourism

In 2020, three projects supported by PA Tourism were approved for EUSBSR Seed Money funding until September 2021. Seed Money is a funding instrument provided by Interreg Baltic Sea Region to support projects in line with the EUSBSR Action Plan. Overall, 37 projects were selected within the second Seed Money call in June 2020. The three tourism-related projects, with a total budget of 50 thousand euros each, include Baltic DigiTour, BalticBlueMarinas and RESTinBSR.

Baltic DigiTour¹⁶ involves five project partners from Germany, Poland and Finland and seeks to provide connectivist massive online courses for digitalisation in Baltic tourism attractions. The aim is to tackle the fast changing learning content in a knowledge community by focusing the collaboration of learners. The project analyses existing connectivist massive open online course models, IT platforms as well as needs of content matter experts and potential participants.

¹⁶ *Baltic DigiTour*, <https://projects.interreg-baltic.eu/projects/baltic-digitour-244.html>.

BalticBlueMarinas¹⁷ is carried out by six partners from Estonia, Finland, Poland, Sweden and Latvia and aims to capitalise the sustainable use of marinas as key actors of tourism destinations in the Baltic Sea region. Marinas are seen as separate entities in relation to other actors of the tourism sector, even if they are an essential part of the overall tourism package. The goal is to strengthen the cooperation between actors to foster growth, by integrating marinas into the regional tourism development and recreational boating with other tourism sectors.

RESTinBSR¹⁸ involves four partners from Lithuania, Latvia, Poland and Russia and is aimed at unlocking the potential of transformative ecotourism by involving new groups of actors, including rural entrepreneurs, local communities, NGOs and social movements dealing with ecology into the ecotourism development. The project seeks to develop a set of innovative tools for the promotion of transformative ecotourism businesses in the Baltic Sea region's peripheral areas.

c) Interreg South Baltic 2021–2027 and the Priority Axis “Attractive South Baltic”

In January 2021, the Interreg South Baltic Joint Programming Committee (JPC) adopted the **Strategy for the Interreg South Baltic Cross-border Co-operation Programme 2021-2027**.¹⁹ The strategy was prepared throughout 2020 and aims to support blue and green growth through cross-border cooperation between local and regional actors from Denmark, Germany, Lithuania, Poland and Sweden. The main proposed vision of the 2021–2027 programme is “Innovative, Sustainable, Attractive and Active South Baltic.” Consequently, the strategy identifies four priority Axes:

- Innovative South Baltic – enhancing the level of innovation and internationalization of local actors (Priority Axis 1),
- Sustainable South Baltic – promoting sustainable development and blue and green economy (Priority Axis 2),

¹⁷ *BalticBlueMarinas*, <https://projects.interreg-baltic.eu/projects/balticbluemarinas-246.html>.

¹⁸ *RESTinBSR*, <https://projects.interreg-baltic.eu/projects/restinbsr-226.html>.

¹⁹ *Strategy for the Interreg South Baltic Cross-border Co-operation Programme 2021–2021* (29 January 2021), https://southbaltic.eu/documents/18165/513661/2021-01-29_Strategy+for+the+Interreg+South+Baltic+Programme+2021-2027.pdf/f82fd004-7c9c-47a9-ac33-1c3d71014850.

- Attractive South Baltic – activating the tourist potential of the South Baltic Area (Priority Axis 3),
- Active South Baltic – improving governance cooperation (Priority Axis 4).

With a view to tourism being one of the most important branches in the South Baltic region and the urgent need for mitigating the negative effects of the COVID-19 pandemic on the sector, the strategy proposed that the programme allocates 25% of funding for projects aiming at the development of sustainable and innovative tourism products and services (Priority Axis 3). Within the Attractive South Baltic Priority Axis (PA 3), project should aim at:

- preserving the cultural heritage and natural environment of the region,
- developing network tourism offers and building cooperation between regions and countries,
- organising joint events for tourism providers and consumers,
- supporting the development of circular economy.

Public consultations on the **Template of the Interreg South Baltic Cross-Border Cooperation Programme 2021-2027**²⁰ have been launched on 8 September and will run until 15 October 2021. The programme template currently (as of September 2021) includes Programme Measure 3.1. “Developing sustainable, resilient and innovative tourism” within Priority Axis 3 (Attractive South Baltic) with a total contribution of 19 million euros. It also provides a list of exemplary actions to be supported within this measure. The focus here is on the development of:

- new tools supporting tourism network products and services, including ICT tools, marketing and the promotion of cultural and natural assets of the SBA,
- solutions and training for tourism and cultural sector,
- new tourist offers/small cross-border solutions that enhance sustainable tourism and meet the needs of tourists/citizens of the region (e.g. cross-border thematic routes)
- preservation of cultural heritage in the SBA: culinary heritage/history/language,
- marketing and promotion of cultural and natural assets/cultural heritage routes/eco-tourism/handcrafts/design,
- actions to protect the biodiversity and natural heritage of the SBA, including natural heritage sites and protected areas,
- adapting tourist’s offer to people with disabilities and activities aimed at social inclusion,

²⁰ *Template of the Interreg South Baltic Cross-Border Cooperation Programme 2021-2027*, https://southbaltic.eu/documents/18165/560475/2021-09-08_Interreg+South+Baltic+Programme+2021-2027_draft_template.pdf/0d5f5378-ec89-46e0-ab70-194335b169c5.

