



OPERATIONAL CBC NAUTICAL TOURISM DEVELOPMENT PLAN

Italy, Albania and Montenegro



Municipality of Molfetta



Municipality of Termoli



PORT HEDGE NOVI

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1 INTRODUCTION

The present study aims to provide a framework upon which decision making related to strategies and plans for the tourism industry can be made. This document will act as a point of reference for authorities support informed decision and planning. It provides summary and analyzes the internal and external factors that may affect Nautical Tourism development in the Entire Intervention Area. Such analysis may provide a comprehensive review of the development potentials in the reference territory. Moreover, it delivers recommendations on future goals and potential objectives in regards to the development of the tourism sector of the area with a focus on Nautical Tourism.

In the following chapters, are presented the methodological framework upon which this study was conducted, the database of the area of interest, the analysis on the trends and tendencies of the tourism sector in the area, the development objectives and the suggested actions to lead to those objectives and a section about the potential impacts of such changes in the area.

It is worth mentioning that the present document acquires added value when used a tool in tantum with the other studies produced in the context of the REGLPORTS projects, i.e., the Current Situation Analysis, the Thematic Routes study and the SWOT analysis. Together, those provide an incredibly detailed insight on the area of interest, giving the reader easy access to assess the current conditions of the sector, the potential for development, the advantages and disadvantages that the area provides and much more.

2 IMPLEMENTATION ENVIRONMENT

2.1 The Interreg IPA CBC Italy – Albania - Montenegro Programme

The Interreg IPA CBC Italy-Albania-Montenegro Programme, co-funded by the European Union through the Instrument for Pre-Accession (IPA II), has a total budget of 92.707.558,00 euro (including 15% national co-financing). The Programme is managed by Puglia Region, which participates together with another Italian Region, Molise; Albania and Montenegro participate with the entire territory. The objective is to promote economic growth and to intensify cooperation in the low Adriatic area, by implementing joint actions between national and regional institutional and non-profit actors and by fostering smart, inclusive and sustainable development.

More specifically, the overall Programme budget is EUR 92.707.555, with a Union Support of EUR 78.801.422. The financial allocation to the chosen thematic objectives reflects the estimated financial size of actions foreseen in each priority axis, the coherence with the funding priorities as in the EC Country Position Paper and in the EC Indicative Strategy Papers, the strategic choices of the Programme stakeholders, as well as the inputs provided by relevant partners within consultations. Additionally, not less than 50% of total amount of the financial resources shall be reserved for thematic calls and strategic projects.

The Program Priority Axis are:

- **PRIORITY AXIS 1. Strengthening the cross-border cooperation and competitiveness of SMEs.**
- **PRIORITY AXIS 2. Smart management of natural and cultural heritage for the exploitation of cross border sustainable tourism and territorial attractiveness.**
- **PRIORITY AXIS 3. Environment protection, risk management and low carbon strategy**
- **PRIORITY AXIS 4. Increasing cross border accessibility, promoting sustainable transport service and facilities and improving public infrastructures.**
- **PRIORITY AXIS 5. Technical Assistance.**

2.2 The REGLPORTS Project

Nautical Tourism (NT) is a dynamically expanded form of tourism, consisting an industry of high added value with strong clientele growth tendencies in the Adriatic Sea. In general, NT is seasonal, however, if combined properly with other mild tourism activities it may be prolonged with profound positive impact to local economies. Despite its high potential, NT is not sufficiently developed in the intervention area and its connection with the assets of the hinterland is insufficient.

Hence, the overall objective of the REGLPORTS Project is to develop a common model for the smart and sustainable NT management through integrated development plans. More specifically, the Project aims to provide a holistic approach by (a) connecting the coastal areas with the rich inland's assets, (b) emerging and promoting the interconnected areas (Area Brand, Thematic Routes), and (c) upgrading tourism supporting services and products.

REGLPORTS foresees to facilitate the sustainable NT management, considering as a top priority the environmental sustainability. The anticipated impact will substantially benefit stakeholders in the intervention area, including local communities, national and/or regional organizations and tourism related businesses. Brief reference to the Project content, objectives, partnership and results.

The Partners participating in the Project are:

- **National Coastline Agency (LP) - AL**
- **Municipality of Molfetta – IT**
- **Union of the Provinces of Puglia - IT**
- **Ministry of Tourism and Environment of Albania – AL**
- **Agency for the management of the town harbor Herceg Novi Ltd. – ME.**

The Associated Partners of the Project are:

- **Municipality of Vlora – AL**
- **Region of Molise – IT**
- **Municipality of Herceg Novi –ME**
- **Tourism Agency of Manfredonia – IT.**

2.3 The REGLPORTS Tourism Development Plan for the Entire Intervention Area

The Deliverable aims to bring together the necessary data and factors of the areas included in the REGLPORTS Project, i.e. the Regions of Puglia and Molise for the Italian intervention area, Albania and Montenegro, with the purpose of identifying common challenges in the tourism and nautical tourism sector and propose strategies and actions to enhance tourist development, engage nautical tourism with the inner countries and generate job opportunities.

Particularly, the capacities of ports and tourism destinations were carefully considered throughout the research, as well as the natural resources (marine water, coastal, soil, inland water) and habitats. In this frame, the process of the collected information and the conclusions deriving from the analysis, will be elaborated for parts of the Entire Intervention Area, encompassing all the potential aspects that might affect natural, cultural and anthropogenic environment.

3 METHODOLOGICAL FRAMEWORK

In order to produce a concise and effective tourism development plan it is crucial to answer the following questions:

- What is the mission/target?
- Who is it addressed to?
- What are the ways to approach the implementation?

Tourism planning is generally a long-term procedure, in that it needs to establish long- and many-time arduous procedures, often taking into account strategies that are demanding to implement. In that regard, the types of planning can vary between short range (1-4 years), to long-range (5-10 years), to continuous meaning that is an ongoing procedure.

Therefore, in order to achieve the expected results, the planning process needs to begin with the identification of the background information and inventory of the area of interest. In doing so, the understanding of the current situation provides the foundation upon which the planning is constructed. Following the identification stage, the goals and objectives need to be established that will define any further direction.

With the objectives identified and the current situation analyzed it is possible to create the strategies, recommendations and overall action planning that will make the Tourism Development Plan.

More specifically, in this development plan the background information is identified in tantum with the Current Situation Analysis, another product of the REGLPORTS project and the detailed SWOT analysis that highlights the Strengths, Weaknesses, Opportunities and Threats of the area. Furthermore, the goals recorded are specific for the area, attainable and tangible, thus avoiding generalization and/or impossible solutions.

The plan continues with the analysis of the strategies and monitoring indicators which identify the possible avenues to lead to the desired goals, i.e., the enhancement of the tourism sector, the improvement of services, and the enhancement of the overall brand of the area as a tourism destination.

To obtain a holistic and complete approach the impacts of the suggested recommendations need to be addressed. It is essential to identify potential impacts as a tool upon which decision-making authorities can evaluate the options, identify the risk of the respective objectives and thus make a more informed decision on the course of action on any case.

Finally, it is very important to establish an evaluation procedure which will provide the basis upon which the results of the actions implemented will be measured. More specifically, there needs to be a predefined set of measurable aspects that will be analyzed through the implementation period of an action in order to assess if said action yields the necessary and expected results or if conversely acts deterioratingly on the area, service, sector upon which it is established. Such evaluation indexes can vary depending on the circumstance and/or sector implemented to be better reflect the results. Examples, of such indexes can be the revenue fluctuations after a predefined period of implementing an action (e.g., 5% turnover raise after 6 months of lowering ticket prices), the number of visitors, the length of stay of tourists and so on.

4 LEGISLATIVE POLICY FRAMEWORK

As expected, one of the most difficult aspects to handle when composing a unified study for different countries is the incoherences in legislation. Therefore, hereby the legislative frameworks for each country is analyzed separately.

In regards to Italy, there are several regional laws that affect the maritime sector. Below are presented those that most directly concern the tourism sector.

- Regional Law 23 JUNE 2006, no. 17 on "Regulations for the protection and use of the coast", updated by the following R.L. 17/2015, which normalizes the administrative functions connected with the management of the maritime property and territorial sea areas conferred by the State pursuant to Article 117 of the Constitution, identifying the functions retained by the Region and those conferred to the municipalities. It also includes the regulation on the use of State maritime areas for tourism and recreational purposes. Coastal planning is divided into three regional and municipal levels and port planning with the respective PRC, PPC, PPT plans, which represent the fundamental tools for the coordinated and sustainable development of the marine economy.
- Use of the coasts: the Region has adopted specific rules to support the use of the regional state property, with R.L. 48/2018 " Rules to support the accessibility of state property areas intended for free bathing for people with disabilities" and R.L. 44/2018, art. 34 "Protection of coastal towers for the enhancement and qualification of accessibility and usability of the Puglian coasts".
- Strategic Tourism Plan 2016/2025 "Puglia365" which has as main objectives to increase the competitiveness of the Region in Italy and abroad, increase international tourism flows, increase seasonal adjustment and enhance innovation in the tourism sector. The Plan also embraces the sea economy, with the provision of specific actions to be implemented in the territory, such as the strengthening and upgrading of marinas, support to shipbuilding as a driving force for pleasure tourism, nautical charters, the nautical industry, seafaring crafts and sports activities (sailing, rowing, sport fishing, diving, etc.).

Similarly, the existing policies on coastal and heritage in Molise Region are the following:

- **Regional Operational Programme 20142020**, financed by ERDF in the framework of objective 5.2.1 and 5.1.1. of Axis 5. 5 "Environment, tourism and culture"; the aim of this priority, is to improve the preservation and promotion of cultural and natural heritage in areas of strategic relevance by enhancing systemic and integrated resources and territorial jurisdictions.
- **The Energetic and Environmental Plan of Molise Region**, that is a guideline document that has the main objective in guiding the Molise Region towards a productive use of energetic resources, but also underline and focalize the attention to reduce the environmental impact in order to preserve the fluvial and coastal heritage of the regional area.
- Molise Region is part of the **Basin Authority and River Basin District of the South Apennines** and the two bodies full transpose the provisions of the Italian Directive about water and fluvial resources, the legislative decree no. 219/2010 and the UE Directive no. 105 concerning the standard to adopt in order to guarantee a quality of the environment and the water and fluvial heritage.

- **Territorial, environmental and landscape Plan of Molise Region:** is a mandatory sectorial plan drawn up by the Region in order to prevent that urban-building interventions spoil the landscape.
- **The Regional Strategic Plan for the Development of Tourism (STP)** is an initiative undertaken as part of the actions envisaged by the Molise Development Pact - Development and Cohesion Fund 2014-2020, Thematic Area "Tourism, Culture and Enhancement of Natural Resources" - Line of Intervention "Integrated Program for the Development and Promotion of Tourism," Action "Molise that enchants - Actions for the promotion, marketing, self-narration and communication of the Molise culture and tourism system." Molise is a land endowed with great tourism potential and vocations, but these need to be converted into development opportunities. This consideration gave rise to the need, consistent with the guidelines contained in the MIBACT's Strategic Plan for Tourism, to outline a completed strategic framework, in light of which to identify specific operational actions to innovate, specialize and integrate the regional offer, increase the competitiveness of the regional tourism system, develop effective and innovative marketing, and redefine the governance of the sector. The elaboration of the Regional Strategic Plan for Tourism Development was entrusted to the Molise Regional Development Agency (Sviluppo Italia Molise S.p.A.), which carried it out in collaboration with the Chamber of Commerce of Molise, with the scientific coordination of the University of Molise and, through a participatory process, with the involvement of institutional stakeholders, civil society and businesses. The Regional Strategic Plan for Tourism Development was adopted by the Molise Regional Council on December 2, 2019 by Resolution No. 405.

In Albania since 1993, the National Government has been engaged in building a strategic framework for tourism, have identified its potential and importance for the social and economic development of the country. Hereby a table reporting the latest strategies carried out by the Albanian Government.

One of the National Tourism Strategic goals (2.1) foresees the definition of priority areas for tourism development and orienting private investments towards them "For sustainable and well-planned development, the public and private investments should be directed to areas of priority tourism development.

In line with the National Sectoral Plan for the Tourism Field, detailed development plans will be developed for each of these areas and specific policies will be developed to encourage private investments in them".

2014	Draft Tourism Strategy 2014 – 2020 (Ministry of Urban Development and Tourism, 2014)	Government authority: The Ministry of Urban Development. It was based on the most important elements of the previous strategies, including the best practices of the OECD countries, as well as sustainability issues.
2018	Strategy for the Sustainable Development of Tourism 2018 – 2022	Ministry of Environment and Tourism, the strategy remained incomplete and in draft form until it was substituted by the 'Strategy for the Sustainable Development of Tourism 2019 -2023
2019	Strategy for the Sustainable Development of Tourism 2019 – 2023	Elaborated by the Ministry of Urban Development and Tourism the strategy set up new future directions of Albania tourism development: It sets up a new philosophy and implementation platform, with guiding principles for sustainable development, clear and comprehensive strategic directions, priorities, measures and feasible institutional, implementation framework and resources

Table 1 More recent strategies for Tourism Development in Albania

Lastly, the Montenegrin Government has been engaged in building a strategic framework for tourism, having identified its potential and importance for the social and economic development of the country. Hereby a table reporting some of the latest strategies in force.

2008	Tourism Development Strategy until 2020	Elaborated by the Ministry of Tourism and Environment aims at positioning Montenegro as a high-quality destination and defines measures such as upgrading accommodation infrastructure, raising service quality, diversifying the offer through nautical tourism, mountain tourism, golf tourism, congress tourism, agri-tourism, wellness tourism, camping, cultural/religious tourism, and national parks, and linking tourism with other industries
2015	National Strategy for Integrated Coastal Zone Management	Defines a strategic framework for sustainable development of country coast. Elaborated by the Ministry of Sustainable Development and Tourism in cooperation with the Mediterranean Action Plan (MAP) of the United Nations Environment. Describes a process for the management of the coast using an integrated approach, regarding all aspects of the coastal zone, including geographical and political boundaries, in an attempt to achieve sustainability
2018	The Law on Tourism and Hospitality	Regulates the conditions for the performance of tourism and hospitality activities and other matters of importance for tourism and hospitality. Stipulates that beneficiaries of incentive measures may be companies, other legal entities, entrepreneurs and natural persons performing catering activities, related to tourism and catering”.
2020	Strategy for the development of the maritime industry 2020–2030	Defines the directions of the maritime economy. Covers almost alleconomic activities related to the sea and its strategic goals are related to increasing the contribution and growth of the economy, strengthening the capacity of the maritime administration, greater involvement of the civil sector, and the inclusion of the professionals as a precondition for a prosperous maritime economy

Table 2 Latest policies on tourism sector -Montenegro

5 THE VALUE OF TOURISM & NAUTICAL TOURISM IN THE INTERVENTION AREA

5.1 Italy

The Italian Intervention Area consists of the Puglia Region and Molise Region. The Region of Puglia, also called Puglia, is located in the southeastern Italy and extends from the Fortore River in the northwest to Cape Santa Maria di Leuca at the tip of the Salentine Peninsula (the “heel” of Italy). It comprises the provinces of Bari, Barletta-Andria-Trani, Brindisi, Foggia, Lecce, and Taranto. The northern third of the Region is centered on the Puglia Tableland, which is flanked on the north by the limestone massif of Gargano Promontory (the “spur” of the peninsula) and on the west by the Neapolitan Apennines. The central third is occupied by the low Murge plateau, which slopes gradually to the narrow coastal plains of the Adriatic Sea in the east. The Salentine Peninsula consists of the lowlands of Lecce, Taranto, and Brindisi and low plateaus east of Taranto and south of Lecce.



Figure 1: Region of Puglia (marked in red)

Puglia is one of the less crowded regions in Italy, with 4 million residents in its surface area of 7,469 square miles. The Region is composed of five provinces (Bari, Brindisi, Foggia, Lecce, and Taranto), where a good number of interesting landmarks are readily available such as cathedrals, archeological museums, historic ruins of the Greek and Roman eras, fishing villages, medieval towns, Europe's largest forests, and fresh beaches along the Mediterranean coast.

Specifically, the Region is rich in cultural assets, such as the two UNESCO heritage sites “Trulli of Alberobello” and “Castel del Monde”, rock churches and Romanesque cathedrals, as well as many festivals and cultural events. Puglia is also rich in traditions and handicrafts such as the famous terracotta whistles of Rutigliano, the laces of Gargano, the ceramic products of Grottaglie and the products made in Salento with the soft stone

of Lecce, with wrought iron and papier-mâché. Moreover, the Region offers a high quality enogastronomy and a diversified cuisine offering different dishes in relation to the different seasons.

The potential of the area as a unique cultural destination, is also reflected on the nautical development in the recent years. In particular, Puglia has played an important role in the Mediterranean in various historical periods, representing a bridge between East and West and the gateway to the Balkans. Since ancient times, ships loaded with oil and wine, marble and precious goods coming from the East left and landed from the ports of Puglia. And from Puglia also the armies of the Crusaders left in the direction of the Holy Land for the reconquest of the Holy Sepulchre which had fallen into the hands of the Muslims. After the medieval period, when the coasts and the cities on the sea were easy prey to pirate and Saracen raids, the function of important port of call for the port cities of Puglia was constantly increasing.

Nonetheless, nowadays, the use of its splendid natural and historical heritage for pleasure boating is very modest. The current offer of port services is lacking both from a quantitative and qualitative point of view. According to the data provided by the Italian Ministry of Transport 2017, the number of nautical tourism facilities in Puglia is low compared to the national average. In fact, the total number of berths is 14,068, representing 8.87% of the national total, while the ratio of berths per km of coast is 16.3 berths per km compared to a national average of 21.3 berths per km of coast. Despite the relatively low numbers, it can still be said that nautical tourism is one of the fastest growing sectors both at international and national level and is an opportunity to be seized for the socio-economic growth of Puglia.

As for the nautical infrastructure, the Puglian coast, 865 km long, has a port system with 3 main ports (Bari, Brindisi, Taranto) 6 smaller ports (Manfredonia (FG), Barletta (Ba), Molfetta (Ba), Monopoli (Ba), Otranto (Le), Gallipoli (Le) and several smaller marinas and pleasure ports.

Hereafter information is provided referring to the marinas in the Region with indications of the services provided both for boats (mooring, electricity and water, fuel, repairs, etc.) and for yachtsmen (catering, commercial services, other activities, etc.).

In recent years Puglia has experienced significant growth as a tourist destination. A study carried out for the PUGLIAPROMOZIONE Regional Tourism Agency on "Tourism in Puglia 2019/2020" shows that arrivals in Puglia in 2019 increased by 4% compared to 2018, of which 11.5% came from outside of Italy. Although growing in terms of internationalisation, the percentage of foreign presences has a wide margin for improvement. In fact, in its strategic plan Puglia one of the objectives is to reduce the gap with the other tourist destinations through actions that support the Hospitality, Infrastructure and Services sector.

Taking into consideration the aforementioned brief overview of the Region of Puglia, it can be said that both opportunities and weaknesses can be identified in the context of nautical touristic development. Those elements will be analyzed further in the SWOT analysis of the area.

The Region of Molise, bordering on the south-east with the Region of Puglia is the newest Region in Italy and the second smallest covering an area of 4,438 km² and has a population of 313,348. The Region is bordered by Abruzzo to the north, Lazio to the west and Campania to the south. The hinterlands of the Molise are mostly mountainous, with 55% of the Region's covered by mountains and most of the rest by hills that reach the sea. It has 35 km of mostly sandy coastline to the north-east, lying on the Adriatic Sea looking out towards the Tremiti islands. This geographical profile, makes the Region a perfect fit for the scope of the REGLPORTS project.

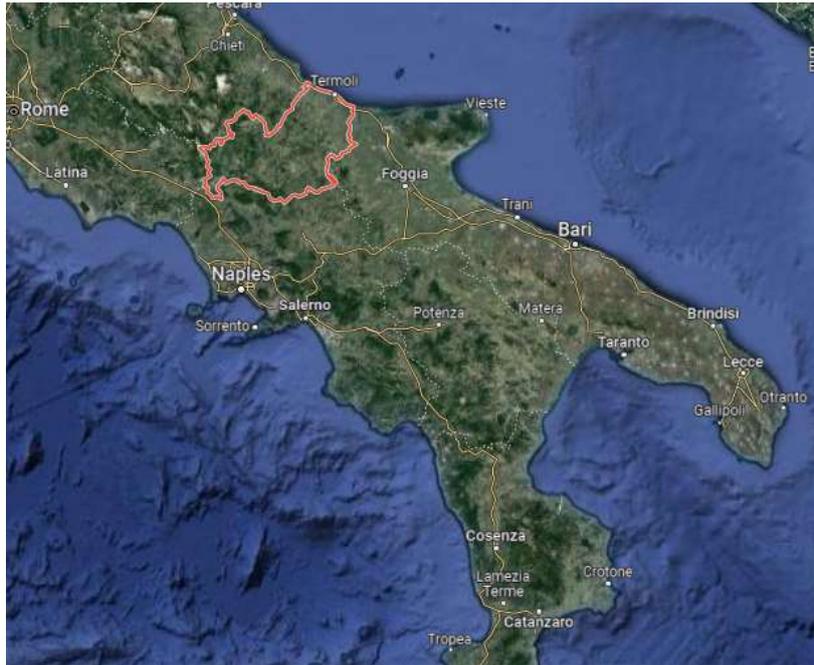


Figure 2: Region of Molise (marked in red)

Molise is the youngest Italian Region (until 1963 it was part of Abruzzo) and the second smallest Region by extension, after only Valle D'Aosta, with an area of 4.460,60 km². It is situated in central-south east of Italy, the extension of Molise goes from Appennino to the Adriatic coast, and it is included by river Trigno in the northern part and river Fortone in the southern zone. In addition, it is bordered by Abruzzo to the north, Puglia to the east, Lazio to the west, and Campania to the south. Molise has also 35 kilometres (22 miles) of sandy coastline to the northeast, lying on the Adriatic Sea looking out towards Tremiti Islands. The Region is traditionally divided into a narrow coastal strip (hills) and a mountainous area in the interior. Basso Molise comprises the hilly part of the Region that drops gradually towards the Adriatic Sea from Frentani and Daunian ranges. This area is characterized by the presence of historically important cities and settlements founded by ethnic minorities, the descendants of ancient migrations from across the Adriatic Sea (Acquaviva Collecroce, S.Felice del Molise, Montemitro, Campomarino, Portocannone and Ururi). The urban centres of Alto Molise, on the other hand, often face south-east and have the aspect of medieval burghs: they rest on plateaux or outcrops of calcareous rock, with the houses leaning against each other and crowded around a castle or palace or the principal church.