- sharing knowledge and best practices in the field of maintenance and revitalisation of cultural/natural heritage areas and establishing networks.

In the meantime, the **third Seed Money call for proposals of the Interreg South Baltic Programme 2014–2021** was announced on 13 September 2021 and will run until 5 November 2021.²¹ The call is open for proposals aiming to develop ideas for regular projects to be implemented and financed under the Interreg South Baltic Programme 2021–2027. A total of 100 thousand euros will be allocated for projects falling into Specific Objective 2.1. “Increased development of the South Baltic area’s natural and cultural heritage assets into sustainable tourist destinations.” Even though the selected projects will be funded under the Interreg South Baltic Programme 2014–2021, the Seed Money Facility seeks to stimulate the development of projects with a view to the 2021–2027 funding priorities. Both programmes include support for sustainable tourism projects in their priority areas.

3. Green Tourism as a Priority of the Lithuanian CBSS Presidency

The development of green and maritime tourism was identified as one of the priorities by the Lithuanian presidency of the Council of the Baltic Sea States (CBSS) in July 2020. As part of the planned activities within this priority area, Lithuania hosted the 13th Baltic Sea Tourism Forum on 12 November 2020 (see Section III.4. for more information on the event) and organised a high-level meeting of ministry representatives of tourism departments of the Baltic Sea states.

Furthermore, the Lithuanian CBSS presidency proposed to develop a renewed strategic vision for the Baltic Sea region until 2030. The Vilnius II Declaration²² was adopted by the foreign ministers and high-level representatives of the CBSS on 1 June 2021. Together with the declaration, the meeting also adopted an action plan,²³ which outlines the main activities and steps that the CBSS would implement in order to fulfil the vision agreed upon in the Vilnius II Declaration. One of the actions, aiming at building a “Sustainable and Prosperous Region,” includes the promotion of cooperation on clean shipping and

21 *Terms of Reference of the 3rd Seed money call for proposals*, <https://southbaltic.eu/documents/18165/561564/1.+3rd+Seed+money+TOR.pdf?0dec9f6-4e09-445c-a2b1-85cd3a6f8791>.

22 *CBSS Vilnius II Declaration, June 2021*, <https://cbss.org/wp-content/uploads/2021/06/vilnius-ii-declaration.pdf>.

23 *CBSS Action Plan, June 2021*, <https://cbss.org/wp-content/uploads/2021/06/cbss-action-plan.pdf>.

sustainable tourism and interactions between cruising companies, port infrastructures as well as harbours and marinas.

With a view to the Lithuanian presidency's focus on sustainable tourism, one of the six projects selected for funding through the **CBSS Project Support Facility (PSF) in 2020–2021** focussed on “Youth Networking for Sustainable Tourism Development in the Baltic Sea Region.” The Sustainable Tourism Excellence Network for Youth (STENetY)²⁴ was developed within the framework of the project as a platform for youth cooperation, awareness raising and exchange on sustainable tourism development in the Baltic Sea region. One of the aims of the project was to promote international youth communication and elaborate a Baltic Sea Region Tourism Vision 2030. The best ideas were awarded at the second International Youth Tourism Forum, which took place online ahead of the Day of Europe on 7 May 2021. The forum titled “Quo Vadis Tourism? COVID-19 Impact on the Role of Sustainability in Tourism” was organised by the Lithuanian Ministry of the Economy and Innovation in cooperation with Klaipeda University and was welcomed by the Vice-Minister of the Economy and Innovation of the Republic of Lithuania, Mr Vincas Jurgutis, and the CBSS Senior Adviser for Sustainable & Prosperous Region, Ms Daria Akhutina. During the forum, young people had a chance to hear presentations from the representatives of UNWTO, the European Travel Commission, business and research. The winners of the Tourism Vision 2030 competition were invited to participate in the first Global Youth Tourism Summit organised by UNWTO on 23–25 August in Sorrento, Italy. All ideas on promoting more ecological and sustainable tourism submitted by young people for the competition are available on the eBox page of the STENetY platform.²⁵

Moving forward, in June 2021, the CBSS announced the projects selected for **PSF funding in 2021–2022**.²⁶ One of the eight approved projects will focus on “Building Resilient and Inclusive Sustainable Maritime Tourism in the Baltic Sea Region.” The project aims at creating a multi-stakeholder communication platform to promote exchange on and the development of a cross-Baltic maritime tourism infrastructure. The project would deliver reports analysing the current situation and developing solutions and recommendations for decision makers.

24 Sustainable Tourism Excellence Network for Youth (STENetY), <https://stenety.com/>.

25 Sustainable Tourism Excellence Network for Youth (STENetY), eBox, <https://stenety.com/ebox/>.

26 CBSS News: Eight projects selected for PSF funding 2021, 22 June 2021, <https://cbss.org/2021/06/22/eight-projects-selected-for-psf-funding-2021-2022/>.

III. Meetings and Events

1. European Tourism Convention 2020, 12 October 2020

The aim of the European Tourism Convention 2020 held online on 12 October 2020 was to launch a comprehensive dialogue among stakeholders on the immediate recovery steps in light of the COVID-19 pandemic and the strategic orientation for European tourism of tomorrow. The Convention was organised in two distinct sessions, with three parallel thematic workshops, aiming to propose actions for a European tourism roadmap, and a plenary session hosted by European Commissioner for Internal Market, Mr Thierry Breton. During the plenary, workshop participants presented the discussed actions towards a European Plan for Tourism Recovery. In addition, the plenary session featured three panel discussions and four fireside chats with politicians, experts and stakeholders, who provided valuable input on short-term recovery and long-term priorities for the European tourism ecosystem.

The three parallel thematic workshops gathered approximately 100 representatives of EU institutions, national and regional authorities, sectoral associations and the tourism and travel industry, international organisations, academic and research institutions, NGOs and other relevant stakeholders. The workshops addressed three key issue areas to pave the way towards a European Agenda for Tourism 2050: safe and seamless tourism experience, greener holidays as well as tourism powered by data. Participants were asked to discuss the challenges and opportunities and draw up a list of practical ideas and solutions for the tourism sector of tomorrow.

Consequently, the participants of the session on safe and seamless tourism experience highlighted three actions, which in their opinion were of primary importance:

- to develop multimodal, low-carbon transport and connectivity across EU destinations through coordinated responses to technical, institutional, and financial issues,
- to ensure the implementation and alignment of efficient health and safety protocols across Europe,
- to ensure smart management of tourism flows/crowds for tourism development in destinations focused on equality rather than volume.

During the workshop on greener holidays, stakeholders pointed towards the need for such priority actions as:

- to build a Marshall Plan to finance the destinations' transition towards sustainable tourism and adaptation to climate change,
- to empower tourism SMEs and destination management and marketing organisations with innovative capabilities, financial instruments, and legal frameworks,
- to incentivise the transition to climate-neutral EU tourism (e.g. voluntary standards, regulations, and financial instruments for resource-efficiency innovations).

The session on tourism powered by data, in turn, identified the following priorities:

- to enhance data skills within tourism administrations at all levels of governments and SMEs,
- to make funding available and increase awareness of funding opportunities available to tourism enterprises to help them become digital, also including training opportunities,
- to make tourism data (official statistics and big data) more easily sharable and integrable via application program interfaces (IPAs).

The key message delivered by all three workshops was the need for more collaborative and coordinated action among all tourism actors. The pandemic was certainly perceived as a turning point, but it also had the potential to bring the tourist industry together. Such themes as investment in people through upskilling and reskilling as well as more effective governance mechanisms for incentives but also regulations were raised and discussed in all three workshops showing their significance for the participants. In his closing speech, the European Commissioner for Internal Market, Mr Thierry Breton, underlined the urgency to act immediately for the sake of the tourism industry as well as the need for good governance to create a new tourism ecosystem of tomorrow involving all the different actors and stakeholders.

2. “Tourism Recovery through Cooperation” Workshop, 14 October 2020

The macro-regional strategy workshop on tourism recovery through cooperation was organised within the framework of the European Week for Regions and Cities 2020 and attended by EUSBSR PA Tourism. The workshop focussed on how cooperation within the framework of the EU macro-regional strategies (MRS) could help countries to tackle the challenges caused by the pandemic and promote the sustainability of tourism businesses, destinations and communities in a harmonized way.

Representatives of DG TRAN and the Organisation for Economic Co-operation and Development (OECD) presented the challenges and impacts of the COVID-19 pandemic on the EU tourism sector, highlighting an unprecedented reduction in international arrivals, aggravated by a massive drop in intra-EU and domestic tourism. Further, speakers from the Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs (DG GROW), MRS coordinators, sector experts as well as representatives of UNTWO and the Routes4U project provided an overview of key EU policies as well as national, regional and local measures and actions taken in order to support the tourism industry in the context of the pandemic.

Workshop participants discussed how macro-regional strategies, through their governance mechanisms, could become successful platforms to facilitate tourism recovery exchange, continuity and process among participating countries. For this purpose, an expert study on cooperation in the tourism industry during the pandemic crisis was launched in order to explore the impact of the crisis on the EU macro-regional tourism activity and to offer a number of recommendations for tourism cooperation contributing to the recovery measures. The expert advice focussing on the impact assessment analysis for the four macro-regional strategies was issued ahead of the workshop in July 2020.²⁷ The study underlined that in the context of the pandemic, countries would mostly rely on domestic tourism, while tourism flows between MRS-states and -regions would be limited. Consequently, the study advised that communication between MRS participating countries should focus on expanding the notion of domestic tourism so as to boost interregional tourism between neighbouring states. In addition, it highlighted the need for improved market intelligence and establishing MRS task forces with a view to crisis management. The European Commission was advised to examine the ways to restart tourism in a sustainable way making use of such existing financial instruments as the European Regional Development Fund (ERDF), the European Social Fund (ESF), the European Neighbourhood Instrument (ENI) as well as Horizon Europe, Erasmus, etc.