Specifically, the territory is divided into two Provinces:

1. the Province of Campobasso, with an area of 2,925.41 km², extends from the coast to the central area: it includes, in addition to the regional capital, the larger towns (Termoli, Boiano) and the coastal inland villages which are the most populous in the Region (Basso Molise);
2. the province of Isernia, with an area of 1.535,24 km², includes the mountain area of Molise (Alto Molise). In total, in the Region, there are 136 municipalities, of which 84 in the province of Campobasso and 52 in the province of Isernia.

The surface of Molise is mainly characterized by mountainous and hilly areas, which represent the largest part of the territory. About 55% of the Region is composed of mountains and most of the rest by hills that go down to the sea. 123 of the region's 136 communities are located in mountainous areas. The orography is

characterized by the Mainarde mountain range (Mount Morrone 1805 m) and the Matese Massif (Mount Miletto 2050 m). The hilly areas are limited to the hinterland of the coastal strip (Plain of Larino) and to the south part of the Matesina area (Plain of Boiano). The mountains and the hills are very arid and because of the composition of the clayey ground, they are been fully grown deep furrows. The principal rivers are all of torrential character and flow in the Adriatic Sea: Trigno that originates in the Apennine Mountains, in the province of Isernia and flows near Vasto; Biferno that flows from the Matese mountains and runs through several municipalities in the province of Campobasso, forming the Lake of Guardialfiera; and Fortore that flows through the provinces of Benevento, Campobasso and flows not far from Lesina Lake.



Figure 3: Provinces of Molise

Therefore, also the landscape is predominantly mountainous and hilly and - considering that already in ancient times the settlements were formed according to the morphology of the territory – characterized by the presence of villages located on the tops of the hilly promontories. While the coast is characterized by the presence of beaches, generally sandy and large and delimited towards the interior by dunes, or in direct contact with the terraced relief and hillsides, with coastal floodplains, or land characterized by building construction and seaside enjoyment. The natural and rural landscapes together with the network of old villages, the coast and and the authentic nature of the components can act as the first factors in building the basis of a more solid tourist framework. Influenced by topography, the climate is continental with winters colds and warm summers. The snowy precipitations abound in the mountainous zones. The rains are scarce in the summer months. There is a mild climate in the narrow coastal strip, a temperate one in the uplands and a continental climate in the more inland and mountainous areas.

The Region is crossed by a single highway, the Adriatica, which runs through the territory for 36 km. The regional network consists of state and provincial roads managed by the Region with functions of planning and

coordination on the interventions to be carried out, maintenance and management, classification and declassification of roads.

The economy of the Region is based above all on agriculture, even if the majority of the land is not very fertile. The main products are cereals, vegetables, fruit, olives, vines and tobacco; the breeding is modest. The industry is almost entirely made up of handicraft enterprises, operating in the food, engineering, clothing and building materials sectors. Sea and mountain tourism is still rather irrelevant.

Most of the municipalities of Molise (villages of medieval origin) still retain many traditional festivals. Some, of medieval origin or dating back to even more ancient pagan cults, others more recent, are however exciting in equal measure.

Significant and spectacular events take place during the whole year organized by the municipalities in the Region, such as:

- I Misteri di Campobasso (The Mysteries of Campobasso on June)
- La Festa del grano di Jelsi (Jelsi Wheat Festival on July)
- The living nativity scene of Montenero di Bisaccia on December
- Altari di San Giuseppe (18 March).
- San Basso (4 August).
- Incendio del castello (Castle fire -15 August).
- Sagra del Pesce (Fish Festival -last week of August)
- Festival del Folklore (Festival of the Folklor)

The villages and historic centers, (*borghi*) located mostly on heights, can themselves become places of hospitality if organized in a network by redesigning their function.

As sites, which should be entrusted with the intangible linked to the heritage of cultural memory, the function of vehicles for de-seasonalising the territory, making it attractive throughout the year, not just in summer

The main touristic attractions are:

- borgo medievale, history and origine.
- Torre sinarca, history and origin.
- Castello Svevo. (castle)
- Cattedrale. (cathedral)
- A Rejecell
- Various churches.
- I trabucchi
- Belvedere della torretta.

Concerning the demo-ethno-anthropological heritage on the coast, the most prevalent festive and devotional form of coastal community is certainly the celebration of Patron Saint, in which a bust or icon of Saint or Madonna is venerated by local community as protectors. The procession is often accompanied by fireworks, fairs, blessing of faithfuls and trips. The latter are similar to breakfast consumed by pilgrims who follow the statue of Patron Saint out of the city. Today, these festivities are transformed into a community gathering, outdoor dining, community celebrations and local events.

MUNICIPALITY	DENOMINATION	RECURRING EVENT	TIPOLOGY
Campomarino	<i>festa patronale di S.Cristina</i>	24-July	religious-devotional and nutritive-traditional celebration
Campomarino	<i>festa di S.Giuseppe</i>	19-March	religious-devotional and nutritive-traditional celebration
Campomarino	<i>lingua albanese</i>	habitual	vehicular language within the community of speakers
Montenero di Bisaccia	<i>festa di S.Matteo</i>	21-September	religious-devotional celebration
Montenero di Bisaccia	<i>festa della Madonna di Bisaccia</i>	15-17 May	religious-devotional celebration
Montenero di Bisaccia	<i>castrato alla baraccara</i>	09-July	nutritive-traditional celebration
Termoli	<i>processione di S.Basso a mare</i>	3-5 August	religious-devotional celebration
Termoli	<i>Madonna della Vittoria</i>	two days after Easter	religious-devotional celebration
Termoli	<i>brodetto</i>	habitual	nutritive-traditional celebration
Termoli	<i>festa di S.Giuseppe</i>	19 – March	religious-devotional and nutritive-traditional celebration

5.2 Albania

Albania, officially known as the Republic of Albania, is a country in Southeast Europe on the Adriatic and Ionian Sea within the Mediterranean Sea. The capital city is Tirana (Tiranë). Albania is almost midway between Equator and the North Pole, and covers a surface of 28.748 km². The overall length of the borderline of the Republic of Albania is 1094 km; out of which 657-km is land-border, 316-km sea-border, 48-km river-border and 73 km lake-border. Albania's immediate western neighbour, Italy, lies some 50 miles (80 km) across the Adriatic Sea.

About three-fourths of its territory consists of mountains and hills with elevations of more than 200 metres above sea level; the remainder consists of coastal and alluvial lowlands. The North Albanian Alps, an extension of the Dinaric Alps, cover the northern part of the country. With elevations approaching 2.700 m, this is the most rugged part of the country. It is heavily forested and sparsely populated.

Along the Adriatic coast over a distance of nearly 125 miles (200 km) and some 30 miles (50 km) into the interior are the low there is the fertile plain of western Albania, the most important agricultural and industrial region of the country—and the most densely populated

The territory of Albania is included in the humid sub-tropical zone of the Northern Hemisphere, and it belongs to the Mediterranean climatic zone.

Albanians are a native Balkan people, although their exact origin is unclear. The national ideology insists on an unequivocal ethnic relationship with the ancient Illyrians. As little is known about the Illyrians and there are no historical records referring to the existence of the Albanian people during the first millennium C. E., it is difficult to affirm or deny the relationship. Albanians entered postclassical recorded history in the second half of the eleventh century, and only in this age can one speak with any degree of certainty about the Albanian people as they are known today

It can be assumed that the Albanians began expanding from their mountain homeland in the eleventh and twelfth centuries, initially taking possession of the northern and central coastline and by the thirteenth century spreading southward toward what are now southern Albania and western Macedonia. In the middle of the fourteenth century, they migrated farther south into Greece, initially into Epirus, Thessaly (1320), Acarnania, and Aetolia. By the middle of the fifteenth century, which marks the end of this process of colonization, the Albanians had settled in over half of Greece in such great numbers that in many regions they constituted the majority of the population.

Despite these extensive settlements, the Albanians, largely a herding and nomadic people, do not seem to have created any substantial urban centers. There were no noticeable Albanian communities in the cities of the Albanian coast during the Middle Ages. Durrës was inhabited by the Venetians, Greeks, Jews, and Slavs; Shkodra, by the Venetians and Slavs; and Vlorë, by the Byzantine Greeks. It is estimated that a considerable proportion of Albanians were assimilated by the time of the Turkish invasion; in other words, the Albanians had been largely marginalized in their own country. Only during the Ottoman period did they began to settle in towns and acquire some of the characteristics of a nation rather than those of nomadic tribes.

Albania has many influences incorporated into art and culture from invading countries. A part of Illyria in ancient times and later of the Roman Empire, Albania was ruled by the Byzantine Empire for seven centuries. An alliance of Albanian chiefs in the mid-fifteenth century failed to halt the advance of the Ottoman Empire and the country remained under Turkish rule for more than four centuries until it proclaimed its independence in November 1912.

In the Country there are two distinct cultural groups, the Ghegs in the north and Tosks in the south. Geographically divided by the River Shkumbin and with distinct dialects, their cultural differences are substantial, though both are proudly nationalist. With no common written language until 1972, Albanian's have passed their heritage through epic rural songs, both nationalistic and lyrical in style.

Most of the art during communist rule was socialist realism. This style continued after communism as Albanian artists wanted to inspire national pride in their countrymen. Today, Albanian artists continue to maintain a proud connection to their roots with contemporary music and arts with an international flavour.

During the communist period, churches and mosques were destroyed and replaced by soviet symbolism and uniform high-rise blocks much of Albania's earlier architecture. The Country hosts two UNESCO-designated World Heritage Sites, which present the traditional Albanian architecture namely the cities of Berat, Gjirokastra and Butrint. In the city of Berat there are many examples of Byzantine churches, mosques of the Ottoman period and a castle of the thirteenth century.

In Gjirokastra with its stone made houses even known as The Stone City it is possible to visit interesting sites, part of the cultural heritage and natural wonders. At Butrint, there are ruins from each period of the town's development, including Greek, Roman, Byzantine and Venetian eras.

5.3 Montenegro

Montenegro is a country in South Eastern Europe and is one of the Mediterranean countries having a coastline on the Adriatic Sea. At the seaside, Montenegro is bordered by Croatia in the southwest Bosnia and Herzegovina (northwest), Serbia (northeast), Kosovo (east), and Albania (southeast).

Montenegro's administrative capital is Podgorica, though its cultural centre is the historical capital and older city of Cetinje. For much of the 20th century Montenegro was a part of Yugoslavia, and from 2003 to 2006 it was a component of the federated union of Serbia and Montenegro.

The country's names—both Montenegro (from Venetian Italian) and Crna Gora—denote “Black Mountain,” in reference to Mount Lovćen (1,749 metres), its historical centre near the Adriatic Sea and its stronghold in the centuries of struggle with the Turks. Alone among the Balkan states, Montenegro was never subjugated. The old heartland of Montenegro, in the southwest, is mainly a karstic region of arid hills, with some cultivable areas, around Cetinje and in the Zeta valley. The terrain of Montenegro presents high mountains along its borders with Kosovo and Albania and a narrow coastal plain that is only 1 to 4 miles (2 to 6 km) wide. The coastal region is noted for seismic activity.

Montenegro's sunny shoreline is lined with Mediterranean trees and sandy beaches. These and the massive mountain ranges in the bay of Kotor frame the perfect scenery for a magnificent yachting area and for nautical tourism in general.

During the time of the Roman Empire, the bay of Kotor was used as a strategically **important** base for naval forces. For centuries the Bay of Kotor also formed a concessional border between Christianity and Islam.

Nowadays it is valued for its natural beauty and its historical and cultural sites. The towns of Perast and Kotor as well as the tiny islands of Our Lady of Rocks and St. George are listed as UNESCO World Heritage Sites. These beautiful scenes now form the backdrop for some of the most exciting racing regattas for sailing yachts in Europe.

Montenegro has been an independent parliamentary country, since 2006. This young but stable democracy places a strong emphasis on tourism and warm hospitality. Being only a few hours flight from most European capitals, Montenegro today is an accessible, friendly and astonishing attraction.

Montenegro is best known to the outside world for its rich architectural heritage and medieval murals date to the 10th century. The Romanesque cathedral of St. Tryphon in Kotor, the 16th-century Husein-Pasha Mosque in Pljevlja, and the Baroque church of Our Lady of the Rocks on an islet in the Bay of Kotor are some important testimonies of the influences received during the years. , Montenegro's first literary pieces dating back 1,000 years, while the first Montenegrin book was printed 500 years ago. Not of less importance are the works of Montenegrin painters in Post-Impressionist and Expressionist techniques exhibited in famous galleries and museums throughout the world.

Each town on the coast has its own history: Herceg Novi, town of carnivals and artists; Kotor and Perast, UNESCO-protected maritime towns dating back to the pre-Christian era; Budva, intersected by series of alleys and squares with numerous cultural and historical monuments, remains of frescoes and inscriptions from the mid-12th century and wonderful sandy beaches and vibrant nightlife on the other hand, is transformed every summer into an open-air stage - Theatre City; Ulcinj, a town of diverse cultures - eastern “West” and western “East”.

The old town of Budva was destroyed in an earthquake in 1979; since rebuilt, it now serves as a beach resort and amusement park.

Music too has an ancient history in Montenegro. A bone whistle from the Paleolithic Period (Old Stone Age) found in what is now Montenegro is the oldest musical instrument in all of Europe. Early church chants, as well as a number of organs built in the coastal region, testify to a lively tradition of church music.

5.4 Economic Data of Tourism

Tourism has the same needs, requirements and objectives for economic development, employment and wealth creation as any other sector. In countries where tourism has an important influence on the local economy, it is essential to evaluate the impact it can have on the quality of life of the local population.

Economic data related to the tourism sector

Tourism is one of the driving forces of the Italian economy. In 2019, the sector recorded 6.4 billion on final consumption (12.3% of the total), 8.9 billion in terms of added value (13.6% of the total). While the international tourist spending in Puglia according to Bankitalia's report has increased of +3% from January to September 2019.

The regional tourist industry consisting of 52,000 companies (about 38% on sectors with direct involvement with tourism) equal to about 14% of companies active in 2019 while 135,000 (15.4% of the total) employees are directly and indirectly involved.

According to Bank of Italy, international tourist spending in Puglia increased by + 3% from January to September 2019.¹

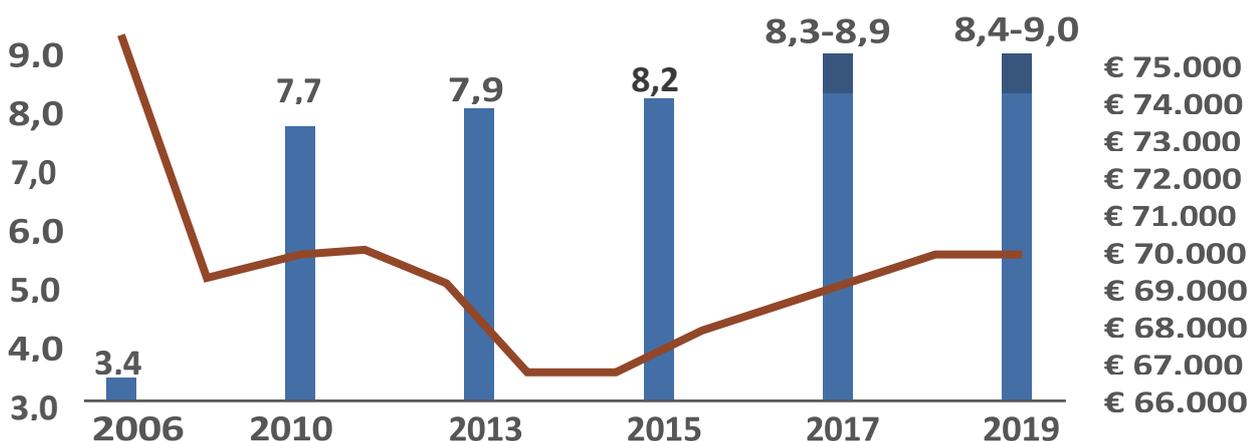
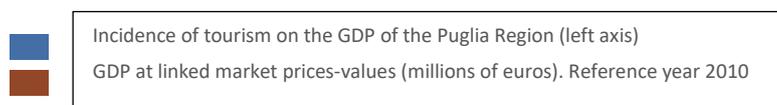


Figure 3: Economical Impact of tourism



The companies in the sector that have recorded the best performances (2018)² are tourist guides, companies dealing with cultural heritage and naturalistic areas, tour operators and travel agencies which are also more careful to introduce initiatives of improvement and innovation.

¹ Source: Ca' Foscari, *The economic impact of tourism in Puglia*
IPRES elaborations and estimates on ISTAT data, Pugliapromozione Regional Tourist Agency

² Ca' Foscari, *L'impatto economico del turismo in Puglia*

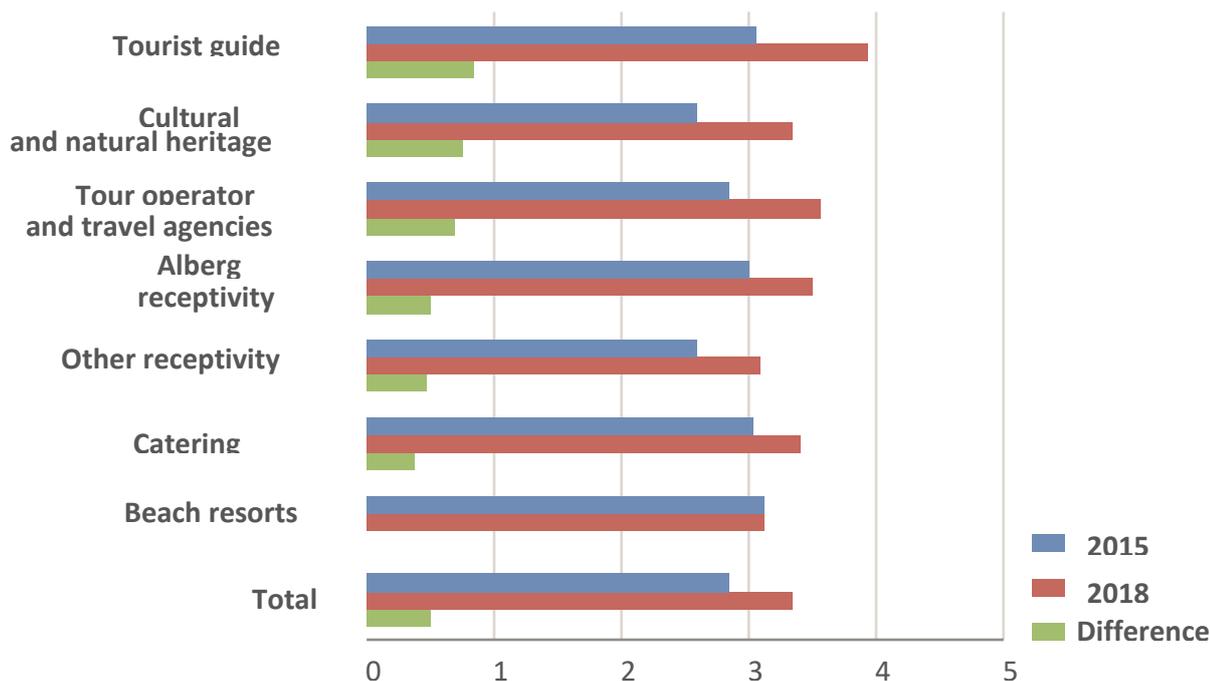


Figure 4: Tourism Companies performances

The tourist taxes

The municipalities that apply the tax in 2019 are 33, 12.7% of the total (258):

- Lecce (13): Lecce, Gallipoli, Ugento, Salve, Otranto, Melendugno, Porto Cesareo, Nardò, Castrignano del Capo, Santa Cesarea Terme, Patù, Giurdignano and Minervino di Lecce.
- Foggia (8): Lesina, Manfredonia, San Giovanni Rotondo, Vieste, Peschici, Mattinata, Rodi Garganico and Vico del Gargano.
- Bari (4): Alberobello, Castellana Grotte, Monopoli and Polignano.
- Taranto (3): Castellaneta, Ginosa and Martina Franca.
- Brindisi (4): Brindisi, Carovigno, Fasano and Ostuni.
- BAT (1): Margherita of Savoy

The overall revenues have been estimated at around 14 million euros. The municipality that enjoys the highest average income is Vieste with 1.5 million euros, followed by three municipalities in Salento, namely Otranto with 1.2 million euros, Lecce with 1.1 million euros and Ugento with 1.1 million. EUR.