During the workshop, two EU Cohesion Policy's objectives focussing on Europe closer to citizens and Greener Europe were identified as the most relevant one for the tourism industry. Participants signalled their readiness to contribute to green transition and the development of new tourism products/cultural paths, new skills and training. They also acknowledged that macro-regional cooperation could play a key role in managing the crisis in tourism while contributing to new pan-European tourism models. Major political priorities should be to harmonise tourism information for travellers about destination service

²⁷ *Expert advice on cooperation in the tourism industry during the pandemic crisis, July 2020*, <https://www.adriatic-ionian.eu/wp-content/uploads/2020/09/The-impact-assessment-analysis-for-the-four-Macro-regional-strategies-ES.pdf>.

availability. Some of the recommendations of the study were seen as especially useful for the establishment of future inter-macroregional tourism cooperation. These included capitalising on the lessons learned from the Interreg best practice projects, bringing the public and private sectors closer and helping to disseminate new tourism models and skills, based on social distancing.

3. The 19th European Tourism Forum, 23 October 2020

On 23 October 2020, the German presidency of the Council of the EU, in cooperation with the European Commission, hosted the 19th European Tourism Forum. The event gathered more than 200 participants from EU member states, the business community and academia to discuss the future prospects for the tourism sector and ways to recover from the coronavirus crisis and to develop a robust tourism industry. The event was chaired by Mr Thomas Barieß, Parliamentary State Secretary at the Federal Ministry for Economic Affairs and Energy, Federal Government Commissioner for Tourism and for Small and Medium-Sized Enterprises. Ahead of the forum, Mr Barieß underlined the need for creating trust in the politically implemented safety measures, for supporting the travel and tourism sector, for securing jobs as well as providing prospects and outlooks for the future.

The forum discussions were organised along three central themes:

- overcoming the impact of COVID-19 – ensuring the revival of world-leading European tourism: trust and predictability as essential elements of a successful tourism sector,
- maintaining basic tourism structures – the industry takes stock of the 2020 summer season: lessons learned and fields of action,
- recovery and prospects for European tourism.

The event was attended by Mr Zurab Pololikashvili, Secretary-General of the UN World Tourism Organization, Ms Cláudia Monteiro de Aguiar, Member of the European Parliament and member of the Committee on Transport and Tourism, and was addressed by Mr Thierry Breton, EU Commissioner for Internal Market, via video message. In addition, representatives of the European tourism industry were invited to share their experience and present innovative solutions to tackle the COVID-19 crisis.

Concerning the future development of the tourism sector Mr Thomas Barieß underlined the need to consider policies for the time when safe travel in Europe would be resumed. He also stressed that if tourism

in Europe were to remain the world leader on a long-term basis, small and medium-sized enterprises in particular would need to address the challenges of ongoing digitalisation. It would thus be vital to develop new business models.

4. The 13th Baltic Sea Tourism Forum, 12 November 2020

Similar to other events that were held under the unprecedented conditions of the COVID-19 pandemic, the 13th Baltic Sea Tourism Forum under the title “Reviving tourism in times of global change” was organised as a digital conference for the first time in its more than decade-long history. The aim of the virtual international forum was to discuss ways of reviving tourism in the region by promoting it as an attractive, sustainable travel destination and introducing innovations that could support tourism recovery.

The forum was addressed by Mr Rimantas Sinkevičius, Minister of the Economy and Innovation of the Republic of Lithuania, Mr Zurab Pololikashvili, Secretary-General of UNWTO, Mr Eduardo Santander, Executive Director of the European Travel Commission, Mr Grzegorz Poznanski, Director General of the CBSS Secretariat, Mr Neris Germanas, Vice Minister of Foreign Affairs of the Republic of Lithuania, and Mr Šarūnas Vaitkus, Mayor of Palanga.

In two sessions, representatives of EU and government institutions, tourism industry and academia discussed issues and prospects revolving around the future of transnational cooperation on one hand and rethinking tourism on the other.

The first session on **the future of transnational cooperation** was opened by Ms Anna Athanasopoulou from the Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs, who delivered five central messages on the future prospects for the European tourism industry. First, she stressed that the tourism sector was of great economic importance for the EU. Second, she pointed out that the pandemic has had a dramatic impact on the sector, putting businesses at risk and hitting SMEs particularly hard. Third, she outlined the EU’s response to the crisis, specifically stressing the opportunities provided by the SURE program, Next Generation EU, the Coronavirus Response Initiative and referring to the European Commission’s “Transport and Tourism” package from May 2020. Fourth, Ms Athanasopoulou underlined that in the aftermath of the crisis special focus would lie on green and digital transformation. The Recovery and Resilience Facility set the following priorities: power-up, renovate, recharge and refuel, connect,

scale up, modernise, upskill/reskill. States were expected to submit their national recovery plans that should address investments in these particular areas. At the same time, inter/national and inter-regional cooperation was extremely important. Fifth, she emphasised that financial tools were not enough. Europe needed a vision on how to restart and transform the tourism ecosystem. In this context, she referred to the European Tourism Convention 2020 and the ongoing work on the European Agenda for Tourism 2050. Despite the different views expressed at the Convention, there was a certain deal of convergence on three central topics: effective governance, better coordination and the need for more cooperation on all levels. At the end of her presentation, Ms Athanasopoulou admitted that the pandemic had brought a big disruption to the industry but also noted that it could pave the way for a greener and safer future.

The second speaker, Mr Mats Jansson from Region Gotland in Sweden, focussed on local experiences in dealing with the COVID-19 crisis. He reported that due to the pandemic Gotland lost approx. 90% of international arrivals, but only 35% of arrivals by boat, since the majority of visitors came from Sweden. He underlined that SMEs suffered the most and noted that the authorities tried to support businesses by providing information and establishing collaborative platforms in an effort to maintain an open and transparent discussion with companies. Looking beyond the crisis, Mr Jansson highlighted that Gotland would keep following the priorities of its sustainability strategy until 2027, which focussed on new skills, digital transformation and innovative business models. In terms of international cooperation, he stressed the need for common criteria, guidelines and codes of conduct for both travellers and residents on the European level.

The second session dedicated to the **future prospects of tourism in the Baltic Sea** region featured seven speakers from six different Baltic coastal states. They presented their perspectives and approaches and exchanged views in the panel discussion that followed.

In the beginning, Ms Susanne Marx from the Stralsund University of Applied Sciences posed the question whether domestic travel was becoming the new normal against the backdrop of the pandemic-induced travel restrictions and limitations, but also reminded that the role and significance of domestic tourism varied across the Baltic Sea states. Thus, Ms Marie Zürnstein from the Mecklenburg-Vorpommern Tourist Board shared that 97% of tourists coming to Mecklenburg-Vorpommern, Germany, were domestic visitors. She noted that tourism acceptance within the population was one of the major challenges in the beginning of the pandemic. In contrast, in Lithuania, 53% of tourism arrivals were domestic, as reported by Mr Dalius Morkvėnas, CEO of Lithuania Travel. In the 2020 summer season, domestic travel increased and the tourism marketing strategy was adjusted accordingly. However, the loss of international visitors had sharply affected cities, which previously relied on foreign travel as international

travel destinations. Ms Liina Maria Lepik, Director of the Estonian Tourist Board, confirmed that such cities as Tallinn, Pärnu and Tartu have experienced similar problems, but told that Estonia had managed to organise a number of international events and partly compensate for the pandemic-induced losses. She also stressed that communication between the authorities and the tourism sector had been essential during the crisis – especially with a view to support for new business models and developing visions for the future. Ms Caroline, CEO of Visit Stockholm, in turn told about the challenges faced and initiatives developed by the Swedish capital, such as “The Stockholm Commitment” – an initiative to promote conversation and dialogue between citizens and companies or “United We Stream Sthlm” to contribute to the survival of the Stockholm night and club scene. Finland also experienced a rise in domestic travel during the pandemic, as confirmed by Ms Ida Honkanen from the Ministry of Economic Affairs and Employment of Finland. Ms Honkanen listed a number of trends in domestic tourism, such as cottage holidays, camping, hiking, and other outdoor activities, but noted that domestic tourists tended to spend less money during vacation and relied more on individual planning rather than commercial services. Ms Marta Chelkowska, Director of the Tourism Department of the Marshal’s Office of the Pomorskie Voivodeship, shared her observation that the pandemic had increased online activities, cycling mobility, shifted the focus from major international tourism towards rural and nature travel and transformed guest preferences in relation to the choice of destinations. At the same time, she emphasised the need to “stand together and stand by the industry.” She underlined that although preferences had shifted towards domestic tourism, international tourism within the Baltic Sea region would eventually resume.

The discussion that followed highlighted the need for regional cooperation, increasing openness and raising trust for the time after the pandemic. Even though domestic travel had increased in many countries and regions, it could not compensate for the loss of international and business travellers.

In the follow-up, Prof. Dimitrios Buhalis, Director of the eTourism Lab and Deputy Director of the International Centre for Tourism and Hospitality Research at Bournemouth University Business School in England, talked about **smart tourism as a path for recovery from the COVID-19-related crisis**. He pointed towards the long-term effects of the pandemic, such as global recession, mental health issues and economic downturn, and emphasised that it was necessary to start a discussion about responsibility and leadership rather than growth. He also suggested that there would be no return to the past and that the future would be different, more oriented towards mobile, smart systems and user-generated real-time information. Prof. Buhalis named tracing and tracking technologies, robotics, self-driving and also gamification of tourism among the future trends, which were emerging presently, and stressed that countries and people should engage in the co-creation of value. In the following Q&R session, Prof. Buhalis was asked, whether the shift from mass to individual tourism was already happening. He responded by saying that a

discussion about this shift was premature, since many consumers could not afford individual tourism, yet one should still discuss the sustainability of mass tourism and search for ways to increase it. However, he also noted that sustainability did not only relate to the environment, whereas technology and smart systems could indeed be used for enhancing it in the future.

In conclusion of the forum, Ms Anne Vollerthum from the Mecklenburg-Vorpommern Tourist Board observed that while the pandemic had brought many changes to established processes, it had also taught people to become more adaptive and listen to one another. Because when one listened, one was able to learn new things. She referred to the First Baltic Sea Region Sustainable Tourism Award and stressed that it showed that businesses were already introducing innovative sustainable concepts and models. The forum itself provided insights on what authorities and companies were doing to tackle the COVID-19 crisis, but also on the visions for the future.