In the Albanian intervention area is achieved the fastest growing tourism sector among EEA countries with over 5.3 million international tourist arrivals reported for 2018. According to the Economic Impact Report of 2018 of the World Travel and Tourism Council¹ (WTTC), along 2017, the tourism sector recorded a direct contribution of 8,5% of the Country's while including indirect multiplier effects, total contribution is almost three times higher than \$ 3.47 billion, accounting for about 26.2% of the GDP, positioning this sector as one of the main contributors to the development of the national economy.

In terms of employment the tourism employs about 7.7% of the total labor force in Albania, while by 2028 this number is projected to grow to 8.8%.

Referring to the same report of the World Council on Travel and Tourism (WTTC), investments in this sector accounted for about 7.5% of all investments in the country, while by 2028 this figure is projected to rise to 8.2%.

In the year 2017, there has been an increase in employment in the sector amounting to 93,000 employments directly related to tourism and 291,000 jobs attributed to the other indirectly related sectors while there are approximately 22,785 active companies operating in the sector. The accommodation and food services sector includes restaurants, facilities, and other food and accommodation facilities such as hotels, guesthouses, hostels etc. This sector accounts for about 15% of the entire service sector and 11% of the entire economic activity in Albania.

According to data from the Institute of Statistics of Albania in 2018, foreign tourists stayed an average of 4.3 nights in Albania, with 76% residing in hotels while spending an average of 52 EUR/day.

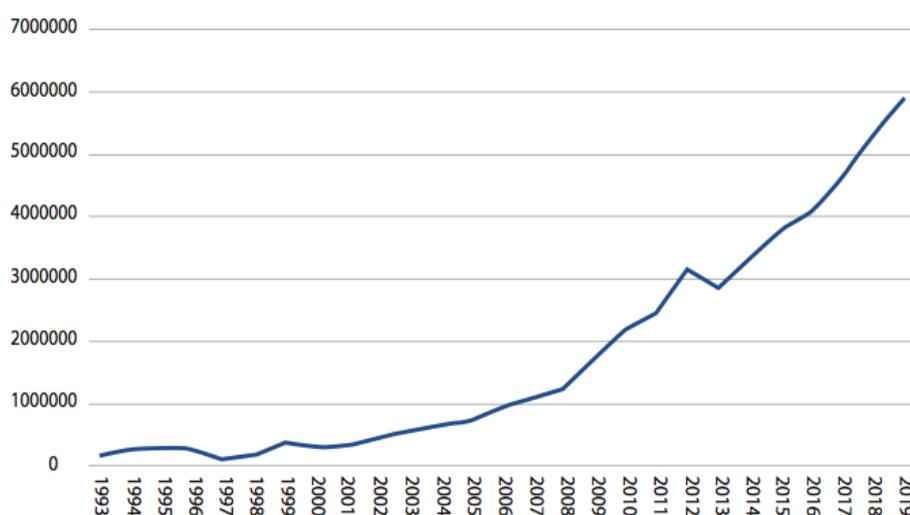


Figure 5: Tourist presences in Albania 1991-2019

In regards to Montenegro in 2019, travel and tourism direct contribution to GDP for Montenegro was 0.6 billion US dollars. Travel and tourism direct contribution to GDP of Montenegro increased from 0 billion US dollars in 2000 to 0.6 billion US dollars in 2019 growing at an average annual rate of 18.18%. While the direct contribution of travel and tourism to employment growth in the same year was 0.3% which means 13000 employees directly employed in this sector. Even though the direct contribution of travel and tourism to employment growth has fluctuated substantially in recent years, tended to decline over the past decade but 2019 showed an increase of 0.3 percent from previous year.

In 2019, arrivals for Montenegro were calculated to 2.51 million people. Arrivals of Montenegro increased from 272,000 in 2005 to 2.51 million in 2019 growing at an average annual rate of 21.32%.

Focusing in the arrivals by sea and therefore part of the Nautical Tourism sector, in 2019, the total of 4.775 foreign vessels for entertainment, sport or recreation entered the national sea waters of Montenegro. That indicates an increase of 1.4% in comparison with 2018. Of the total, there were 4.211 vessels which arrived by sea and 564 vessels which were transported by land.

By type of foreign vessels for entertainment, sport or recreation in the internal sea waters of Montenegro, there were the largest number of arrivals of sailboats (39.9%), motor yachts (33.7%) and other vessels (26.4%).

Number of persons arrived on these vessels in 2019 was 28 562, which is an increase of 3.2% in comparison with 2018. By citizenship, the largest number of arrived persons on these vessels was from: Great Britain (10.8%), USA (5.7%), Croatia (5.7%), Italy (4.9%), Germany (4.2%), France (3.9%) and other countries (64.8%).



Figure 6: International arrivals 2015-2019

The Strategy for tourism development until 2020 indicates the orientation of Montenegro to the extension of the tourist season. In fact, official data show that tourism traffic is realized in the period of two months during the summer, which points out to the prominent seasonality and a serious issue of long-term development strategy.

Overall the data presented, shows a clear increase in visitors in all three countries of the intervention areas. This is important, as it highlights a clear trend, which is coherent in all of the area and could then allow the implementation of similar policies to increase revenue on the individual markets.

5.5 The Case of the Transnational Cluster

Focusing in the territories of Montenegro and Albania, excluding the pandemic period, the tourist flows increase exponentially, no longer attracted only by consolidated tourist destinations along the coast, able today to attract Western European markets and no longer just Eastern Europeans by virtue of raising the standards of facilities and services, but also of the complete rearrangement of public spaces and services: the cases of Kotor, Budva, Ulcinje, Valona and Saranda. A policy more responsive to the requirements of the European Union and the undoubted wealth and attractiveness of the cultural and natural resources of those territories have by now consolidated demanding tourist flows in the top markets such as North American, North European, Australian and New Zealand, in search of new destinations and good standards of service and safety. This is how important destinations such as Gjirokastra, Berat, Shkodra, the splendid archaeological area of Butrint and the more inland Elbasan and Lake Ohrid, and parks and geosites such as the famous Blue Eye or the Osumi or Tara gorges have consolidated positions of absolute importance in the Mediterranean area, also intercepting the cruise flows of primary destinations such as Corfu and Dubrovnik towards the hinterland.

The port situation sees deep differences between the two countries. Much more advanced and on Croatian standards is the one of Montenegro, which boasts an excellent sector of chartering, shipbuilding and good

quality facilities in Budva, Erceg Novi, Bar, and boasts an important cruise stop in Kotor and hosts one of the major tourist ports in Tivat of the Mediterranean, capable of mooring superyachts up to 250 m.

The situation in Albania is much less evolved, where until a few years ago the internal market simply did not exist, and this not only because of the poor nautical culture of a country traditionally suited to an agricultural and mountain economy, but also because of the moratorium on boats, adopted as part of the measures to prevent smuggling, which the Albanian government adopted in 2005 and remained in force until 2013.

Today the yachting sector is among the priorities of Tirana's tourism development programs, and the development of maritime transport is part of the National Transport strategy and the 2016-2020 Action Plan through development investments in compliance with regulatory plans and with an orientation towards the market economy by 2020. It envisaged the rehabilitation of the infrastructures and superstructures of the four main ports and the tourist ports, and the development of tourist ports, including the construction of infrastructure and superstructures, in order to increase the number of tourism ships and tourists with an increase in related industries.



The varied Albanian coast offers good opportunities for the development of nautical tourism. The foreign manufacturers of boats and nautical equipment see in Albania a good long-term potential, where they can produce, maintain and store boats from all over the Mediterranean, with very low operating costs, thanks to taxation and the cost of labor, among the most advantageous in Europe. In the immediate perspective, the grafting of the technological skills of the Puglian nautical supply chain in a rapidly evolving socio-economic context such as the Albanian one is undoubtedly one of the greatest, concrete and reciprocal opportunities for both sides of the Otranto Canal.

6 MAPPING OF THE PROJECT'S INTERVENTION AREA

This Chapter provides the detailed summing of the mapping of the entire Intervention Area based on the studies drafted for the Italian, Albanian and Montenegrin Intervention Areas. This section is important as it helps identify, and where possible quantify, the current status of the entire Intervention Area.

6.1 Italy

In regards to the Italian area, the Puglia Region, in collaboration with operators in the sector, local authorities, associations, trade unions, stakeholders, MIBACT, local opinion leaders, universities and LAGs, has implemented the Puglia365 2016-2025 Tourism Strategic Plan. It identified the strategic interventions that the Puglia Region intends to activate in the forthcoming years to promote tourism and to qualify the offer by diversifying it, to increase the number of visitors by pursuing the perspective of de-seasoning.

The initiative was financed with 36,090,000 euros, under the POR - Regional Operational Programme ERDF - European Regional Development Fund and ESF - European Social Fund 2014-2020 for the three-year period 2017-2019, entrusted to the Regional Tourism Agency Puglia Promozione. During 2018, the intervention was strengthened with an allocation of an additional €4,250,000 for 2018 and 2019 for more than €40 million in total.

Among its objectives it aims at:

- the growth of the competitiveness of the Puglia destination in Italy and abroad;
- increasing the flow of national and international tourists;
- the depersonalization of tourism, with the aim of helping the Puglian territories to organise themselves for year-round tourism.

The Strategic Areas cover the themes of:

- Valorization and Welcoming
- Promotion
- Communication
- Innovation
- Products

Some Results obtained

The increases recorded in Puglia from 2015 to 2019, according to Istat data, were:

4.2 million arrivals (+24% compared to 2015), 15.5million presences (+14%)
1.2 million arrivals from abroad (+60%)
3.8 million international overnight stays (+43%),
3 million domestic arrivals (+14%)
11 million overnight stays by Italians (+7%)

The official accommodation offer (Istat data) counts 8 thousand accommodation facilities (+42% compared to 2015) for 286 thousand beds (+4%).

From 2015 to 2019, the companies directly involved in the tourism sector (36 thousand) have increased by +10% and the employees by +27%, reaching more than 178 thousand work units at the beginning of 2020.

The impact on the regional economy¹

Tourism in Apulia has an impact of 6.5 billion on final consumption (12.3% of total consumption);

9 billion in terms of added value (13.6% of the total);

The direct incidence of the sector on regional GDP is 9% (13% indirect incidence).

The experience of Puglia 365, could be transferrable to the neighboring region of Molise as the two regions hold a very similar profile both geographically and socioeconomically.

The tourist offers of a given tourist destination is represented by all the elements that it is composed and that constitute the factors of attractiveness which, organized and provided, meet the needs of the final or potential user. This offer is often highly flexible and adapts to the needs of the demand also by virtue of the phenomenon of seasonal adjustment.

It consists of various elements that compose the tourist product:

- accommodation and restoration structures;
- transports;
- complementary services;
- leisure activities;
- assistance and support to tourists.

In order to better define a Tourism Development Plan, it is necessary both to analyze the tourist flows in the area, in order to analyze their dynamics and future potential (demand analysis) and to identify the existing endowment, in order to exploit the existing resources as much as possible, foreseeing their adjustment interventions, also with a view to containing as much as possible the costs related to the development of the strategies to be undertaken (offer analysis).

In consideration of this, it has been proceeded to the implementation of a punctual analysis that would highlight: the different characteristics of the tourist flows, both hotel and extra-hotel, which represent the market demand.

➤ Mapping of tourist flows

Making a more detailed analysis and considering the total arrivals at hotels and non-hotel facilities, it can be noted that in 2019 were registered, 4.258.308 tourist arrivals of which 3.085.772 were from Italy and 1.172.546 foreigners. Below is a table of arrivals in Puglia distributed by month and by type of origin Refer to the origin of the tourists, the weight of foreign tourists in Puglia is still far from what is recorded in Italy and therefore with significant margin for improvement. In 2019, international arrivals reached the 28% and attendance/overnights the 25%. Compared to 2015, the internationalization rate of incoming has increased by 7 percentage points.

The highest arrivals are concentrated in the summer months both Italians and foreigners have contributed significantly to increase the flows between May and September. Compared to 2018, 2019 saw an overall increase in the share of arrivals of about 5%

The total presences in the facilities of the region follow the trend of arrivals while recording an increase compared to the previous year (2018) in which had registered a total number (Italian and foreigners) of 15.197.186 while in 2019 there were 15,440 297 presences.

	ITALIANS	FOREIGNERS	TOTAL
Month	Arrivals		
January	86.506	15.157	101.663
February	95.416	18.601	114.017
March	138.632	31.559	170.191
April	210.327	89.963	300.290
May	202.781	150.734	353.515
June	411.169	168.982	580.151
July	499.544	166.195	665.739
August	690.703	156.463	847.166
September	319.931	198.861	518.792
October	174.726	124.098	298.824
November	126.996	32.114	159.110
December	129.041	19.809	148.850
TOTAL	3.085.772	1.172.536	4.258.308

Figure 7: No of visitors per month

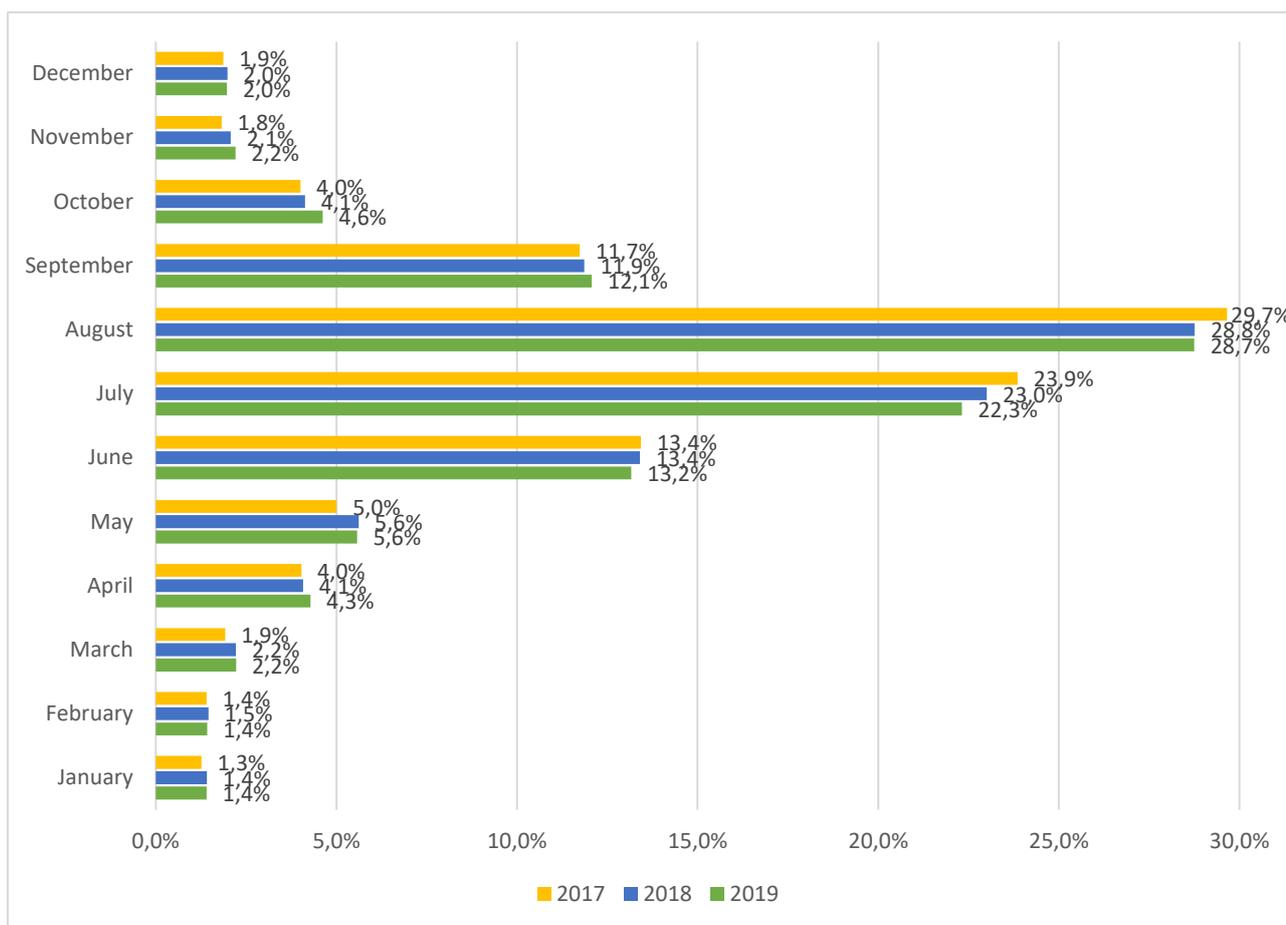


Figure 8: Visitors distribution (%)

In relation to the three years of reference (2017-2019), August is the month with the highest number of presences followed by July, June and September

Refer to the origin of the tourists, the weight of foreign tourists in Puglia is still far from what is recorded in Italy and therefore with significant margin for improvement. In 2019, international arrivals reached the 28% and attendance/overnights the 25%. Compared to 2015, the internationalization rate of incoming has increased by 7 percentage points.

Puglia is placed in 8th place in the national ranking for number of total presences, overcoming the Regions of Sicily and Sardinia. However, the dimension of tourism is still moderately contained in comparison to the potential of the Region.

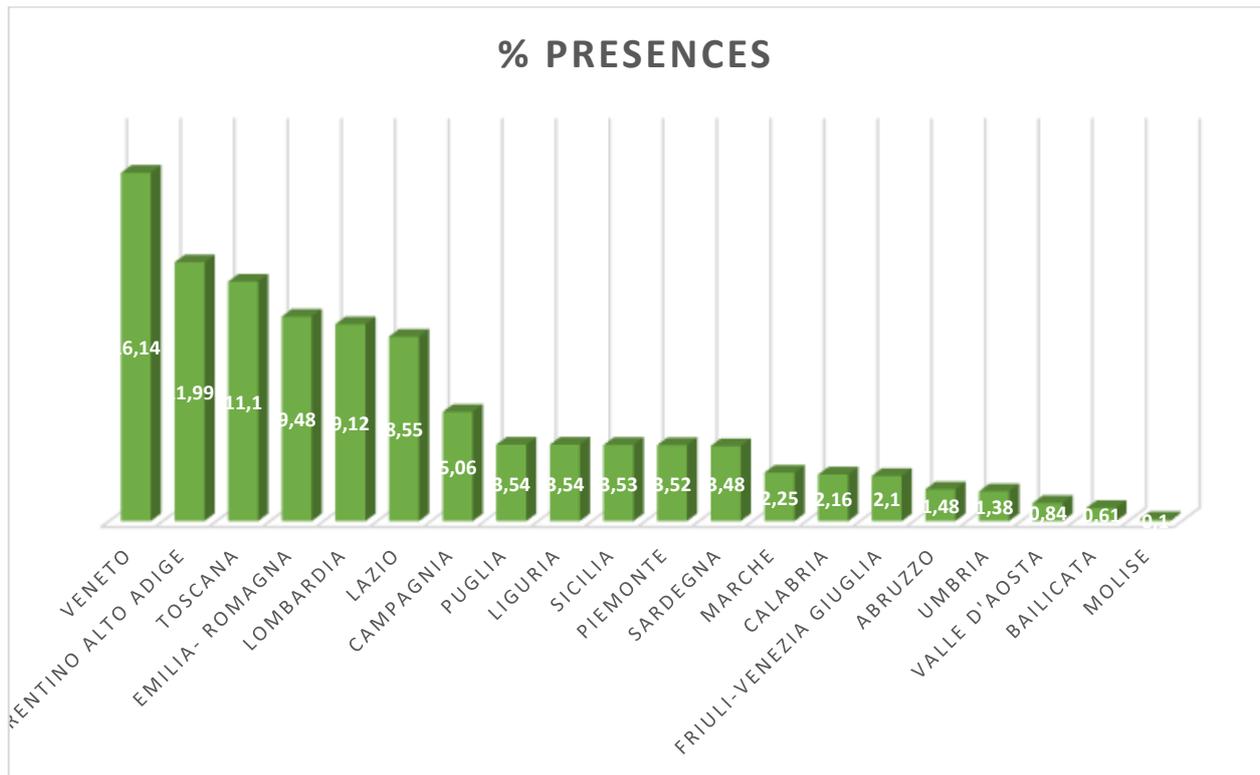


Figure 9: Distribution per area (%)

Most tourists prefer to sojourn in hotels. On the whole, tourists visiting the region prefer hotels to extra-hotel establishments. In 2019, 69% of arrivals made use of hotel hotels and the remaining 31% used non-hotel facilities. This trend can be seen in both national arrivals (70.65% stayed in hotels) and foreign arrivals (65.44%).

Analyzing the arrivals in 2019 in the Region, in fact, about 2.8 million of Italian tourists and 0.77 million foreign tourists have been accommodated in hotels, while only 0.91 million Italian tourists and 0.41 million foreign tourists have preferred the extra-hotel structures.

The accommodation offer has had a small variation in recent years even if the number of extra-hotel facilities has increased most. The Region in 2019 has a total of 7996 accommodation facilities with 284,854 beds. The quality of hotel facilities is satisfactory with 39 % 4- and 5-star hotels, 40 % 3 stars and the remaining 12 % 1 and 2 stars.

In regards to the Molise Region, the summer of 2020, 81% of Italian tourists had changed their travel behavior, due to the Covid-19 pandemic and they choose their destinations based on the perceived safety. In 2020 the number of tourists coming from the same region was around 24,4% with a peak of 28,3% in the south and on the islands.