The next day, on 13 November 2021, a **high-level meeting of ministry representatives of tourism departments of the Baltic Sea States** dedicated to tourism recovery measures took place as part of the forum. Ministry representatives admitted that although the pandemic has hindered cooperation among the Baltic Sea states, it also explicated the importance of exchanging knowledge, best practices and solutions as well as learning from each other's experiences. They shared the lessons learned during the 2020 summer season, which was characterised by a brief opening between the first and second waves of the pandemic. The participants of the high-level meeting also exchanged views on the future vision and strategic long-term planning process as well as on short-term measures aimed to secure jobs and save businesses in the tourism industry and other interdependent sectors as well as to ensure safety for people and the society.

The meeting underlined that the crisis could pave the way for new solutions in tourism services. It could potentially accelerate such already exiting trends as digitalisation and transformation towards sustainability. The high-level representatives unanimously agreed that cross-sectoral cooperation at the national, regional and transnational levels in the BSR was of vital importance striving to provide effective support for resilience and a speedy recovery of travel in the region.

5. The First Baltic Sea Region Sustainable Tourism Awards

For the first time in its history, the Baltic Sea Tourism Forum featured a ceremony for the Baltic Sea Region Sustainable Tourism Awards. The competition aimed at honouring the achievements of regional players and enterprises in the field of sustainable tourism development and promotion as well as acknowledging the efforts to transform the tourism industry during and after the COVID-19 pandemic. The awards were given in three categories: the most sustainable destination, the most sustainable product and exceptional services, as well as the most sustainable tourism service provider (business). Approximately 30 businesses, organisations and service providers from Denmark, Estonia, Finland, Latvia, Lithuania, Poland and Sweden have submitted their applications following an open call released in September 2020.

The winners were picked by an international panel of experts from the CBSS, Estonia, Finland, Germany, Latvia, Lithuania, Poland and Sweden. The awards were organised by Policy Area Tourism of the EU Strategy for the Baltic Sea Region (EUSBSR), the Baltic Sea Tourism Center (BSTC), in close cooperation with the Tourism Policy Division of the Ministry of the Economy and Innovation of the Republic of Lithuania.

The awards ceremony took place on 11 November 2020 ahead of the 13th BSTF and was addressed by the Director General of the CBSS Secretariat, Mr. Grzegorz Poznański, who noted that sustainability should not only guide the way out of the crisis, but also show the way for the future. He expressed his hope that the award would become a tradition to showcase and praise best regional practices in the area of tourism sustainability. The winners in all three categories are listed below.²⁸

Winners in the “Most sustainable tourist destination” category:

1. Pärnu City, Estonia (Pärnu City Government)
2. Saaremaa, Estonia (Visit Saaremaa, Saaremaa municipality)
3. Valdemarsvik, Sweden (Valdemarsvik Municipality)

²⁸ CBSS Press release: *The First Baltic Sea Region Sustainable Tourism Award Winners: Denmark, Estonia, Finland and Sweden among most Sustainable*, <https://cbss.org/2020/11/11/press-release-the-first-baltic-sea-region-sustainable-tourism-award-winners-denmark-estonia-finland-and-sweden-among-most-sustainable/>.

Winners in the “Most sustainable product or service” category:

1. Sinatur Hotel & Konference, Denmark
2. Aavameri Sea Kayaking, Finland
3. Do the North, Sweden

Winners in the “Most sustainable tourism services provider” category:

1. Aavameri Sea Kayaking, Finland
2. Herrankukkaro Oy, Finland
3. Marcus Eldh, Sweden

In addition, the Palanga Municipality established a special prize for the most interesting application, which was awarded to Lithuanian Countryside (Lithuanian Countryside Tourism Association).

All winners were given oak tracery prizes specially created for the event by Lithuanian designer Mr Linas Ambrasūnas and depicting the Baltic Sea and the outlines of surrounding countries in the region. The sustainable tourism logo was designed for the Baltic Sea Region Sustainable Tourism Awards by Ms Lina Šipalytė-Valytė.

The **Baltic Sea Parliamentary Conference** congratulates the winners and thanks the organisers and participants of this first of its kind event, hoping that the Baltic Sea Region Sustainable Tourism Awards would become a permanent platform for supporting and initiatives and achievements in sustainable tourism development in the future.

6. Meeting of the Maritime Working Group of the CPMR Baltic Sea Commission, 10 March 2021

On 10 March 2021, the Maritime Working Group of the Conference of Peripheral Maritime Regions (CPMR) Baltic Sea Commission held an online meeting to discuss future policy priorities and share regional experiences to promote recovery and sustainable tourism around the Baltic Sea region. Chaired by Tiina Perho (SouthWest Finland) and supported by Vice-Chair Harry Bouveng (Stockholm Region), the meeting gathered around 30 participants and welcomed guest speakers from the European Commission as well as regional businesses and institutions.