During 2020 Molise region registered a huge touristic development, around 150%. The 48,7 % of the tourists came from other Italian regions, with peaks of 54,8% in the south and on the islands. One of the most interesting aspects is the analysis of what the tourists look for when they travel:

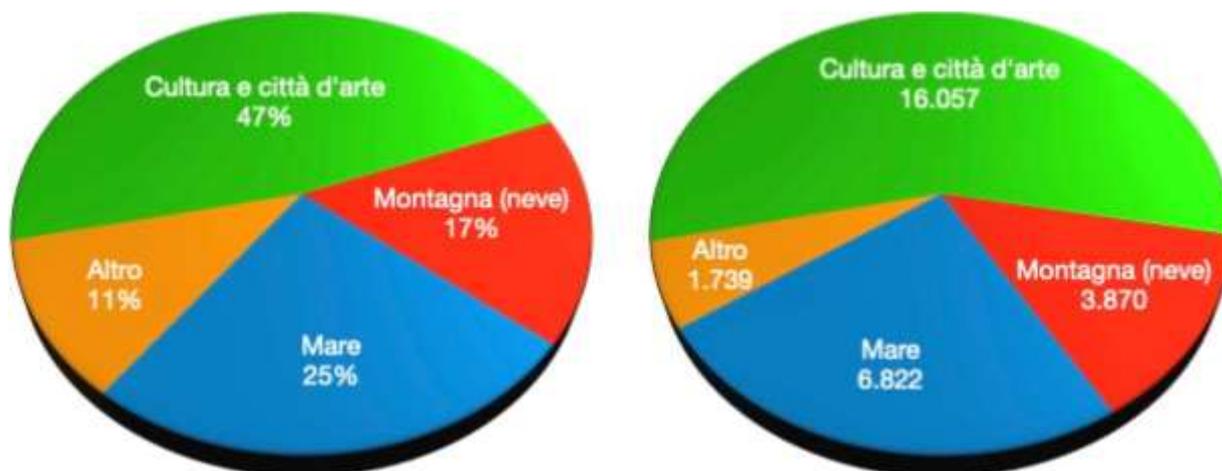


Figure 10: Tourism interests

It is important to highlight that in 2019 towns and cities destinations had, for the first time, nearly the same number of tourists as the beach destinations. A quarter of the leisure holidays consists in visiting more than one place, that is to say that 32,1% of tourists tend to combine city destinations with beach destinations.

With regard to the accommodations 54,2 % of travels and 62,1% of nights are spent in private accommodation. Private accommodations are the vast majority in central and southern Italy, respectively 58,7 % and 58,6%.

58,2 % of tourists book their accommodation through websites, among them, 69% of the reservations are made through an intermediary, the remaining 31% has a direct contact with the chosen facility.

10,8 of private accommodations are booked through specific platform. While travel agencies, real estate and tour operator with their websites and app reach only the 9,6% of reservations.

The data of the city of Termoli, during 2020 show that diffused hotels and residences gained the +2,6% of Italian tourists. According to the data, 47% of tourists come from southern Italy.

The comprehensive data of tourism in Termoli (hotel and various accommodation) is of 132.028 people, among them 125.574 Italians that is to say -12,3%. Last year arrivals were 37.021, among them 35.125 Italians, that is to say -30,7%.

The tourists came from different Italian regions, 37% from northern Italy, 16% from central Italy and 47% from southern Italy. The negative data is the absence of foreign tourists, due to the increased covid-19 cases. In Autumn, especially in October, tourists preferred extra-hotel facilities. The latest data, referring to December, show that hotels regained value, tourists preferred hotels over residences. Hotels registered +1,6% of presence, while non-hotels facilities registered -39%.

To promote tourism, the tourism sector in general must provide not only a digital showcase of the destinations, but it is necessary a specific vision and a strategic management that put together entrepreneurial interests, professional competencies specifically on tourism, on its laws, on environmental protection and its revaluation and also on cultural heritage.

These factors together cannot be solved solely by creating a digital showcase, it requires a strong organizational work, where local institutions must cooperate to express and reevaluate the authenticity and the cultural heritage of the area.

The individual experience is the core of the contemporary travel. The tourist satisfaction and the appeal of a location are based on experiences, such as gastronomy and the authenticity of culture of each destination. During the covid-19 restrictions, the consumers even though they were forced to stay home, they continued to explore local culture, history and to get passionate about every county peculiarity, therefore it is compulsory to develop a narration of the destination. it is possible only through an active cooperation between every operator.

Internationalization

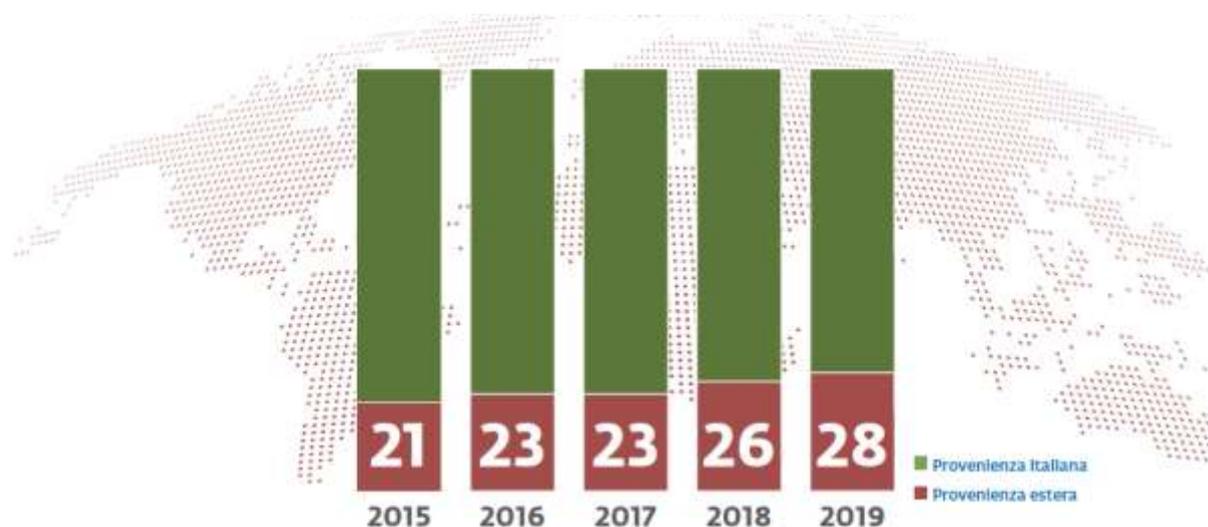


Figure 10: Internationalization rate arrivals by origin(%)

In 2019, the internationalization rate reached 28% for arrivals and 25% for presences / overnight stays. Compared to 2015, the internationalization rate of incoming has grown by 7 percentage points.

Puglia airports data 2019

- **Bari**
International flights: 2.4 million passengers (+ 17% compared to 2018) Domestic flights: 3 million (+ 4.5%)
- **Brindisi**
International flights: 717 thousand passengers (+ 18%)
Domestic flights: 1.9 million (+ 6%)
- **Topo 10 destinations from Bari:**
 - London Stansted, Budapest, Paris Beauvais, London Gatwick Munich, Bucharest Otopeni, Amsterdam, Wien, Krakow, Chaleroi
- **Top 10 destinations from Brindisi:**
 - Geneve, Bordeaux, London Stansted, Zurich Basel, Chaleroi, Frankfurt, Berlin Tegel, Eindhoven, Stuttgart, Beauvais

Top 15 foreign markets in Puglia³

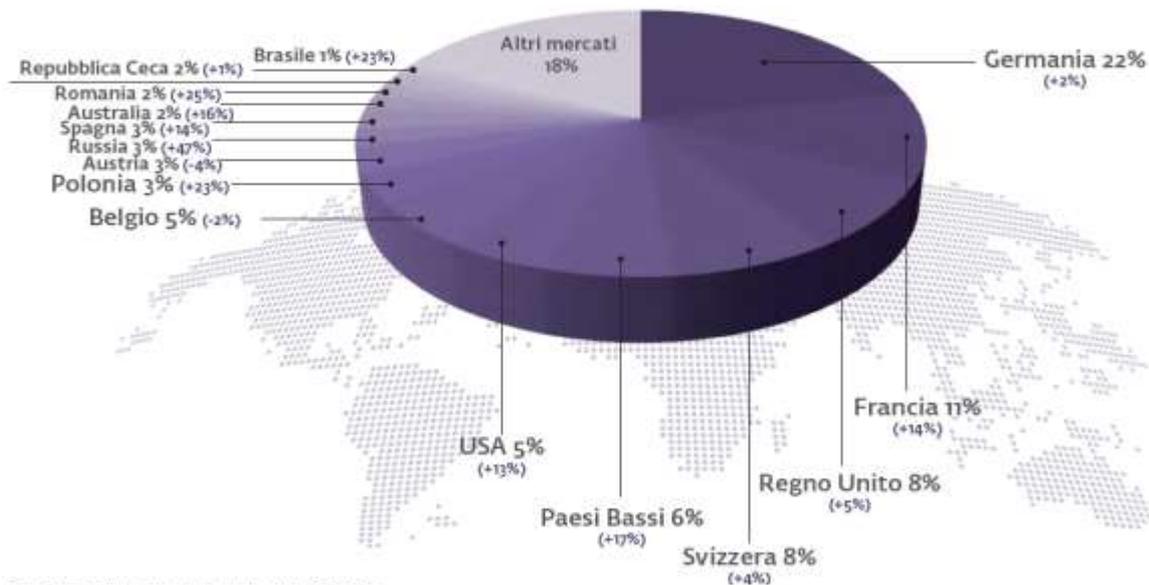


Figure 11: % Share of overnight stays- 2019

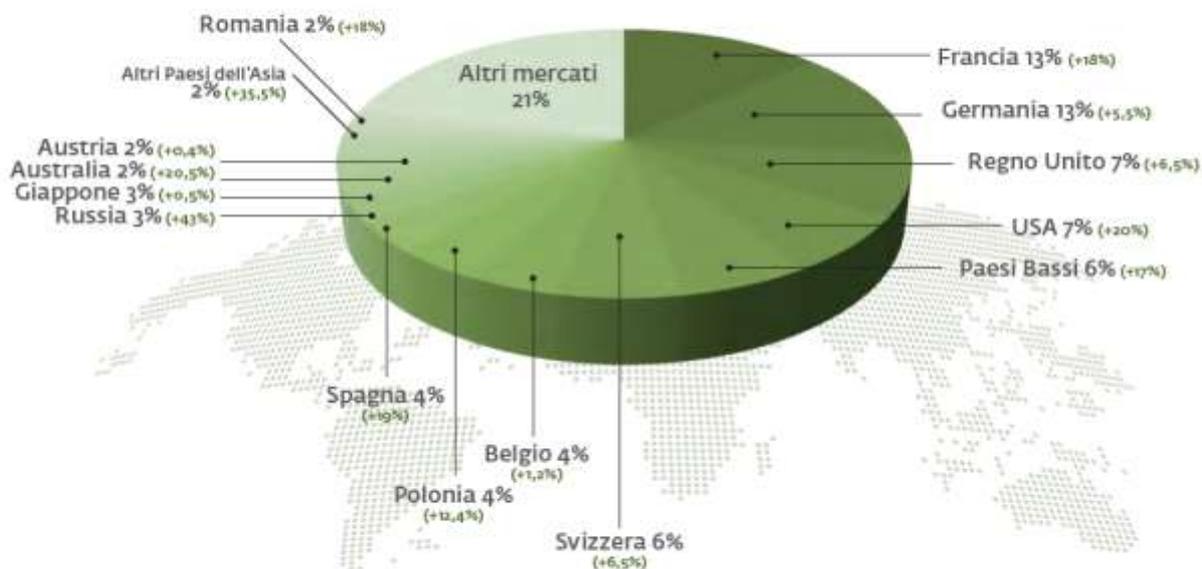


Figure 12: % arrivals per market -2019

³ Regional Tourist Observatory. Processing on ISTAT / SPOT data.

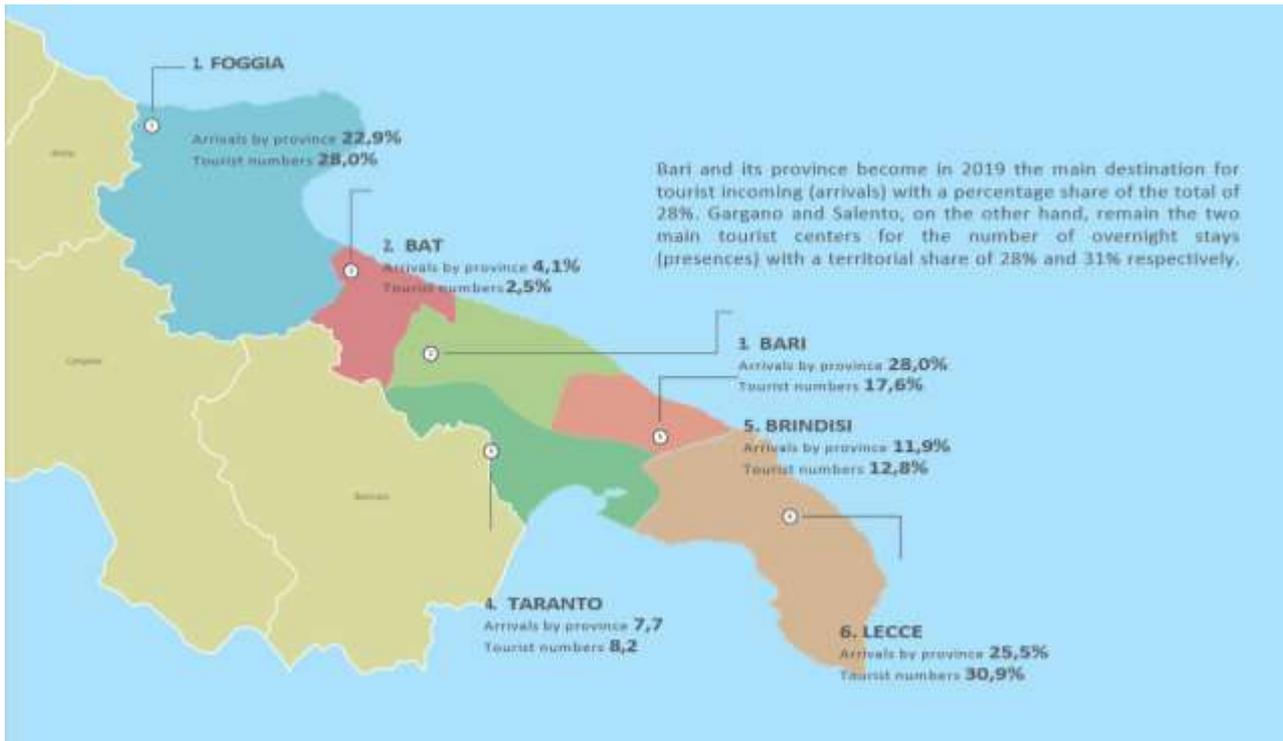


Figure 13: % share of arrivals/presences 2019

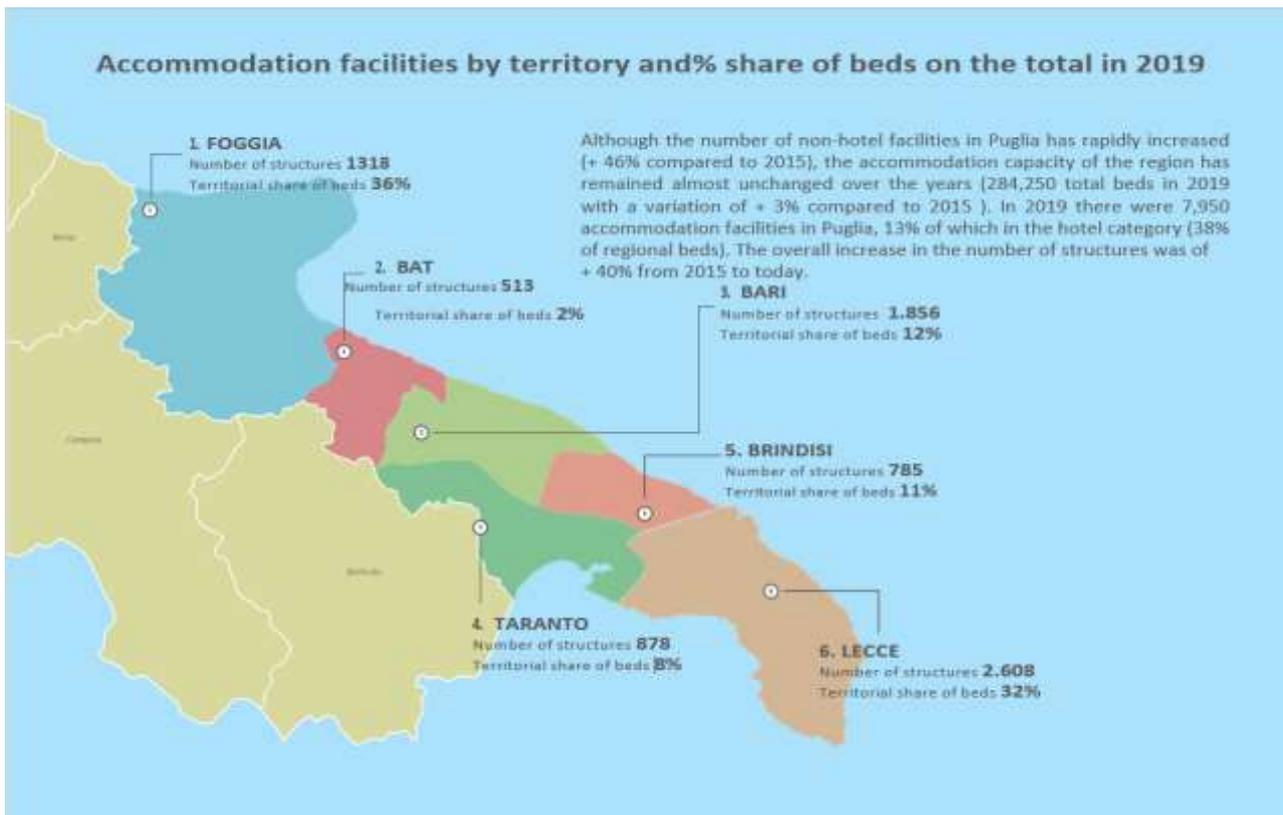


Figure 14: Accommodation facilities/ beds - 2019

Puglia, thanks to the presence of various habitats, is endowed with a remarkable natural heritage and diversity of species preserved by a careful regional policy of conservation, protection and enhancement of natural and environmental heritage.

The number of Sites of Community Importance in Puglia amounts at 78 and they occupy a land surface of 393.637,6 Ha, corresponding to 20,34% of the regional surface and a sea surface of 74.535,5 Ha.

The Special Protection Areas in Puglia are 21 and occupy a land area of 262,134 ha. National protected areas include 2 National Parks (188,586.5 ha), 16 State Nature Reserves (11,183.6 ha), 1 Marine Protected Area, 2 Marine Nature Reserves while regional protected areas include 12 Regional Nature Parks (54,711.5 ha) and 7 Oriented Regional Nature Reserves (5,889.7 ha). On the whole, the protected areas have a surface of 258.108,6 ha, equal to 13,34% of the regional surface on land, and 20.649,2 ha on sea. Three wetlands of international importance (Ramsar Areas) have been identified in Puglia: Le Cesine (620,00 ha), Saline di Margherita di Savoia (3.871,00 ha) and Torre Guaceto (940,00 ha). They enclose ecosystems of fundamental importance for avifauna as they are located on the route that migratory species of birds use to move from the African continent to the Eurasian continent and vice versa. The most extensive protected areas in Puglia are distributed mainly in the provincial territories of Foggia and Bari. Other important habitats can be found in the system of ravines that runs through the low Murgia of Taranto, in the riparian habitats of the Ofanto river in the province of Barletta-Andria-Trani and in the large wetland of Torre Guaceto in the province of Brindisi, while in the province of Lecce there are many small protected areas.

One of the most important aspects of the Molise Region is undoubtedly the numerous morphological commonalities of the territory considered: the territorial continuity of the municipal areas, reveals the characteristics that have favoured the development of agricultural areas with similar crops, but also an architectural conformation of urban systems resulting from the historical and demo-anthropological continuum. And it is, that considered, a territory in which urban systems are perfectly integrated in an articulated system of protected areas and nature reserves that, although they represent constraints and limitations to the anthropic presence, have in fact determined development policies over time (from the point of view of the location of productive settlements, of the functional integration between coastal areas of valuable and rural areas, tourist enhancement of natural resources and urban systems) with their remarkable historical, artistic and sustainable cultural heritage of the whole area. Such territory continues to acquire a strong tourism value, although it is necessary to continue to safeguard it with care and strong commitment from an environmental and eco-sustainable perspective.

An important environmental and tourist resource of Molise is the sea and its relative coastline within the regional boundaries. The Region faces on the Adriatic Sea with a coastline that stretches for ca. 36 km between the mouth of the Formale Canal of the Molino in the north and the mouth of the Saccione creek in the south. The major watercourses that flow along it are the Trigno and Biferno rivers and the Sinarca and Saccione streams. Finally, the coast is referable to a single large physiographic unit that is bounded to the north by P.ta Penna and to the south by P.ta Pietre Nere. However, the presence of the promontory of Termoli, which represents a clear element of separation, further reinforced by the port structure located there, leads to the division of the Molise coastline into two main sectors.

Proceeding from north to south along the Molise coastline are the beaches of Costa Verde, Marinelle, Marina di Petacciato, Litorale Termoli Nord, Foce dell'Angelo, Sant'Antonio, Rio Vivo, Marinelle, Campomarino, Marinelle Nuove, Nuova Cliternia and Ramitelli. These beaches, generally sandy and wide from a few dozen meters to a maximum of about two hundred meters, are bordered inward by dunes or are in direct contact with terraced or sloping hills, with coastal floodplains, or with land affected by anthropogenic structures and activities mainly related to building occupation and seaside enjoyment. Environmental integrity characterizes the entire Molise coastline; the coastal landscape regains in its entirety its natural characters with wide

branches close to the sandy shores and the preservation of the original agricultural use of the 'immediate hinterland.

The other coastal centers (Marina di Montenero, Petacciato marina, Campomarino lido) have present striking dunes colonized by the amphophilous species up to the typical littoral vegetation Adriatic, shady pine forests and equipped lidos on generally sandy shores.

Finally, the Molise coast is home to areas of considerable naturalistic value. With 18 habitats and 3 sites of Community Interest, it represents one of the most important areas in the Italian Adriatic for the biodiversity of sandy ecosystems. This heritage, however, is currently strongly threatened by progressive pressure from man, which results in loss of environments natural environments and species protected at the European level.

With regard to the sites of communal importance, in total there are 5 SICs, two of them in the immediate hinterland and both in Montenegro di Bisaccia.

MUNICIPALITY	DENOMINATION	SURF. (ha)	CHARACTERISTICS
Campomarino	Foce del Biferno	817	It is an area of contact between the fluvial and marine environment with the vegetational aspects of this habitat. The site ,in particular ,has a high number of habitats typologies typical of the coastal environment that have a good degree of conservation and representativeness. It is a staging area for a considerable ornithofauna and the river environment is also important for the ecology of the <i>Emys orbicularis</i> .
Campomarino	Foce Saccione - Bonifica Ramitelli	870	«
Montenero di Bisaccia	Colle Gessaro	664	Area with chalky formations deposited over the years characterized by a typical flora of Mediterranean xerici environments, identified as subspecies paths of grasses and rocky grass formations.
Montenero di Bisaccia	Calanchi di Montenero	121	Erosive forms typical of clayey soils that are formed as a result of the action of the waters. On the calanchive areas settle a flora consisting mainly of herbaceous plants, with dominance of grasses.
Montenero di Bisaccia	Foce Trigno - Marina di Petacciato	747	It is an area of contact between the fluvial and marine environment , the first is poorly preserved, the second has a better enviromental quality. The site is important for a large ornithofauna in some cases nesting.
Petacciato	Foce Trigno - Marina di Petacciato	747	«
Termoli	Foce Biferno - litorale Campomarino	817	It is an area of contact between the fluvial and marine environment with the vegetational aspects of this habitat. The site ,in particular ,has a high number of habitats typologies typical of the coastal environment that have a good degree of conservation and representativeness. It is a staging area for a considerable ornithofauna and the river environment is also important for the ecology of the <i>Emys orbicularis</i> .

Campomarino, Foce Saccione - Bonifica Ramitelli) are involved in LIFE MAESTRALE project and characterized by low sandy coasts alternating with small coastal alluvial plains and dune cordons, to which follows mobile dunes (habitat 2120). The attractions of this territory is due to the fact that the coastal dunes are characterized by high ecological diversity and variability of species characteristic of these areas. It is an area of great naturalistic and vegetational importance and represents one of the best examples of dunal environments, scarcely anthropized, of the Adriatic coast. While, the only area with special protection is the low course of

the Biferno river, characterized by a slow current and a dense development of vegetation and animal species. Molise is considered a cornerstone of development and connection of Italian transhumant activity. There are numerous tratturi, tratturelli, rests and taverns, and testimonies of huts, villages and architectural structures linked to transhumance and rural activities. Among these on the coast there are the tratturo L'Aquila - Foggia (44 Km) and Centurelle – Montesecco.

From a tourism point of view, it is very important to consider the entire regional territory. The small size of the Region, allows to quickly reach the different attractions offered by the territory. In a short time, from the coast it is possible to reach the hinterland to visit other resources. Considering the natural attractions, the Region is affected by areas of particular importance. There are:

- o Protected Natural Areas (1.52% of the regional area):
- o National Park of Abruzzo Lazio and Molise (Mainarde Sector);
- o Oasis (LIPU of Bosco Casale and WWF of Guardiaregia);

Natural Reserves, of which three at National (Collemuccio, Montedimezzo and Pesche) and one at regional level (Torrente Callora).

The Italian south and especially Puglia is the most maritime of the Italian peninsular regions, and not only for the exceptional extension of its coasts, which overlook two seas. With its major urban areas and centers located mainly along the coast and most of the rest within 25 kilometers of the coastal strip, Puglia is a structurally maritime region, not only in the geographic sense of the term, but also in the economic and social one.

The relationship of confidence of the Puglians with the sea is expressed in their daily life, in the language, in the cuisine, in the expressions of art, placing itself at the center of the collective imagination and assuming the value of an anthropological figure.

If we frame Puglia in a broader context, on a smaller scale, the frequent definition of "pier in the Mediterranean" is anything but a metaphor. The narrow arm of the Adriatic Sea and then the Ionian Sea, rather than separating, unites Puglia like a bridge to the facing Balkans, with which it has shared events, economic interests, flows of men and cultures since the earliest times. From the sea came fortunes and misfortunes, and Puglia historically owes to the sea what today would be defined as a role of geopolitical relevance, which is confirmed in the present times by a defensive, commercial, logistic-infrastructure point of view.

But those 860 km of coastline are today, above all, the most important asset of the Puglian tourist offer, both in terms of attractiveness and in terms of access to the territory and connection to the turistic systems of the macro-region, representing one of the major points of strength of the Puglian economy in the perspective dictated by the Blue Economy.

The railway endowment counts 1,261 km of FS line in operation, 81.4% of which are electrified. In addition, more than 60% is double-track and four regional railways for tourism that manage a total of over 800 km of network: Ferrovia del Sud Est, Ferrovie del Gargano, Ferrotramviaria, Ferrovie Appulo Lucane.

The role of airports and ports is also important. In 2019 in particular, the International airport of Bari has increased by 17% the number of international passenger-flights and 4.5% of passenger-domestic flights. Brindisi airport registered a similar increase of 18% and 6% of passengers international and domestic flights respectively.

The marine movement to Puglia from other countries and from the Aegean is very small because the potential source basins of customers (Greece, Turkey and African countries) are still characterized by a very weak outgoing demand.

The cruise movement is also much discussed because of the costs it entails: the present potential is not used, if it is true that Puglia is only the eighth region for the number of passengers handled, even though there are five possible berths. According to the Report on cruises in Italy and Europe by Risposte turismo, the Veneto region with only two moorings recorded, in 2016, 530 ship touches and 1.605 million passengers handled; Puglia with five marinas only 177 ship touches and about 409 thousand passengers. More relevant are the possibilities related to pleasure boating, with a total number of berths that in 2016 is about 14,200, equal to 9.0% national and 19.9% of those in southern Italy. Similar to that of Puglia, is the number of berths in Campania, with 14,739 units.

For these reasons, after a long and economic crisis and the new pandemic crisis, the future of the Region can only start from the sea, perhaps changing the perspective and looking at this Region from the sea.

The Regional System of Ports in Puglia

In 2005, the Framework Program Agreement on Local Development (II supplementary act) between the Ministry of Economy and Finance, the Ministry of Productive Activities and the Puglia Region entrusted to Sviluppo Italia (now the National Agency for the attraction of investments and business development - INVITALIA), the drafting of the "Feasibility study of the regional tourism port system", as the implementing body of the "National Tourist Port Network Program - First three-year plan for the regions of Southern Italy" pursuant to the Resolution CIPE 83/2003.

Over the last decade, the increasing demands of sustainability of economic development and protection of fundamental resources have dictated the Union and national directives, and have seen Puglia at the forefront of the national scenario for the adoption of the instruments of regulation and planning of the territory, the main ones being the Territorial Landscape Plan (PPTR) and the Regional Coastal Plan (PRC). The PRC in particular aims to "guarantee the correct balance between the safeguarding of the environmental and landscape aspects of the Puglian coast, the free use and the development of recreational tourist activities".

This new regulatory framework and a more careful sensitivity of the local communities, the technical structure and the decision-makers themselves have called into question the criteria initially adopted and generally lengthened the implementation process of the projects, adapting at the same time to the dynamics of the sector and of the territorial and macro-regional tourism market, that is rapidly changing, especially in the last decade.

Characteristics of supply and internal demand

The total number of moorings that are actually available in the region as of 9/2019 is 13,656, divided according to location, and consequent services, ashore in:

- tourist ports 3,323
- tourist landings 3,234
- mooring points 6,486

The subdivision of the moorings according to the size is as follows:

- <10 m / n.d. 10,609

- 10-24 m 2,907
- > 24 m 120

The number of vessels registered at the Peripheral Maritime Offices amounts to 12,031 units, divided as follows:

- boats (<10 m) 10,609
- boats (10-24 m) 1,336
- ships (> 24 m) 24

From the above numbers it would be deduced an excess of available moorings compared to internal demand, and therefore available for the reception of extra-regional vessels. In reality, some fundamentals must be made about the real relationship between shipping and moorings and therefore on the reception capacity of the Puglian yachting port system:

- a. the mooring points, which constitute the major part of global nautical receptivity, are actually often anchorages in the harbor (e.g., Porto Cesareo), of uncertain regulatory regularity, without services and not usable outside the favorable season, therefore completely non-standard for the pleasure craft of transit and not computable for the purpose.
- b. the category of nautical capacity includes the moorings of private associations which statutorily host their members and a limited number of external guests upon invitation or approval of the association, and are therefore essentially private moorings unavailable to tourism proper;
- c. on the demand side, the data of the ships completely lack small and very small unregistered units as they are not legally required, which UCINA estimates at 85% of the total and which, despite being in turn often put back in the so-called dry ports in private spaces of individual owners, however they occupy the berths in the season of greatest demand;
- d. to the total calculation of the real overall "nautical pressure", but not to the statistically formalized one, the boats registered outside the region that use the Puglian harbor as a permanent shelter, contribute significantly;
- e. a dynamic that are not well investigated is that of the units registered in the Puglian nautical registers but moored permanently, for various and interesting reasons, on the other side of the Otranto channel, mainly at the good ports of the Ionian Islands and marginally in Croatia, Montenegro and Albania, growing in recent years but tending to progressively decrease due to the leveling of tariffs with European standards and the difficulties in moving due to the pandemic emergency.

Characteristics of the tourist port demand

Currently the Puglian ports satisfy the tourist demand:

- mainly permanent: the number of berths intended for transit is approximately 540, equal to approximately 5% of the total berths available).
- proximity and residents: about half of the demand from boats in transit has a regional origin, in fact 50% of the concessionaires indicate the regional area as the "predominant origin of the boats in transit".

The analysis of the context shows that the Puglian destination can be characterized according to a modality

attributable to the great nautical itineraries as regards the Adriatic belt and to the nautical of medium and short routes for the Ionian belt.

The occupancy rate of the berths in the three summer months, as already mentioned, is close to 100%. Therefore, it is of fundamental importance to strengthen the offer both from a qualitative and quantitative point of view of the Puglian ports, and to put in place adequate interventions to create a virtuous synergy between the various ports and landings.

Already from the feasibility phase, sector planning has identified a "Network of Puglian tourist ports", organized in Areas in which Pivot Ports (of great appeal and size, well equipped with a wealth of services and functions) are identified, which attract the pleasure craft in transit, especially in the Adriatic, and to connect the sea to the territory by also enhancing the offer of the Puglian Tourist Itineraries (cultural, religious, food and wine).

All this must be done without neglecting the local and regional pleasure demand.

The Areas and the Pivot Ports of the Puglia Region tourist port network - First level ports and second level ports

The data collected relating to the infrastructural characteristics of the ports, together with a more detailed assessment of the tourist character of each individual locality, led to the identification of the candidate locations to represent the first level system of tourist ports and of those candidates to constitute the second level system.

The Areas:

The Puglian coast has been divided into seven areas (Garganico, Nord-Bari, Bari, Brindisi, Salentino-Adriatico, Salentino-Ionico, Tarantino) with reference to the following criteria:

- Nautical vocation (major international, regional or sub-regional nautical itineraries);
- An already consolidated image in the nautical tourism field;
- Geographical dimension as homogeneous as possible and such as to guarantee an adequately uniform distribution of pivot, first and second level ports;
- Possibility of agglomerating a critical mass of ports, suitably differentiated (between first and second level ports, with reference to the type of port demand - local or external);
- Reference as unambiguous as possible to local authorities and state bodies with expertise in the yachting sector (Coast Guard, Harbor Master's Office).



Figure 15: Network of Puglia Port system

A Port Pivot has been identified for each area, chosen on the basis of the following criteria:

- a) Potential of the locality in infrastructural terms (current and potential).
- b) Potential of the locality in terms of tourism (integrated tourist resource).
- c) Consideration of the individual realities and territorial specificities;
- d) Geographic location within the scope.

Area n. 1 - Garganico:

- Porto Pivot: Manfredonia
- First level ports: Vieste, Margherita di Savoia, Mattinata

Area n. 2 - North Bari:

- Porto Pivot: Bisceglie
- First level ports: Trani, Barletta, Molfetta

Area n. 3 - Bari:

- Porto Pivot: Bari
- First level ports: Monopoli, Mola di Bari

Area n. 4 - Brindisi:

- Porto Pivot: Brindisi
- First level ports: Ostuni

Area n. 5 - Salentino Adriatico:

- Porto Pivot: Otranto

- First level ports: Castrignano, Otranto, Castro, Santa Cesarea Terme, S. Foca

Area n. 6 - Ionian Salento:

- Porto Pivot: Gallipoli
- First level ports: Porto Cesareo, Nardò

Area n. 7 - Tarantino:

- Porto Pivot: Taranto
- First level ports: Maruggio

Area n.8 – Termoli:

- Porto Pivot: Termoli
- First level ports: Termoli

Area n.9 – Marina Sveva:

- Porto Pivot: Marina Sveva
- First level ports: Montenero Molise.

Current offer and prospective estimate in the identified areas

13 years after the original drafting of the Framework Program Agreement (APQ), the areas show a general delay in implementation and a varied situation of plans and planning, not without critical issues mainly due to:

- inconsistency and problematic integration of the projects - largely conceived in the 2000s - with the forecasts, constraints and new standards of quality and sustainability established by the mentioned regional strategic planning;
- poor reliability and transparency of the entrepreneurial team involved in some public-private partnerships;
- absence of an organic and strategic vision of the sector as a system
- lack of public governance

Nevertheless, it can be seen that in areas 1, 2, 4 and 5 there are mature plans and projects that are proposed for the start of works in the short term; among other things, these provide for actions to strengthen the Pivot Ports and some of the first level identified in the study.

On the other hand, in Sections 3, 6 and 7 they report a clear delay. This criticality is especially important for the ports of Gallipoli and Taranto.

It was positive to note that there are four significant upgrading interventions, two of which have started (Rodi Garganico and Polignano a Mare) and two are in the start-up phase (Manfredonia new tourist port and Lecce San Cataldo) with Project Financing involving consortia between public and private bodies, which testify a capacity of synergy between the business world and the public action.

These initiatives confirm that in Puglia the trend in demand for tourist ports is growing and that it is also able to attract private financial investments.

The Region of Puglia, being significantly larger than the Molise region is an amalgam of art, culture, landscape and traditions, the evidence of which can be witnessed and discovered throughout its territory.

Below are some figures of these elements divided by categories and their provincial distribution.

	BARI	BT	FOGGIA	BRINDISI	LECCE	TARANTO
Museums	48	20	31	16	22	11
Libraries	253	19	99	44	155	62
Theaters	24	5	17	7	13	9
Castles	15	8	16	13	35	9

Figure 16: No of attractions per type

Rocky Habitat

Rock settlements are environments created in the rock (caves) in which civil and religious life developed. This form of settlement has several testimonies in the region and concern the area of:

- Taranto north-west including the municipalities of *Massafra, Mottola, Palagianello, Castellaneta, Laterza e Ginosa*.
- The rocky habitat of the High Murgia: which includes the municipalities of *Gravina di Puglia, Altamura* and *Matera* (Basilicata Region). The rock civilization is the result of a long process of anthropization of the Murgia territory furrowed by the dense sequence of narrow incisions, deep depressions and tortuous crevasses: The Ravines (*Le Gravine*).
- The rocky habitat of the coastal Murgia: with significant examples of the coastal Murgia in the route between *Monopoli - Fasano*, where the jaggedness of the coastline and the absence of marshy and malarial areas have attracted, near the blades, the coastal population and a testimony of one of the largest Puglian dolines that is located a few kilometers from the city of *Molfetta*, "*il Pulo*".

In regards to the natural heritage of the Puglia and Molise Regions, thanks to the presence of various habitats, is endowed with a remarkable natural heritage and diversity of species preserved by a careful regional policy of conservation, protection and enhancement of natural and environmental heritage.

The number of Sites of Community Importance in Puglia amounts at 78 and they occupy a land surface of 393.637,6 Ha, corresponding to 20,34% of the regional surface and a sea surface of 74.535,5 Ha.

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the province of Barletta-Andria-Trani and in the large wetland of Torre Guaceto in the province of Brindisi, while in the province of Lecce there are many small protected areas.

In regards to the Molise Region the focus is put in the NT infrastructure. The most significant port of the coast is the Port of Termoli which is not only a tourist facility, but also a fishing, passenger, industrial and commercial port. It has an annual passenger flow of about 240,000 people.



It is also the only commercial port in the Region is Termoli (passenger, fishing and pleasure boat). It extends for 45000 square meters and employs many operators. It is the only one connected all year round with the Tremiti Islands.

The port of Termoli welcomes citizens and tourists, both in summer, when tourists embark to Tremiti Islands, and in winter, when the fishing boats bring the fresh fish to Fish Wholesale Market. It port is located at the foot of a rocky upland on the sea and it consists of two basins, one exterior and the other interior. The inner basin is enclosed between the south dock, partially paved, the quay and the pier of the north dock. The docks have the following destinations: pleasure boats, fishing boats, passenger ships, shipbuilding and commercial activities. At the southern dock there is also the old lighthouse. Along the south dock it is also located the tourist port of Marina di San Pietro. This port is a welcoming and elegant infrastructure, characterized by 4 jetties and two docks and it permits the mooring up to 300 boats, from 8 to 30 meters. The yachtsmen find in Marina di San Pietro many services dedicated to them: technical area, showers, bicycle rental, accompanying service to the embarkation points of the motorboats as well as various occasions of refreshment and fun. Marina di San Pietro Marina is built under the bastion of the Termoli's historic center and it is open to the public since September 2009. Parking is subject to a charge. The tourist port is often a scenario of sporting competitions such as National Regatta Class of Optimist organized by the nearby Circolo della Vela. Hundreds of boaters, each year, choose Marina di San Pietro as a stopover for their trip to discover the Adriatic Sea, Termoli and Tremiti Islands.

In recent years is also built the tourist port Marina Sveva which is located half a mile north of the Trigno river's mouth, in Località Costa Verde, near the seaside of Montenero di Bisaccia and it is nested in the heart of a fascinating gulf that brings together the splendid towns of Vasto and Termoli. The Marina Sveva' Port is characterized by technology, innovation, waste reduction and active green systems: a sustainable last-

generation water treatment plant that collects and recycles rainwater, a system for pumping, treating, and disposing of waste water and bilge water, self-sufficient hot water systems fed by solar panels, anti-pollution treatments for the bunkering area and for the water used to wash boats, thus saving drinking water. The entire construction contributes to the marina's environmental friendliness and is tied to an extraordinary natural heritage protected in the interest of the community. The Marina Sveva' Port consists of 7 floating docks, which can accommodate up to 446 pleasure boats of a maximum length of 30 meters. There are many services available both to boats and yachtsmen. In order to satisfy the requirements of every ship owner, and while ensuring a level of excellence in our services, Marina Sveva has put together a uniquely broad and varied offer enhanced by an avant-garde structure from both an architectural and functional point of view. Marina Sveva offers a brand-new port structure that can be used as an exclusive and functional location by sea lovers who are looking for a peaceful escape, be they yachtsmen, boaters, sailors, tourists, or simply visitors wishing to relax. The last port realized in Molise is the tourist port Marina di Santa Cristina located in Campomarino Lido. Recently restored, it is reopened after two years of closure in 2012. A few years ago, it is back in full activity available to all yachtsman, with price list and current disciplinary. The structure today brings a new name in honor of the patron Saint St. Christina. Thanks to the interventions financed by the Municipality of Campomarino, the structure is operational. In fact, such interventions have solved the problem of sand cover up due the low level of the sea and have followed all safety requirements. The field of pleasure boating continues to have its importance, despite the economic crisis. The tourist port of Marina di Santa Cristina is the third port in Molise Region and it was created a synergy between the single structures of Molise coast. The infrastructure has a total of 500 berths. Currently, the outer structure arms have been completed, traps were set to catch the sand and to dredge, all the services necessary for navigation are guaranteed.

According the report of the Ministry of Transport "Diporto Nautico in Italia 2017", the statistics on the infrastructural facilities for pleasure boating confirm the already detected significant deficiencies of Southern and Insular Italy compared to the rest of the country, highlighting, at the end of 2017, an average number of berths per kilometer of coast equal to 12.5 in the South, compared to 70.3 in Northern Italy and 30.1 in Central Italy. In particular, referring to the data of the Molise Region, for the 36 km of the coast there are 587 berths which represent the 0.4% of the national total.

These berths are concentrated in Termoli and distributed as follows: 434 berths in the tourist harbor and 153 in the tourist marina.

Transport in the Italian Intervention Area

The tourist system appears more and more like a complex network of subjects (public administrations, private operators, individual citizens) between which increasingly close and diverse relationships exist, whose solidity and efficiency can compromise the competitiveness of a territory.

Within this complex network of subjects and relationships, different levels can be identified, integrated with each other:

- physical networks, in particular the infrastructures linked to transport to and from the destination;
- technological networks, to support tourist use and local operators;
- relational networks, which involve all actors, public and private, of tourism development.