Participants took the opportunity to discuss and develop a new Action Plan for the Maritime Working Group, which outlined policy priorities for 2021–2023. Among the key priorities identified by the member regions were the promotion of sustainable maritime industries and coastal tourism in the Baltic Sea Region. Within the first policy priority, specific focus was placed on the development of maritime skills, the ship building industry, sustainable blue economy, small-scale fishing and improving the state of the Baltic Sea environment. In regard to coastal tourism, emphasis was placed on supporting investments in and the development of sustainable tourism in the BSR, helping regions to support the recovery of the tourism sector and encouraging the transition towards more sustainable forms of tourism in the region. The Action Plan also outlined the missions of the Working Group. These included monitoring relevant policy developments, encouraging and fostering the exchange of knowledge and best practices, promoting the interests of BSC member regions – also in communication with EU institutions, and generally serving as a platform for project development with a view to funding opportunities provided for the members of the BSC.

During the meeting, representatives from Visit Stockholm as well as the Oulu and Gotland regions presented their experiences in promoting and supporting sustainable tourism development against the backdrop of the COVID-19 crisis. After that, Ms Ramune Genzbigelyte-Venturi, Policy Officer Tourism at DG Internal Market, Industry, Entrepreneurship and SMEs, European Commission, provided an outlook on EU support to the tourism industry in light of the pandemic. She outlined the immediate goals of the Commission's response, which included protecting businesses and jobs in tourism, providing real-time information to citizens (e.g. through the online platform Re-open EU), restoring confidence in travel and monitoring the impact of the crisis on the industry in general and consumer behaviour in particular. The long-term priorities identified by the European Commission were focussed on increasing economic and social resilience, promoting green tourism and sustainability, digital transformation and investment in skills. Ms Genzbigelyte-Venturi also referred to the European Tourism Convention 2020,

which aimed at launching a discussion on the European Agenda for Tourism 2050. Afterwards, Ms Rebecka Frej, National Contact Point Sweden North, Interreg Central Baltic programme, summarised the main priorities of the new Central Baltic Programme 2021–2027. These included innovative Central Baltic business development, improved environment and resource use, more accessible and inclusive labour market and improved public services and solutions for citizens.

Furthermore, Dr. Marta Jacuniak-Suda representing the Office for Regional Development Weser-Ems, Niedersachsen, Coordinator for Focus Area 3 Circular use of resources in the CPMR/North Sea Commission Smart Regions Group, presented a recent report on the ways of adapting to the COVID-19 pandemic in the North Sea Region. The report summarised key findings with a view to the impact of the pandemic on tourism organisations, institutions and businesses, adopted measures and solutions, expectations from the governments as well as lessons learned for the future. Based on these findings, the report offered recommendations both for the hospitality and cultural sectors as well as for decision makers. The latter primarily emphasised transparent regulations and improving communication across different governance levels, increasing funding in order to compensate for the suffered losses, supporting digitalisation, encouraging responsible travel and supporting sustainable tourism offers while ensuring affordable accommodation for local residents.

In conclusion, Ms Andrea Krabbe, Policy Area Tourism, sketched out the priorities in relation to the tourism sector in the new Action Plan of the EUSBSR (see Section II.2.a. for details).

7. EMD Maritime Sustainable Coastal Tourism Workshop, 21 May 2021

On 21 May 2021, the CPMR, together with its Geographical Commissions, organised a workshop titled “Sustainable Tourism: Key Actions Towards a Smart and Resilient Recovery” as part of this year’s European Maritime Day (EMD). The workshop took place virtually and gathered over 500 participants to discuss actions to support a smart and sustainable recovery of the tourism sector with a focus on sustainable and coastal tourism.

The workshop was moderated by Jeremy Sampson, CEO Travel Foundation, a non-profit based in Bristol, UK, which cooperates with tourism destinations and businesses. The workshop included presentations by Mr Francesc Mateu representing the Balearic Islands Agency for Tourism (AETIB), Prof. Stephen

Hynes representing Failte Ireland, the National Tourism Development Authority of Ireland, Mr Mamuka Berdzenishvili from the Tourism Institute of Georgia, Mr Mats Jansson from Region Gotland and Ms Marie Linde from the West Sweden Tourism Board. During the workshop, tourism experts from different sea basins identified common themes and challenges, which included:

- low wages and job insecurity due to seasonality of tourism and rising competition (e.g. addressed by Interreg Mediterranean Winter Med project),
- environmental pressures such as droughts and scarcity of water,
- complaints of local population about overtourism,
- the necessity of moving from volume to value, understanding the real costs of tourism (with a view to the impact on the environment, protection of resources, provision of infrastructure, waste management, etc.),
- the use of technology/big data in order to identify key barriers for change and promptly allocate funds to areas, which require them most,
- the need for skills development and cooperation at different levels.

Participants also identified several key priorities for action: better policy coordination, holistic approaches to understanding tourism impacts, new performance indicators/exchange of data for green and circular economy, development of a transnational strategy to foster cooperation, investing in mature tourist destinations and facilitating the modernization of all sectors linked to tourism.