Boating is, due to the geographical characteristics and cultural contents of Puglia, the most appropriate approach and the privileged gateway to this Region, but to be truly an integral part of the Puglia system it should fully fit in and at all levels of the networks that connect it externally and internally. Starting with that

of transport.

Puglia has on its side, among its intrinsic geographical characteristics, a "form factor" that makes its ports close to the innermost parts of its territory, and its most hidden treasures within the reach of the coastal tourist with short and easy trips. even with sustainable means such as the bicycle.

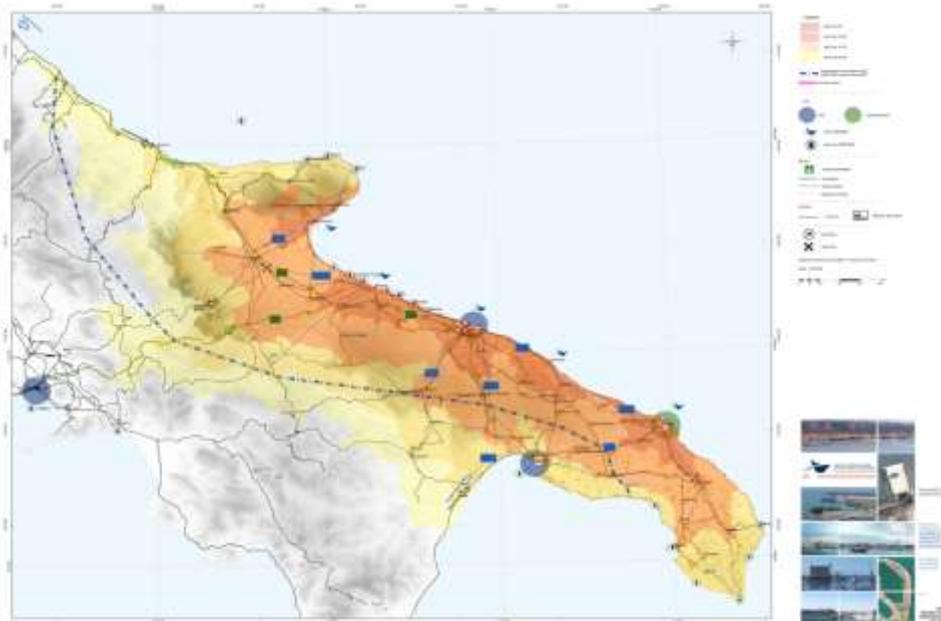


Figure 17: Isochrone and equidistance line Southern Adriatic Port system Authority



Figure 18: The Public transport network and the Hubs in Puglia

Generally speaking, a strategy based on a regional intermodality plan is needed, capable of involving the main means of transport and airports (airports, railways, buses, ports and marinas, bicycle and car rental), according to the standards of the European tourism market, through more efficient road and rail links between airports and tourist resorts, connecting with the high-speed rail network.

But above all, as the most advanced design standards provide, it is necessary to equip tourist ports and marinas

with connection hubs with the soft mobility network, with velostations and relative cycle paths, to connect them in an engaging way to the cities and territories that act as hinterlands, not just physical at the docking.

It is necessary to avoid tourist ports in an open way to the territory and really point of access for tourists, and not just berths for the resident, and then connect them, with public and private carriers efficiently sized in scope, to other hubs from rail to airport ones.



Figure 19: The new railway connection with the airport of Brindisi

The specificities of southern Puglia

The tourist districts established by the Puglia region are: Gargano and Monti Dauni, Bari and the coast, The Puglia of Frederick II, Valle d'Itria and Murgia dei trulli, Magna Grecia and Gravine, Salento.

Below is a description of the Salento tourist district which traditionally includes the province of Lecce and the southern areas of the provinces of Brindisi and Taranto. More of an island than a peninsula, it has strong traditions of seafaring and hospitality, and together with the Gargano it leads the region in terms of both receptivity and turnover in tourism, catering and related economic chain.

There are 30 classified ports and harbors, described in the relative cards in attachment 1

Comune	Numero di posti barca	Porto turistico	Approdo turistico	Punto di ormeggio	N° licenze (*)	Attracco	Acqua	Luce	Carburante	Vigilanza	Info turistiche	Servizi Igienici	Parcheg- ggio	Alaggio	Rifiuti	Capitaneria di Porto
Maruggio TA	240	-	240	-	1	100	100	100	100	100	100	100	100	100	100	Taranto
Alessano LE	10	-	-	10	-	-	-	-	-	-	-	-	-	-	-	Gallipoli
Andrano LE	44	-	-	44	1	100	-	-	-	-	-	-	-	-	-	Gallipoli
Castrignano del Capo LE	680	680	-	-	1	100	100	100	100	100	100	100	100	100	100	Gallipoli
Castro LE	171	-	-	171	8	100	100	100	-	100	100	100	100	100	100	Gallipoli
Gallipoli LE	1.084	280	210	594	15	100	59	54	30	75	15	35	54	30	100	Gallipoli
Lecce	102	-	-	102	1	100	-	-	-	100	-	100	-	-	-	Gallipoli
Melendugno LE	466	150	144	172	5	100	100	100	15	100	32	63	72	63	48	Gallipoli
Morciano di Leuca LE	160	-	160	-	1	100	100	100	-	100	100	100	100	-	100	Gallipoli

Otranto LE	504	225	-	279	7	99	99	97	1	97	97	99	-	2	50	Gallipoli
Porto Cesareo LE	927	-	-	927	7	100	80	80	4	80	-	83	80	13	100	Gallipoli
Salve LE	106	-	106	-	-	100	100	100	-	-	-	-	-	-	100	Gallipoli
Santa Cesarea Terme LE	60	-	-	60	2	100	-	-	-	100	-	-	100	100	100	Gallipoli
Squinzano LE	10	-	-	10	1	100	100	100	-	100	-	100	100	100	-	Gallipoli
Tricase LE	241	-	241	-	4	100	91	91	-	92	-	77	71	77	-	Gallipoli
Ugento LE	361	-	-	361	4	100	75	75	-	100	-	25	-	-	100	Gallipoli
Brindisi	1.103	-	928	175	6	100	90	89	58	89	84	84	84	58	90	Brindisi
Fasano BR	215	-	50	165	1	100	56	-	-	58	-	-	23	42	100	Brindisi
Ostuni BR	290	-	-	290	-	100	87	87	-	87	11	49	76	89	100	Brindisi
Termoli	312	-	-	245	-	100	-	-	-	-	-	-	-	-	-	Termoli
Marina Sveva	164	-	-	-	-	100	-	-	-	-	-	-	-	-	-	Termoli

Figure 20: Ports in the Italian Area

A feature of all landings is that they are almost always central to the coastal tourist centers and therefore able to benefit from services and tourist attractions within reach of the quay, as well as nautical excursion services along the neighboring coast.

A dense network of pathways is spread over the territory, centering on the major coastal cities and traveling along the coast (CYRONMED circuit), increasingly safe and usable with the pedestrianization of the coast and innervating towards the hinterland as in the case of the "Salento di Mare" Cultural Environmental System. and Pietra2, where about 400 km of marked and slow-speed roads link Gallipoli by bicycle to the cultural heritage of 13 municipalities, served by stopping points and assistance to cyclists. Coastal are also all the natural parks of southern Puglia, where most of the 30 hiking trails of the Provincial Hiking Network develop, which take us into the heart of the unique nature of this land.

Even the longer-range connections to the most internal and authentic areas, the cities of art or the more distant coastal centers are guaranteed in the summer months by the car connections of the SalentoBus program promoted by the Province of Lecce, which covers a time slot ranging from five in the morning until one in the morning, so that no appointment is missing from the rich program of music and festivals typical of this land.

Another strong point, in addition to the urban redevelopment works and the monumental and natural heritage, is the decisive growth of widespread accommodation, b & b and rural tourism, which gives authenticity to the experience and above all flexibility to the offer, being able to use even for very short periods and by booking your accommodation last minute according to the typical needs of the nautical yachtsman. Strong critical issues remain in the planning and management of port spaces, docks and stretches of water, disputed between fishing mariners and nautical associations which in fact privatize most of the useful fronts available, making the use of public moorings for pleasure boating in transit problematic.

Even the marinas and private moorings report a series of critical issues regarding the obsolescence of port structures, almost all conceived in the 1960s and 1980s, almost always lacking in technology and services, not just materials, which are really usable.

The number of berths available for transit are also modest and often fictitious, and the rates are not competitive or proportionate to the quality offered.

This has motivated in recent years a strong spill-over of local demand towards more advantageous destinations such as Greece, which in the meantime has strongly strengthened the nautical sector in terms of capacity, updating and quality of services, resulting in a highly attractive and competitive international demand despite the recent realignments in costs to the European sector market.



Figure 21: Connection between the hubs of Puglian Transport Network

In the short term, concrete prospects concerning the railway sector come from the important planning (about 700 million with construction sites to be closed by 2024) implemented by the Puglia Region with the technological and environmental adaptation of the vast and widespread network of local railway lines (FAL, FdG and FSE) and equally immediate and ambitious projects put in place by RFI itself in connection with the port and airport nodes of Bari, Brindisi and Taranto.

Equally important when focusing on tourism and visitability is the entertainment and amusement side of facilities. To this extend here are presented the main entertainment infrastructure as follows:

Acquapark Ippocampo

The park is located in the municipality of Manfredonia, and is easily accessible from the state road 141 Delle Saline to Manfredonia. The park, offers sports activities, music, with the disco working both day and night. The park occupies an area of about 25,000 square meters and is provided with a lot for 800 cars,

Acquafolies

Located in the province of Taranto can be reached from the Ionian coast road or the provincial roads near Pulsano (TA).

It consists of a semi-Olympic swimming pool and several water games, slides and attractions for both adults and children. A staff of animators organizes daily events and initiatives for the amusement of the park's guests. There are various relaxation areas with large green spaces, dining corners, toilets and a large parking lot.

Felifonte

Another amusement park is the Felifonte, which is located in Castellaneta Marina province of Taranto. The park offers attractions for adults and children, such as the strobe wheel, pony riding, inflatable areas. Of course, there are also shows, entertainment and a well-equipped catering area.

Zoosafari e Fasanolandia

The Zoosafari of Fasano is the largest wildlife park in Italy and one of the largest in Europe. It hosts about 1,700 specimens of 200 different animal species - it also includes a water park, with over 25 attractions, museums, shows and suggestive paths to follow. The structure is located in the outskirts of the city of Fasano, in the province of Brindisi and about 40 km from Bari.

Curti Petrizzi Landia

The park is located in Cellino S. Marco in the province of Brindisi. It includes a large wooded area with entertainment of various kinds, a mini zoo and a brand-new aqua park with 3000sqm of swimming pools, slides for young and old, but also massage service and an entertainment team capable of cheering up your days with games and group dances.

Splash Park

The Splash Park offers its guests a wide choice of water slides for both adults and children. The park also offers a special area dedicated to the infants the Fabilandia. It also provides entertainment and shows such as Afroaerobics and foam party. The structure is located on the coastal road to Santa Maria al Bagno di Rivabella, in the province of Lecce.

Felisia

Felisia is a park structured for thematic routes, such as the evocative Center of the Powers of Nature, which includes laboratories, tunnels and technological equipment that control the planet's moods and the most striking natural phenomena: earthquakes, volcanic eruptions, cyclones, storms. The structure is located in Castellaneta Marina in the province of Taranto.

Adrenalin Zone

It is an acrobatic structure consisting of 60 different passages up to 12 meters high and a breathtaking ropeway with 55% slope. It is a set of high-altitude skill passages, articulated in 5 routes of increasing difficulty. The structure also includes a restaurant-pizzeria and is located in the district Scizzo, Poggioallegro in the province of Bari.

Boscosauro

A nature park for children. It is located in the territory of the city of Altamura (BA) and is presented as a nature trail where children can discover the dinosaurs that millions of years ago had left their footprints on the Murgia Plateau: there are no less than 30000 footprints dating back to 70 million years ago. The park also offers a path with educational activities such as working with clay, paper etc.

The Dinosaur Park and the Paleontological Museum

The park is located in Brogo Celano near San Marco in Lamis province of Foggia. It's located on about 21,000 square meters and inside houses a multimedia museum with the room of sensations and a beautiful museum on garganic karst. Along the path of 2400 meters between local plants and ponds can be seen the fossil footprints, and 27 full-size specimens of animals that have populated these territories in the Cretaceous period.

Adventure Parks:

Chinunno in Altamura (BA), Park of Briganti in Santeramo in Colle (BA) with tactile paths, barefoot trails and hanging among the trees, relaxation areas, picnic and paths immersed in nature.

In regards to Albania unfortunately we don't have the same level of information. However, it's been recorded that in 2018, there are 2,437 active accommodation facilities in the country, of which 65% of the total are hotels and the rest are houses and rooms for rent. In addition, according to National Business Center data, 75 tour operators and 322 travel agencies are licensed in the country with different distribution in the regions, with most concentrated in Tirana.

A similar profile can be highlighted in Montenegro where according to MONSTAT data in 2019, Montenegro holds about 49,000 beds referred to facilities including: hotels, campsites, resorts, vacation facilities, guesthouses, motels, inns etc., while a percentage distribution according to the quality of these facilities in Montenegro shows that about 49% of hotels in the country are of high-quality fig 30.



Figure 22: Percentage distribution of accommodation facilities by category

Due to the high level of comfort and content, hotel capacities with 4 and 5 stars generate the highest economic effects for GDP, employment rate and income. However, in recent years, there has been a new trend of renting apartments and private villas, which has reduced the utilization of hotel capacities. A new trend in tourism is present, which involves booking accommodation in households so that the guests can feel the spirit of culture, hospitality and the way of life of their hosts. However, this raises issues of the legalization of accommodation and accommodation units, as well as tax regulation of tourist traffic.

The Government encourage the tourism industry in the realization of projects for construction of facilities and improvement of the offer, which is, raising the categories of 4-star and 5-star hotels. With the aim of creating a high-quality offer, the state has envisaged simulative measures for real estate taxes. The Real Estate Tax Act states that non-categorized buildings are taxed at a rate of 5 to 5.5% of the market value of the real estate property. 1-star category is taxed from 4 to 4.5%, 2-star category from 3 to 3.5%, 3-star category at a rate of 2 to 2.5%. The state has anticipated possible tax reduction for 4-star category up to 30% and 70% as an incentive development measure. By these measures, the state seeks to improve the offer or encourage hotel owners and businesses to use loans and provide funds they will invest in higher-category hotels in accordance

with the standards of tourism activity and contemporary trends in tourism development. However, hotel owners and businesses do not think of this simulative measure as a progressive measure, but the inability of a 3-star hotel to survive on the tourism market.

The most significant port of the coast is the Port of Termoli which is not only a tourist facility, but also a fishing, passenger, industrial and commercial port. It has an annual passenger flow of about 240,000 people.

It is also the only commercial port in the region is Termoli (passenger, fishing and pleasure boat). It extends for 45000 square meters and employs many operators. It is the only one connected all year round with the Tremiti Islands.

The port of Termoli welcomes citizens and tourists, both in summer, when tourists embark to Tremiti Islands, and in winter, when the fishing boats bring the fresh fish to Fish Wholesale Market. Its port is located at the foot of a rocky upland on the sea and it consists of two basins, one exterior and the other interior. The inner basin is enclosed between the south dock, partially paved, the quay and the pier of the north dock. The docks have the following destinations: pleasure boats, fishing boats, passenger ships, shipbuilding and commercial activities. At the southern dock there is also the old lighthouse. Along the south dock it is also located the tourist port of Marina di San Pietro. This port is a welcoming and elegant infrastructure, characterized by 4 jetties and two docks and it permits the mooring up to 300 boats, from 8 to 30 meters. The yachtsmen find in Marina di San Pietro many services dedicated to them: technical area, showers, bicycle rental, accompanying service to the embarkation points of the motorboats as well as various occasions of refreshment and fun. Marina di San Pietro Marina is built under the bastion of the Termoli's historic center and it is open to the public since September 2009. Parking is subject to a charge. The tourist port is often a scenario of sporting competitions such as National Regatta Class of Optimist organized by the nearby Circolo della Vela. Hundreds of boaters, each year, choose Marina di San Pietro as a stopover for their trip to discover the Adriatic Sea, Termoli and Tremiti Islands.

In recent years is also built the tourist port Marina Sveva which is located half a mile north of the Trigno river's mouth, in Località Costa Verde, near the seaside of Montenero di Bisaccia and it is nested in the heart of a fascinating gulf that brings together the splendid towns of Vasto and Termoli. The Marina Sveva' Port is characterized by technology, innovation, waste reduction and active green systems: a sustainable last-generation water treatment plant that collects and recycles rainwater, a system for pumping, treating, and disposing of waste water and bilge water, self-sufficient hot water systems fed by solar panels, anti-pollution treatments for the bunkering area and for the water used to wash boats, thus saving drinking water. The entire construction contributes to the marina's environmental friendliness and is tied to an extraordinary natural heritage protected in the interest of the community. The Marina Sveva' Port consists of 7 floating docks, which can accommodate up to 446 pleasure boats of a maximum length of 30 meters. There are many services available both to boats and yachtsmen. In order to satisfy the requirements of every ship owner, and while ensuring a level of excellence in our services, Marina Sveva has put together a uniquely broad and varied offer enhanced by an avant-garde structure from both an architectural and functional point of view. Marina Sveva offers a brand-new port structure that can be used as an exclusive and functional location by sea lovers who are looking for a peaceful escape, be they yachtsmen, boaters, sailors, tourists, or simply visitors wishing to relax. The last port realized in Molise is the tourist port Marina di Santa Cristina located in Campomarino Lido. Recently restored, it is reopened after two years of closure in 2012. A few years ago, it is back in full activity available to all yachtsman, with price list and current disciplinary. The structure today brings a new name in honor of the patron Saint St. Christina. Thanks to the interventions financed by the Municipality of Campomarino, the structure is operational. In fact, such interventions have solved the problem of sand cover

up due the low level of the sea and have followed all safety requirements. The field of pleasure boating continues to have its importance, despite the economic crisis. The tourist port of Marina di Santa Cristina is the third port in Molise Region and it was created a synergy between the single structures of Molise coast. The infrastructure has a total of 500 berths. Currently, the outer structure arms have been completed, traps were set to catch the sand and to dredge, all the services necessary for navigation are guaranteed.

Accordinging the report of the Ministry of Transport “Diporto Nautico in Italia 2017”, the statistics on the infrastructural facilities for pleasure boating confirm the already detected significant deficiencies of Southern and Insular Italy compared to the rest of the country, highlighting, at the end of 2017, an average number of berths per kilometer of coast equal to 12.5 in the South, compared to 70.3 in Northern Italy and 30.1 in Central Italy. In particular, referring to the data of the Molise Region, for the 36 km of the coast there are 587 berths which represent the 0.4% of the national total.

These berths are concentrated in Termoli and distributed as follows: 434 berths in the tourist harbor and 153 in the tourist marina.

6.2 Albania

Albania is characterized by an important number of natural attractions including nature park, protected areas wetlands etc. There are 2000 cultural monuments and the historical centers of Berat Gjirokastra and Butrint are listed as UNESCO World heritage sites.

The attraction list also includes the archaeological parks of Apollonia, Shkodra, Bylisi, Amantia and national museums in Tirana, Kruja (Museum "Gjergj Kastrioti Skanderbeg" and the Ethnographic Museum), Berat (the Iconographic Museum "Onufri" and the Ethnographic Museum), Shkodra (Marubi Museum), Korça (Museum of Medieval Art).

On the Albanian area, the ports are mostly lying in the western lowlands. They are divided into two main typologies:

- a. Industrial ports include ports for the transport of goods and people,
- b. Naval ports include tourist ports and former military ports.

It is planned to propose many small ports in existing villages and towns or in new tourist groups around historical sites (Porto Palermo castle) in order to increase maritime tourism, to visit attractive places and to observe the entire coast of the country. Actually, there are cruise ship arrivals in Sarande.

Port of Durres

The Port of Durrës is the principal port in Albania, handling roughly 90 percent of the country’s international maritime trade tonnage and 85 percent of all the export and import trade of the country. As a vital interface of the country on the Adriatic coast, linking Albania with other Mediterranean countries and Balkan countries, it opens up the country to an additional market of 40 million people. The importance of the Port of Durrës to the Albanian economic development cannot be understated. It directly employs 600 persons. Indirectly, however, it creates thousands of jobs in the transportation, distribution, and banking industries. The current level of traffic is about 3.8 million tons of cargo per year and approximately 80,000 passengers. Durrës is owned by the state, controlled by the Ministry of Infrastructure and Energy It is managed and operated by the Durrës Port Authority.

Port of Vlora

The port of Vlore is located about 5 km from the center of Vlora, about 120 km from Sarande. The main town is a commercial port of entry, busy with ferries and other traffic. It is the second largest port city of Albania, after Durrës. Vlore remains a major seaport and commercial center, with a significant fishing and industrial sector.

The best beaches are located between Vlora and Saranda, often surrounded by pine forests and olive groves, and are characterized by very fine golden sand.

The Port of Vlora is the second largest in the country. Vlore comprises a dry cargo port, the Vlore 1 petroleum port and a fishing harbour. The Port is considered as part of the Lungomare in Vlorë. Part of this project is the construction of a yacht port, while the new Trans-Balkan Road Cultural Corridor, which has been completed, will be added a second segment that starts from the existing road to the port.