With a view to the Baltic Sea Region, Mr Mats Jansson, tourism business strategist from Region Gotland, outlined the key elements for recovery in the Baltic Sea Region. He noted that the pandemic had a severe impact on island tourism with Gotland having experienced a 40% reduction of visitors in 2020. He stressed that ferries were an important gateway, but it was crucial to ensure the safety of voyage and destinations. In the course of the pandemic, many SMEs had to search for and employ new communication methods, new business models and develop new tools in order to ensure survival. For sustainability, it was crucial to foster exchange between research, private and public actors. Region Gotland had introduced a new strategy for tourism development, which concentrated on ensuring stable tourist flows throughout the year. It included three thematic areas: food and drink, outdoor activities, nature and culture. Three projects had already started. Mr Jansson noted that e.g. a project in the domain of food and drink involved 30 actors/entrepreneurs, who worked with local actors to achieve change and try to create good examples for other companies around the region.

Mr Jansson stressed that recent developments required looking at the new normal in tourism with new eyes. It was essential to consider new markets, concentrate on interest groups along with target groups and keep in mind that different stakeholders/sectors had varying views on sustainability. He emphasised the importance of data-driven information. At the same time, digitalisation included all aspects of business development, including cooperation, marketing and sales. The EU was planning to allocate resources to support the development of digitalisation in the upcoming years. This would also require cooperation and exchange on all levels. Companies would search for better communication tools and better ways of working with social media. Cooperation between the private sector and research institutions also offered new opportunities. Thus, Mr Jansson mentioned Uppsala University, which had a campus on the island and a master program on sustainable tourism development. Digital solutions could also foster cross-border cooperation and create attractive offers that would draw visitors to the Baltic Sea.

In May 2021, the **CPMR Baltic Sea Commission issued an official draft of the resolution**²⁹ to be approved by the General Assembly on 23 September 2021. The resolution draft calls, among other things, for a **smart and resilient recovery of coastal tourism and the maritime sector** in the Baltic Sea region. It expresses concern over the major impact of public health measures in response to the COVID-19 pandemic on tourism in the maritime regions of the Baltic Sea area and emphasises the need for a holistic approach and multi-level cooperation between the public sector, businesses, research and civil society. It also calls for accelerating the transition towards sustainable tourism in the post COVID-19 context. The resolution places specific emphasis on the use of new digital tools, private and public collaboration, as well as upskilling to support the need for adaptation and diversification.

²⁹ Official Draft – Baltic Sea Commission Resolution 2021, May 2021, https://etc-corporate.org/uploads/2021/07/ETC_Quarterly_Report-Q2_2021.pdf.

IV. Prospects and Outlook

The tourism and travel sector remains and will remain heavily dependent on the regulations and restrictions in connection with the developments in the pandemic situation. The latest report “European Tourism: Trends and Prospects (Q2/2021)” produced for the European Travel Commission describes the following recent trends in tourism consumer behaviour: domestic travel with longer-term stays, shorter booking windows, focus on local nature and outdoor experiences and “safety first” mind-set.³⁰ The report notes that these trends would likely remain in place in the near future. The pandemic has put severe pressures on the industry, yet it has also prompted intense reflections and discussions about future priorities, new models and tools to address current and emerging challenges.

The European Tourism Convention 2020 became an important platform for an exchange of views about the strategic development of the European tourism sector until 2050. In March 2021, the European Parliament called upon the European Commission to develop a roadmap for sustainable tourism, whereas in May 2021, the Council of the European Union called upon the Commission and member states to present the first outline of the European Agenda for Tourism 2030/2050 by the end of 2021. In addition, a first outline of an EU Tourism Dashboard should be presented by the end of 2021. Even though the years 2020–2021 have been marked by intensive elaborations and political debates on the future of sustainable tourism in Europe, neither the Multiannual Financial Framework 2021–2027, nor the Interreg 2021–2027 Programme does not have dedicated budget lines. Although funding for relevant projects contributing to multiple policy objectives in the areas of cohesion and regional development is available through the instruments of the MFF and Next Generation EU, the absence of targeted financial tools for sustainable tourism is regretful.³¹

As for the Baltic Sea region, a number of ongoing projects are currently supported through the CBSS Project Support Facility and EUSBSR Seed Money 2020–2021. The third Seed money call for proposals of the Interreg South Baltic Programme 2014–2020 announced in September 2021 is open for projects aimed at the development of the South Baltic area’s natural and cultural heritage assets into sustainable tourist destinations. Additionally, the Template of the Interreg South Baltic Cross-Border Cooperation Programme 2021–2027 currently undergoing public consultations has a dedicated line for activating the tourist potential of the South Baltic area.

³⁰ European Travel Commission, *European Tourism: Trends & Prospects, Quarterly Report (Q2/2021)*, https://etc-corporate.org/uploads/2021/07/ETC_Quarterly_Report-Q2_2021.pdf.

³¹ In May 2021, the European Commission published a web-based Guide on EU funding for tourism 2021–2027 (https://ec.europa.eu/growth/sectors/tourism/funding-guide_en). The guide contains a list of funding schemes relevant for the tourism sector as well as information on eligibility and application requirements.

Sources and Useful Links

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Abbreviations

BSP	Baltic Sea Strategy Point
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 Regio	Directorate-General for Regional and Urban Policy
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
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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