Port of Shengjin

Shëngjin Port, is the northernmost seaport in Albania and is frequently accessed by cargo and fishing vessels. The Port provides the area with a strong industrial foundation. Shëngjin has the third largest port in Albania and the Harbor's access point is located on the northwest part of the city. The port is protected by lengthy rock walls that extend into the sea. A well sheltered outer harbour is surrounded by popular holiday beaches. Shëngjin has approximately 3 km of beach front

Port of Saranda

Saranda Port is the southern port of entry into Albania. The port has been renovated and extended making it possible for cruise ships to moor. It's very close position to Corfu (only 6 miles) makes it a favorable and frequented port by sailors not only to clear into Albania but also to visit the surrounding area which has indeed a lot to offer to its visitors.

Orikum Marina

It is located at the south end of Vlora Bay. The Marina has all the usual facilities, and it is pretty safe to leave the boat. There is water and electricity to all berths. Nice sandy anchorage

Himara port

Himara is a coastal town in southern Albania, 22 miles (35 km) from Sarande. Himara has a small fishing port, which doesn't offer good wind or swell protection but you can stay in good weather and enjoy visiting the bilingual town.

Porto Palermo

Porto-Palermo Bay is just 15 miles north-west of Sarande, a few kilometers south of Himara along the Albanian Riviera. The water is deep here (30m plus) almost up to the old fish quay hidden behind the northern side of Ali Pasha's fortress. A useful stopping point and a much-protected bay.

6.3 Montenegro

For a successful Touristic Development, it is required that nautical guests must find everything that the most demanding tourists are looking for (restaurants, cafes, discos, nightclubs, casinos, sports facilities, shops, etc.), because it serves them as a supplement to the experience of sailing. It is necessary to develop selective forms of offer based on sports, recreational, entertainment and cultural programs, including specific offers such as:

Biking Herceg Novi Municipality

The wealth of experiences that Orjen Nature Park selflessly offers will be extremely complete and experienced "on two wheels", by direct contact with nature. Depending on the degree of physical readiness, experience, wishes and interests of the tourists themselves, various bicycle tours can be found on offer. Certainly, this is a destination that leaves breathless all lovers of active holidays and lovers of pure and untouched nature.

Spaleology – Municipality of Herceg Novi

Orjen mountain is very rich in speleological objects and as such represents a real paradise for practicing these sport-scientific disciplines. Cave-type objects predominate. The deepest pit is 662 m deep.

Walking and Trakking in Municipality Herceg Novi

The Herceg Novi hinterland has a very diverse and high-quality network of marked mountain trails, both hiking and walking, in total more than thirty trails, mostly located within the Nature Park "Orjen".

Finally, in regards to the Montenegro area the available details on infrastructure consist on information about the ports. Apart from many small private moorings in front of taverns and hotels, the larger marinas offer an increasingly large number of berths. This is in response to the international boating public's more discerning tastes. Presently Montenegro has 2,000 berths for boats, yachts and mega-yachts. The demand for moorings is predicted to double in the near future due to increase demand for permanent and visitor berths. Yacht charter companies boat hire stations are included in this demand and are located in Bar, Budva, Kotor and Herceg Novi.

Port of Herceg Novi

The harbour of Herceg Novi is a popular destination for nautical tourism with more than 1,000 yachts visiting Herceg Novi annually. A sailing club uses part of the harbour privately and another part of the harbour is used exclusively for traditional fishing boats. Additionally, a show basin for public events such as swimming and water polo is integrated into the harbour. On the inner side of the historical breakwater, moorings are provided for yachts allowing room for approximately 20 to 30 visiting yachts up to about 25metres in length. The pier is equipped with electricity and fresh water supply. Both utility charges are calculated separately to marina berth charges. All other supply facilities, such as supermarkets and retail shops, can be found in the town above the harbour. Fuel is available at the innermost part of the port. A busy restaurant is located on the south breakwater and additional restaurants are nearby

Lazure Marina

Lazure Marina & Hotel reside on the Adriatic coast of Montenegro at the entrance to the picturesque Kotor bay, next to the beautiful medieval city of Herceg Novi.

Supplemented by a boutique hotel housed in a renovated 18th century building, spacious residences, Mediterranean restaurants, and a wellness centre, the Lazure Marina & Hotel is a supreme destination for travellers and sailors alike.

Lazure Marina

The Marina Lazure in Herceg Novi was opened in June 2019 and has almost 160 berths for yachts up to 20 m in length. The depth in the marina basin is between 2 and 12 meters. All berths have electricity and water. The sanitary facilities are located in the marina tower and are opened via a chip card, which you get when registering at the marina office. A blackwater pump station for the sewage tank is available from 2020. In the

marina, there is a nautical shop and from 2020, some charter companies will offer yachts from the Marina Lazure.

D-Marin Portonovi

D-Marin Portonovi is a full-service 238-berth marina, with capacity for yachts and superyachts of up to 120m. Its sheltered location among the safety of tranquil Boka Bay makes it an ideal base from which to explore the unspoiled Adriatic coastline. Portonovi is considered the gateway to some of the best sailing waters in the Mediterranean. Surrounded by steeply rising mountains, D-Marin Portonovi marina enjoys an impressive setting and also provides opportune access to Montenegro's range of attractions.

Berths come with the highest standards of services and amenities.

Porto Montenegro

The port is well on the way to providing over 650 berths on 20-metre-wide jetties, for yachts ranging from megayachts (150m) to production yachts. Over 130 of these berths will be home to yachts greater than 24-metres in length, the most coveted in Europe. Depths vary from 4.5 to 16 metres. The harbour is very large with a wellprotected entrance and is completely sheltered from wave action by breakwaters. Its position within the Bay of Kotor means that yacht owners can be assured their asset is perfectly protected from the elements, year-round.

Facilities include fuel berths, marina berths, a marina club, megayacht berths, superyacht harbour. Electricity and water to cater for the largest yachts to smaller boats, complete wifi access and all communication needs are on hand.

6.4 Thematic Routes

At this point it is fitting to highlight the Thematic Routes created in the context of the REGLPORIS project as they are designed in such a way to take advantage of the aforementioned facilities. The extensive list and descriptions of the Thematic Routes can be found both on the Project's website (<https://reglports.italy-albania-montenegro.eu/>) and ideally through the dedicated application.

In brief, four (4) Thematic Routes have been identified that have as a common denominator the connection of the marina of the Municipality of Molfetta with those of the neighboring cities but also with the hinterland rich in interesting points of nature, history and local products.

Similarly, four (4) Thematic Routes have been identified and developed towards the south of the Puglia Region, one starting from the port of Brindisi, one from Campomarino, one from Otranto and one from Leuca. A 5th one was established focusing mostly in the hinterlands covering the areas of Martignano, Martano, Calimera and Soleto.

Five (5) Thematic Routes were designed from Termoli harbor toward the center of the Region itself. Through these routes, tourists can see and appreciate lots of the villages of the central Molise such as Montenero di Bisaccia, Portocannone, Ururi, San Martino in Pensilis, Palata, Guglionesi, Larino, Casacalenda, Guardialfiera, Acquaviva, San Felice del Molise, Montefalcone del Sannio, Trivento, Macchia Valfortore, Campomarino, Montemitro.

This proposal was born with a vision of a tourist offer for the area that needs to be adapted to the evolving needs of demand in the creation of integrated tourist itineraries and routes, in order to offer a diversified and at the same time attractive and quality product that enhances the local entrepreneurial and cultural resources

with a view to an endogenous and sustainable tourist development in which the role of the public bodies responsible for planning the area acquires a central role.

The areas of intervention covered by the Study offers a series of attractive factors capable of proposing an articulated tourist offer in line with the consumer's current approach to holidays: no longer an isolated and occasional consumption event as if it were a luxury good, but a more frequent moment in everyone's life, expressing an increasingly felt need, in which different moments of "holiday living" can coexist and integrate.

The presence of natural and cultural assets does not in itself represent a tourism product with economic value, the connection between tourism resources and profitability is given exclusively by the way in which the available resources are transformed.

The process of functional differentiation, which makes it possible to achieve "competitive advantage", corresponds in tourism to the almost unlimited segmentation of the market, the satisfaction of new needs, the personalization of the product through the creation of accessory services, the breadth of the corresponding range of services and the ability to launch new products.

On Albanian grounds three (3) main thematic routes were created which in turn span to other smaller ones. These routes may serve as a tourism complementary product and guidance in relation to NT. The elements selected as part of the routes attractions are defined based on the low level of recognition and the high level of tourist attraction based on the interests of the type of heritage tourist, cultural tourist, adventure tourist, as the most suitable profile suitable for nautical tourist.

Lastly, in Montenegro were integrated three (3) thematic routes as well which cover various aspects of tourism needs. Specifically, there is a Historical one the Fortresses of Herceg Novi, the Along the Coast which as the name suggests is coast and seaside orientated and finally the Among Mountain and Sea which connects the shore to the hinterlands.

7 SWOT ANALYSIS

This chapter summarizes the individual SWOT analysis for the entire intervention area as developed in the context of the REGLPORTS project.

ITALY			
Strengths	Weaknesses	Opportunities	Threats
Types of tourism that can be accommodated	Economic development	Increasing tourist destinations by means of its quality products and services	Environmental Threats lack of awareness, urbanization and overfishing = loss of habitats = loss of species; noise pollution, oil spills, black waters, alien species, forest fires
Two international airports	Unemployment rates	Empowering new forms of tourism (sports, congress, wellness, diving tourism + mixing these forms with nautical tourism)	Uncontrolled development of Nautical Tourism (NT): concessions, occupation of the sea and the coastline
Specific sectors of the economy record positive employment trends in spite of the crisis	Tourism Seasonal fluctuation	Enhance the area, relaunching routes and itineraries with particular attention to local products and complementary sports activities	High real-estate price
Climate characteristics	Environmental pressures in the area of Taranto and Brindisi	Strengthening the enhancement and promotion of the cultural heritage	Risk of identity loss
Important natural environment and quality local resources	Bureaucratic procedures	Enhance ICT providing support to tourists and local operators	Degradation of sea front due to increased development
Historic town centers and attractions with great cultural, religious, architectural quality	The ecotourism offer is still limited and poorly structured	Boatbuilding development: the know-how, tradition and acquisition of new technologies make the local boat builders competitive in the national and international markets	Lack of conservation efforts by tourists or travelers damage the heritage
Access to EU funding sources	Promotion/marketing system	Enhance the area branding	
Excellent road network	Inadequate tourist information and reception system	Exploit emerging markets	

Quality seaside tourism	Lack of analysis of the hotel and non-hotel accommodation sector		
Water quality			
Overall quality of the life			

ALBANIA

Strengths	Weaknesses	Opportunities	Threats
Geographic position	Problems related to environment and pollution in the port areas	Development of coastal planning in national territory and also territorial plans in municipality level	Competition in the area, especially from countries with developed NT (eg. Greece)
Important natural environment and quality local resources	Lack of tourist and marine appropriate infrastructure	Stronger focus in financing in EU level in maritime economy and Maritime tourism	Lack of knowledge and information of tourists for incentives in Albania
Territory appropriate for development of Ports and other marinas	Tourism Seasonal fluctuation	Legal initiatives for 0 tax for Sailing boats and other appropriate vehicles for NT	Centralization of decision making
Important cultural assets	Bureaucratic procedures	Strengthening the enhancement and promotion of the cultural heritage	Environmental Threats lack of awareness, urbanization and overfishing = loss of habitats = loss of species; noise pollution, oil spills, black waters, alien species, forest fires
Climate characteristics			Increased real-estate price

MONTENEGRO

Strengths	Weaknesses	Opportunities	Threats
Natural environment	Capacity of nautical tourism marinas	Demand for nautical tourism	Political instability
Important cultural and historical assets	Tourism Seasonal fluctuation	Access to EU	Environmental Threats lack of awareness, urbanization and overfishing = loss of habitats = loss of species; noise pollution, oil spills, black

			waters, alien species, forest fires
Strength of the hospitality sector	Service quality	Number of closed assets that can easily reopen	Inadequate legislation
Climate characteristics	Inadequate waste disposal and wastewater treatment	Season extension	Competition in the area, especially from countries with developed NT (eg. Greece)
Important natural environment and quality local resources	Bureaucratic procedures	Develop small shipbuilding	Increased real-estate price
Spatial potential			
Preserved maritime world			

Having access to the separate analysis for each country, we can deduct common ground for the entire Intervention Area.

ENTIRE INTERVENTION AREA			
Strengths	Weaknesses	Opportunities	Threats
Natural environment	Tourism Seasonal fluctuation	Demand for nautical tourism	Environmental Threats lack of awareness, urbanization and overfishing = loss of habitats = loss of species; noise pollution, oil spills, black waters, alien species, forest fires
Important cultural and historical assets	Bureaucratic procedures	Accession to EU	Competition in the area, especially from countries with developed NT (eg. Greece)
Climate characteristics		Stronger focus in financing in EU level in maritime economy and Maritime tourism	Increased real-estate price
Important natural environment and quality local resources		Season extension	
		Develop small shipbuilding	

8 STRATEGIC TOURISM PLANNING

Planning deals with organizing the present to accomplish the required future. Tourism planning is concerned with the goal of providing a coordinated transition or linkage between a destination's current situation for a better future for both residents and tourists. As with all economic activities, tourism generates direct and indirect benefits that can be maximized only through proper planning and integration. On the other hand, however, there are also socio-cultural benefits that derive from tourism, so proper planning not only optimizes the benefits, but also mitigates the negative impacts that tourism might cause.

Sound tourism planning also necessitates the development or upgrading of infrastructure such as roads, water, communication etc. which are shared by both tourists and local people. As a result of tourism planning and development, local people are further motivated to make improvements to their properties for use by tourists, thereby benefiting from the increased value.

The number of people traveling has grown enormously in the last few decades, as evidenced from the analysis of the UNWTO and Wttc data. Tourism has progressively transformed itself from an elitist phenomenon into a form of widespread and mass action (70s / 80s), involving ever wider and more differentiated sections of the world population. The quantitative increase in the tourist movement was accompanied by the expansion of the variety and variability of consumption behavior. The multiplication of low-cost routes, the self-care and the search for physical and psychological well-being, the wide penetration of smartphones (mobile first) which has amplified the possibility of accessing content (always connected), and the growing importance of web and social networks in guiding choices, are some of the great changes that are revolutionizing the way travel is experienced. Among the other megatrends of world tourism on which it will be appropriate to start a reflection in terms of promotion and development strategy, it is worth mentioning:

1. The increase in short breaks on the short-medium range: tourist flows are growing, but the periods of use are decreasing. A trend that is now generalized: people travel more than in the past, but they do it for shorter periods.
2. The multiplication of motivations to purchase and the diversification of consumption behaviors: an increasingly heterogeneous parterre of actors, both for countries of 3 Unicredit4tourism in collaboration with the Italian Touring Club: Report on tourism 2016. 15 origins and for social categories (elderly people, single women, millennials, medical tourism, etc.) is addressing the tourist offer in an increasingly less homogeneous and increasingly fragmented way.
3. The polarization of spending with trading-down and trading-up effects: in the future the demand for low-cost flights and travels will increase, but at the same time will increase also the demand for high-level accommodation. The number of rich people is increasing in the world, for example it is estimated that the number of Chinese millionaires will rise from 1.2 million to more than 2 million by 2019. For the new rich people in the world, travelling has become the new status symbol.
4. The growing desire for authenticity and uniqueness of the tourist experience: the holiday is no longer conceived and lived as a simple period of rest and relaxation, but as an experience of life and personal enrichment: tourism is increasingly experiential. 5) Greater attention to the environmental component and eco-sustainability of the travel: from this new sensitivity also arises the enhancement of non-traditional tourist destinations (rural tourism, green tourism in parks and nature reserves).
5. The key word for tourism development in the coming years will be "sustainability", for the World Tourism Organization this is a development that minimizes the environmental impact. According to

the study "Walk on the wild side: estimating the global number magnitude of visits to protected areas", published by the team of researchers at Plos Biology, annual visits to protected areas of the planet have been quantified at 8 billion; the 80% of these visits relate to North America and Europe. It is estimated that these visits generate approximately \$ 600 billion in direct spending and \$ 250 billion in consumer surplus each year. The turnover of nature tourism in 2012 in Italy was calculated at € 11.3 billion.

6. Agritourism, an ever-expanding trend: almost 11 million visitors in Italy, of which 57% foreigners, and a growth rate of over 20% in the last five years. To explain the success of the agritourism - over 18,000 accommodations, with an increase in beds of 26% over the medium term - a series of factors must be considered: the desire to get in touch with the rural world, as opposed to the now dominant urban one; the presence of "strong" attractors (from the landscape to the artisan traditions and to the typical agri-food production); a "local" management, which makes the stay less standardized.
7. Bike tourism and adventure tourism are on the rise: according to the findings of the ENIT in 2015, cycle tourism generates an economic impact of 44 billion in Europe, with 2 million trips and 20 million overnight stays. In Italy it has a potential value of 3.2 billion and is growing at a steady pace. An estimate from the Fiab (Italian Federation of Bicycle Friends) calculates that a person who rides a bike for a day and stays overnight is worth 80 euros.
8. The search for new destinations: within the classic destinations (for example, the sea and the mountains), unspoiled and unregulated places are sought. Increased interest in thematic trips and special stays.
9. The new tourist demand from the emerging middle class of the RDEs (Rapidly Developing Economies), that is the rapidly growing economies: China, India, Eastern and Central Europe.
10. Climate change: the overheating of the planet, following the increasing concentration of greenhouse gases in the atmosphere, is also a decisive factor for the travel and vacation sector because it influences the context conditions that can favor or slow down tourism: the drought, increasingly hot summers, mild and dry winters and the recurrence of exceptional phenomena.
11. International terrorism, no longer an isolated and sporadic phenomenon, limited to a "dangerous" area of the world but something extended to all the areas of the globe. If global tourism has not been affected immediately, something will likely change in the medium term: tourism could, for example, further accentuate its short-medium range character. In fact, already today, over 80% of international arrivals are intra-regional, then they concern movements in the same geographical area;
12. The crisis of the BRICs, which are experiencing a general setback with evident consequences also for tourism. In fact, in just a few years, some destinations have established themselves among the main generating countries of outgoing tourism, such as China, which has assumed the world leadership with 165 billion dollars of tourism spending abroad, Russia which is in fifth place with 50 billion, while Brazil is in tenth position (26 billion). India, on the other hand, is still a non-significant reality (25th place with almost 15 billion). The current scenario may change in the light of economic growth forecasts: The World Economic Outlook of the International Monetary Fund of January 2016 highlights the slowdown in China (the projections for 2016 are around + 6%, positive but far from those of previous years), while the forecasts are negative for Russia and Brazil (-1% and -3.5% respectively). The tourist consequences are not lacking: the still provisional UNWTO figures on spending abroad in 2015 already see a 30% drop for Russia and Brazil;

13. The Sharing Economy, which has asserted itself strongly in recent years, has found an excellent field of application in tourism: from Airbnb to Blablacar and others. The sharing economy is born in a difficult economic and employment context and it has been able to give new solutions to travelers, taking advantage of technological evolution.
14. The European population is aging and requires an increasingly targeted, evolved and innovative offer: European senior tourism will strongly increase. Eurostat estimates that in 2060 about 30% of EU residents will be over 65 (to date this segment covers only 18% of the total). Over 65s people love organized trips, culture and good food, they prefer safety, they are ready to leave even in low season and their stay lasts longer on average. Senior tourists are now more dynamic people and enjoy superior financial resources compared to previous generations.

A Focus on new tourism

Enhancing the beauty of a landscape means promoting all over the world itineraries of naturalistic-international significance, marine reserves, protected areas, nature reserves and related activities connected (cycling, trekking, birdwatching, diving, etc.).

For a tourism development based on the union of culture and territory, a subdivision into by-products will be necessary: historical-artistic heritage: creative industry and arts; "small heritage" or rural heritage, villages, small municipalities; immaterial, such as craftsmanship, rites and traditions, local knowledge; heritage of UNESCO sites with a synergistic design with Matera; cultural itineraries of Puglia Basilicata along the Lecce - Taranto - Matera axis, passing through Altamura and Gravina; religious; fortified sites; circuit of geosites and natural parks; Puglia Bridge over the Mediterranean; streets and paths of Puglia; knowledge and flavors (with food and wine tourism); events and club culture.

It will be necessary to create networks and alliances, thanks to a public-private planning and management model. Once the clusters have been defined, also the products will have to be defined, on which to create any product clubs, declined in relation to the various user targets: families, children, the disabled, seniors, young people, students, LGBT, pet-friendly, foreign markets, various needs.

This system will allow the recognition of the offer, through product standards. It will be essential to create thematic tourist itineraries and destinations based on themes that will allow connections between territories.

"In particular, the "sea product" should not be understood as mere seaside tourism, but according to a theming and an evolution that responds to what international demand requires (heliotherapy, sports, recreational and cultural activities, etc.), but also "sea tourism", that is product of enhancement of knowledge and flavors linked to the sea. The sea must become a cultural element, representing a "gate" for the enhancement and knowledge of the territory, including inland. Nautical tourism can be linked to ancient routes of Magna Graecia reused by travelers on the "Grand Tour", encouraging the "slow" fruition system of the territory."

Tourism at the time of Covid

A crucial aspect of the last few years has been the radical shift created by the Covid pandemic in all aspects of life, industry and the economy. At the beginning of 2020, the tourist perspective was excellent. The UNWTO World Tourism Barometer reports that in "2019 international tourist arrivals globally were 1.5 billion or 54 million more than in 2018 (+ 4%). It also estimated that in 2030, international tourist arrivals would amount to 1.9 billion, continuing the steady growth that the tourism industry was experiencing". For 2020, the UNWTO estimated further growth between 3 and 4%. The explosion of Covid-19, starting from January 2020, and its international spread in the following months, has radically altered and changed both the flows and the concept

of international tourism. Considering the fact that travel restrictions around the world have changed existing tourism perspective from 2020 and likely until 2023, UNWTO estimates that international tourist arrivals globally shrank by 72% in the period from January - October 2020 compared to the same period of the previous year. And given the second wave, the losses will likely increase again in the following period.

The consequences of this can be seen in an increase in domestic tourism in 2020, mainly by road, and a tendency to book last minute travels, with a very reduced booking window. International tourism has experienced a drastic downsizing this year, due to limitations, fear of travel, and severely reduced air connectivity. All this has caused a radical change in the behavior of the demand in deciding where and how to spend holidays, but also the way of doing tourism in the destination. However, the new phase of vaccination immunization and the structural resilience of an ever rapidly changing sector outline a scenario in the short-medium term that through the phases of stagnation-oscillation-assimilation-recovery will provide a substantial recovery of the volumes prior to the phenomenon, but with a substantial change in the relationship between in-home tourism and travel to foreign destinations.

8.1 Identification of reference targets

In order to identify the reference targets, the different types of tourism have been aggregated into two sub-categories:

Environmental and sports tourism

Environmental and sports tourism, including nautical tourism, rural tourism and agro-tourism, adventure sports tourism, eco-tourism, school tourism, religious-spiritual tourism, leisure tourism, social tourism. This target, generally, moves in search of outdoor recreation, contact with nature, adventure, relaxation, socialization, rural and sporting activities; it looks for comfort and guarantee of naturalness; it gives importance to protected areas and parks, woods, paths, nature museums, sports facilities, sporting events, festivals and typical and organic products. Among the factors of attractiveness there are functional accommodations (beauty farm, agritourism, camping, small hotels, residences, boarding houses, rooms), typical restaurants, sports facilities (tennis, swimming pool, horseback riding, mini golf, various team and individual sports), theme parks and information services such as guides, excursions, courses and rural activities, bike rental, boats, etc.

Marine	Cultural	Rural	Urban	Environmental
Traditional sea use	Historical and archaeological heritage	Wine and food	Conference	Nature
Sailing	Art	Sport	Business	Adventure
Cruises	Religious	Events, festivals etc.	Shopping	Ecotourism
Fishing tourism		Local crafts	Night life	Wellness
Snorkeling				
Diving, etc.				

Figure 23: Activities per type of tourism

Urban and Cultural tourism

Urban and cultural tourism which also includes minor cultural tourism, youth tourism, congressional and business tourism, health and therapeutic tourism, educational tourism, ethno tourism, religious-spiritual tourism, leisure tourism. This macro-target seeks knowledge, cultural and historical deepening, recreation, discovery, experimentation, relaxation, quality, safety and information; it emphasizes urban parks and green areas, museums and itineraries, cultural and folkloristic events, festivals, fairs and markets. Among the factors of attraction are comfortable and quality accommodation (especially hotels, historic houses, etc.), typical local restaurants with quality assurance, shopping, leisure services such as cinema, theater, dance halls and information services on history, events and excursions

With reference to the tourist offer available in the area, the following tourist destinations can be hypothesized: Cultural, Rural, Urban, Marine, Environmental and the corresponding thematic channels on which elaborate tourism products

All these kinds of tourism must be integrated and / or been complementary to the marine tourism, which constitutes the current strength of the Region.

Referring to the selected target and namely families, young people, schools, couples, groups, seniors, business below is a table indicating the motivation of the destination by type of target.

	Type	Motivation	Families	Youth	Educational institutes	Senior	Organized groups	Business
Marine	Traditional seaside tourism	Relaxation	T	H ⁴		T	T	H
	Sailing, Cruises	Sports, Prestige	T	T		T	T	
	Marine activities (fishing, snorkeling diving etc.)	Fun	T+H	T+H		T	T+H	
Cultural	Historical and archaeological heritage	Thematic routes; education	T+H	H	H	T+H	T+H	
	Art	Events; competition	H	T+H	H	T+H	H	T+H
	Religious	Interaction and socialization; events	H	T+H	H	H	T+H	

⁴ T & H

Tourist activities are those that people spend at least one day overnight in a location other than their usual residence.
Hiking refers to those activities that are completed within the day and do not use the overnight service

Rural	Wine and food	Taste itineraries	T+H	T+H	H	T+H	T+H	
	Sport	Organized activities	T+H	T+H	H	T+H	T+H	
	Events, festivals etc.	Entertainment	T+H	T+H	H	H	T+H	
	Local crafts, traditions	Workshop; visits; purchase	T+H	H	H	H	T+H	
Urban	Conference	Meetings; Business					T+H	T+H
	Business	Meetings					T+H	T+H
	Shopping	Urban walking	T+H	T+H	H	T+H	H	T+H
	Night life	Entertainment	H	H			H	T+H
Environmental	Nature	Nature itinerarie	T+H	T+H	H	T+H	T+H	T+H
	Adventure	Different itineraries: bike, trekking etc.	T+H	T+H	H	T+H	T+H	
	Ecotourism	Workshops and activities	T+H	H	T+H		H	
	Wellness	Relax	T+H	T+H		T+H		

Figure 24: Visiting motivation per target type

8.2 Strategic actions

When planning to develop the tourism sector with a focus on Nautical Tourism, the discussion about best practices and measures that should be undertaken in the related policies and plans, is of special importance. Exactly these measures will serve to the related authorities to be careful and to take into account the environmental impacts of NT development. The measures to be taken and the recommendations will certainly consider the listing of impacts from the environmental analysis and also the SWOT analysis above. It will be based on the elements and activities on which the Tourism industry is based and specifically the operators offering the NT and Nautical tourists forms.

8.3 Italy

The 2015-2025 regional strategy is focused on the Region of Puglia, it can however be applied and provide a great insight as a strategy tool both for the Region of Molise seeing how the two neighboring Regions have similar characteristics and are directly affected by each other. The 2014/2020 programming allocated approximately sixty million euros to Puglian tourism, adopting an integrated governance capable of enhancing the opportunities and advantages of sectoral intersections and creating products / services aimed at enriching, diversifying and qualifying the tourist and cultural offer of the territorial areas. It has flanked and integrated within the Europe 2020 program the "Smart Puglia 2020" strategy, "Puglia Digital Agenda 2020" which traces the path of innovation and development that has to be followed to strengthen the regional digital system, to outline the prospective vision of current phase of regional planning, that proposes an ever closer integration of "transversal" policies for innovation, competitiveness, internationalization, with the "vertical" policies of the environment, transport, welfare and health, cultural heritage.

1. In the first place, through the research, a clear and incontrovertible fact emerged: "deseasonalization equals internationalization" (that is lengthening the classic Puglian tourist season). Therefore, the Puglian strategy must have this aim because the data show that Italian tourists are still concentrated in the months of July-August, while foreign tourists are those who naturally destagionalise our market.
2. This first observation is also followed by another one linked to the target of foreign tourists and their origin, and it emerged that the European market remains by far the most productive for our operators. The target of the so-called "gray panthers" stands out in this: people over 55/60 who live in countries that have a good welfare system, who have already visited Italy and who are preparing for group holidays in Puglia attracted by wellness and food-nature combination.
3. Key element of the strategy is linked to brand identity and more generally to the prospect of marketing and promotion of Puglia in the near future. Starting from the assumption that 65% of visitors choose their destination independently of traditional intermediaries (tour operators, travel agencies), it is clear that a "generalist" promotion must be pursued while trying to be consistent with the targets to be reached, the places reached from direct flights: a promotion therefore consistent with these areas.
4. A further important strategic element has been that one related to the relationship between product and promotion. The shared orientation appears to be to go towards "product clubs" to be structured through homogeneous clusters (for example art and culture, active tourism, etc.) within which an adequate number of product clubs of regional rank has to be defined. These specific products (for example bike tourism) will require ad hoc promotion with specialized fairs and defined promo-marketing.
5. Between product, promotion and strategy, also emerged the need to define Puglia through its territories without forgetting its specificities, connected to the brand. Salento, for example, in Italy is equal to the Puglia brand, sometimes overlapping it.
6. The theme of promo-marketing is a fundamental and strategic element. The strategy of Puglia aims at producing an advancement of the functions of the portal to favor promo-marketing without necessarily reaching "direct" sales. The orientation is to tie mature product clubs to an online promo-marketing system.
7. Still on the subject of the online, digital is decisive for a tourism enhancement strategy, which emerges as decisive in the light of the new category of prosumers (tourist consumers who become producers

- of information and "involuntary" promotion). In this sense, engagement appears to be a strategy to be pursued even in the long term.
8. A strategy that looks to the future cannot ignore the theme of innovation and technological innovation in the strict sense. This area will have to work a lot on the topic of big data and on consumer profiling. Furthermore, the need for tourist apps and cards that provide the traveler with information and suggestions both in the cultural and public transport fields emerges as transversal.
 9. In a shared vision, the strategy that looks to 2025 cannot ignore the air connections that have been decisive in recent years to increase tourism in Puglia starting from the "putting on the map" that low-cost flights (confirmed until 2019) have represented, and that will reasonably continue following the pandemic crisis. In this context has emerged the need to coordinate promotion and destinations reached by direct flights, while trying to overturn the logic: not only to promote where the Puglia Airports have direct connections, but to ask AdP to directly connect the target markets that emerged from the research and from the demand of the operators.
 10. Still in the infrastructural field, the dimension linked to the bike tourism, the slow mobility and the new emergence of "paths" as a tourist product has emerged as strategic. European, national and regional investments are planned on this: Puglia is also the leading region in two projects of "paths" and aims to encourage urban policies towards a progressive pedestrianization of historic centers. Furthermore, it appears necessary to enhance the internal railways as experiential information points.
 11. The strategy also involves overcoming the weaknesses that have emerged in particular in the field of the widespread hospitality. The shared perception is that Puglia is today a cool destination that has eroded market slices to competitive regions in the 80s and 90s such as Tuscany, Sardinia and Sicily; it has established itself with respect to North Africa (also for reasons of international contingency); it has a very dynamic private system and excellent promotion, but lags behind in the area of territorial policies dedicated to hospitality. For this reason, it will be necessary to network the new local INFO POINTS, to promote a digital market place, as well as to provide the sector with trained workers who speaks foreign languages.

Besides the ability to communicate in foreign languages, training emerges as a strategic theme in all sectors. To be divided into four macro-areas: the world of university training, professional training, e-learning and training with regional leadership, and the business world. A particular focus is training in the cultural field, in the food and wine heritage and typical Puglian specialties.

8.4 Albania

At the same time Albania is one of the Mediterranean countries, which together with other countries are trying to create a profile for the development of the NT, due to the sustainable resources of the coastal area, not only in terms of water resources, but also in terms of resources directly or indirectly related to the coastal area, such as culture, heritage, nature and environment.

Based on these important resources, the Albanian government has recently focused on promoting NT development by drafting the appropriate legal framework and promoting tourists and maritime tourism activities. But this development faces challenges such as the reduction of some of the problems observed in the development of NT in other countries: seasonality and problems with sustainable development, especially in terms of infrastructure developments. So, the development of clear objectives related to NT is necessary and they are oriented in this study in **4 main aspects:**

- Increasing general level of development of the space and increasing the standard of living of the inhabitants, increasing employment and quality of living
- Developing the harmony of the space and traffic corridors in the important coastal and sea routes
- Spatial, economic and infrastructural solutions and protecting of sea and coastal goods in accordance with the development and preservation of the quality of neighboring areas.
- define the development priorities in which protection of sea environment will have the primary importance, and the expansion of nautical tourism ports will be complying to the main ecologic criteria.

The development of NT has to be planned, but the development policy depends on the stability of the system, or the development level of a particular country. The developed countries mostly have established system in which NT has its development policy in compliance with the general policy of economic development. Problems are present in less developed counties or transition countries where there is focus on economic growth and lack of awareness and attention about environment problems, which have their impact on people's welfare. Development presumes integral managing, especially costal and sea area. The growth is only one component of development and one of its promoters, while development is a process of changes in all spheres of life.

There are four main factors that are impacting the development of nautical tourism in ports according to their business model, including sustainable development function

1. **investments in human resources** permanent professional  training (lifelong education of personnel);
2. the achievement of the **quality standard**;
3. **the assessment of the location and the building level achieved**;
4. **Technical and technological conditions for sustainable development.**

The development of tourism in general and its various forms as in this case the development of NT requires some vanguard actions as well as cross-border type projects or projects and initiatives where different countries interact to benefit from the common experience. This helps to promote the resources to build a product that suits the needs of international tourists, to compete in a market with clear standards and requirements, as well as considerable competition.

This study first of all presented a variety of resources where the further development of NT along the Albanian coast could be supported, as well as ways to select and promote some important elements from the point of view of alternative sustainable forms of tourism such as cultural, heritage, adventurous and natural tourism. This new product in interaction with the existing tourist product, but especially being developed in a sustainable way meets the requirements of a tourist profile, not only with the desire to explore the sea, but also the local culture and tradition associated with the sea, make them stay more along the coast and thus have an unforgettable experience.

There are missing studies on nautical tourist profile/segments in the national and international markets. If this study has to count on other studies on different forms of tourist profiles, this is to understand that what other combinations can be done to achieve objectives of sustainability and seasonality reduction as well as raising the economic benefits of NT. In the light of combining NT with other forms, a list of different forms of tourism

and tourist profile can help. The tourist industry offers a wider range of holidays than ever before, and is continually seeking out newly- emerging or potential niche consumer groups, such as:

- Cultural tourism and heritage tourism – in combination with NT, this type of tourist wants to travel by sea and explore the coast with the mentioned forms of NT, but also wants to explore the Cultural and heritage part of the places. It can be
- Sustainable tourism – the tourist profile here should be seen in the light of the one who might use light infrastructures with care about the environment and also who sees the NT activity as one helping the communities, with the desire to explore and buy local products, cuisine and gastronomy, handicrafts etc.
- Rural tourism (gaining a lot of ground in recent years), can be developed in Villages of Albanian Coast, and other similar countries with villages along the coast, to attract the kind of tourist who wants to explore
- Adventure tourism. In the area and the proposed itineraries, types of tourist's profiles want to explore other adventurous activities in the coastal area that together with NT can bring tourist satisfaction. Such activities can be cycling, climbing, skydiving, etc.
- Health or relaxation tourism – this type of tourist wants to experience good health and structures of relaxation, but may be not very much related with NT.
- Gastronomic tourism – tourist who wants to enjoy local food and cuisine
- Sports tourism - related directly to nautical sports.

To this list, many alternatives could be added, which have arisen as a consequence of the drive towards diversification and whose objective is to attract tourism to specific destinations via a variety of methods.

The same thing happens with campaigns to promote tourism. Digital marketing and, above all, social networks are important channels in tourism marketing.

Cruise tourism is a form of NT that is more developed and there are studies that have explored the tourist profile as higher yield tourists, spending, on average, much higher amounts per day than other categories of international tourists. Diversifying the offer towards older and younger generations is important.

Older generations with a higher purchasing power and availability outside the main season may be kept in NT activities until a higher age if the offer is better adapted to their particular needs. This may be achieved by a combination of infrastructure and service improvements such as

- i.) Boats designed for easy circulation between roof, cockpit and interior,
- ii.) Mooring platforms adapted for easy access to yachts and mooring assistance services offered by marinas for leaving and entering the berth
- iii.) And adapted socio-cultural service offer in marinas and their hinterlands.
- iv.) The offer for younger generations may further include:
 1. Easy rental of NT equipment,
 2. Activities for children, nautical schools and organized competitions

3. Innovative ways to use marina space outside main seasons. In general, a diversified offer linking marinas and their hinterlands should seek to develop activities that benefit and integrate both the local population and tourists.

Diversifying the offer may be facilitated by including marinas and any SMEs as profit centers into local, regional, national and cross-border development plans. These actors may use appropriate ICT facilities to advertise and sell their diversified/combined offer.

8.5 Montenegro

In regards to Montenegro, the last tourism strategy in force of the country is referred to the period until 2020. The strategy aims at positioning Montenegro as a high-quality destination and defines measures such as upgrading accommodation infrastructure, raising service quality, diversifying the offer through nautical tourism, mountain tourism, golf tourism, congress tourism, agri-tourism, wellness tourism, camping, cultural/religious tourism, and national parks, and linking tourism with other industries.

The Tourism Development Strategy of Montenegro 2020 has identified six tourism clusters that differ in the characteristics of regions and cultures, and are planned with the aim of forming areas of greater scope, quality and diversity instead of uniformity and municipal closedness.

Herceg Novi belongs to cluster No.3: The Bay of Boka Kotorska.

Cluster No.3. The Bay of Boka Kotorska - unique in the Mediterranean, is the most suitable for the development of high quality and diversified tourism offer. Development is turning to selective forms of tourism: beach tourism, cultural tourism, nautical tourism, sports tourism and health tourism. In this offer, nautical tourism stands out as one of the most prestigious selective type, with the aim of making cluster No.3: The Bay of Boka Kotorska an exceptionally high-quality destination throughout the year.

With the further development of tourism and hotel management in the municipality of Herceg Novi and the implementation of selected strategies and the realization of the competitive advantage of Herceg Novi's tourist product, it is possible to achieve priority aspects of the development of selective tourism.

As one of the types of selective tourism, nautical tourism in the municipality of Herceg Novi is based on the offer of marinas, nautical tourism ports and commercial berths at locations: Škver (City port), Meljine, Zelenika and Porto Novi, which is permanently strengthened by developing new accommodation facilities in hotels of high categories (five and four stars).

The development of additional facilities in nautical tourism ports would enrich the tourist offer and achieve the development of selective tourism.

The Government has been engaged in building a strategic framework for tourism, having identified its potential and importance for the social and economic development of the country. Hereby a table reporting some of the latest strategies in force.

2008	<i>TOURISM DEVELOPMENT STRATEGY UNTIL 2020</i>	<i>Elaborated by the Ministry of Tourism and environment aims at positioning Montenegro as a high-quality destination and defines measures such as upgrading accommodation infrastructure, raising service quality, diversifying the offer through nautical tourism, mountain tourism, golf tourism, congress tourism, agri-tourism, wellness tourism, camping,</i>
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		<i>cultural/religious tourism, and national parks, and linking tourism with other industries</i>
2015	<i>National Strategy for Integrated Coastal Zone Management</i>	<i>National Strategy for Integrated Coastal Zone Management has defined a strategic framework for sustainable development of country coast. Elaborated by the Ministry of Sustainable Development and Tourism in cooperation with the Mediterranean Action Plan (MAP) of the United Nations Environment. Describes a process for the management of the coast using an integrated approach, regarding all aspects of the coastal zone, including geographical and political boundaries, in an attempt to achieve sustainability.</i>
2018	<i>The Law on Tourism and Hospitality</i>	<i>This Law regulates the conditions for the performance of tourism and hospitality activities and other matters of importance for tourism and hospitality. Stipulates that beneficiaries of incentive measures may be companies, other legal entities, entrepreneurs and natural persons performing catering activities, related to tourism and catering”.</i>
2020	<i>Strategy for the development of the maritime industry for the period 2020–2030</i>	<i>The main aim of the Strategy is to define the directions of the maritime economy in Montenegro and adequately valorize the potentials of the sectors through the prism of the BE activities. It covers almost all economic activities related to the sea and its strategic goals are related to increasing the contribution and growth of the economy, strengthening the capacity of the maritime administration, greater involvement of the civil sector, and the inclusion of the professionals as a precondition for a prosperous maritime economy</i>

The development strategy of Herceg Novi until 2020 defines further development of tourism through priority 2.1 where it is stated:

“Tourism will continue to be the carrier of the development of the municipality, but work will also be done on the introduction of those types of tourism that were not sufficiently represented in the offer, such as congress tourism, religious tourism, fair tourism and etc. Development must be divided into two phases: the adaptation phase and the dynamic development phase.”

The adjustment phase will be a period of continuing the necessary confrontation with the real situation and preparation for dynamic development. This phase was also recognized during the analysis of tourism development for the needs of making of Spatial Urban Plan of Herceg Novi with an emphasis on:

- Significant improvement of private accommodation capacities and its partial reduction due to the transition to new types of accommodation (smaller hotels, boarding houses, diffuse hotels, etc.);
- Development of Herceg Novi as the leading Adriatic health destination especially for selected segments of the health product and tourism of the third age;
- Development of cultural tourism through the development of additional cultural offer and events;

- Construction of infrastructure for MICE and nautical tourism, as well as activation of tourist mountain potential.

For all the above-mentioned new tourist products and services, it is necessary to perform strict standardization, in order to create the expected competitive advantage. Standardization of products and services is one of the offer strategies. It represents a trend that is applied everywhere in the world at different levels of services and prices. The emphasis on quality and security is the result of competition around the world in the fight for the customers with high consumer buying power, and represents a prerequisite for creating a brand.

9 IMPACTS

The creation of Tourism Development Plan would be lacking if the potential impacts of tourism development would be accounted for. Human activities determine dramatic changes in natural systems, especially in marine coastal areas. This is true when economic development is fast and scarcely, without offering the necessary infrastructure. It represents a serious threat to biodiversity and the quality of marine water. Territorial protection and especially natural resources and national waters, is presented as a necessity in developing the coastline.

Tourism and nautical tourism represent a very important economic resource for coastal towns. Nevertheless, many of them, in order to increase their economic and financial level, have adopted massive interventions to encourage this growth. This over development can lead to environmental degradation and generally generate negative impacts on the surrounding ecosystem that can lead, as time goes by, to irreversible conditions.

As a result, examples are often found of regions that have fallen victim to a casual and poorly planned tourist development without giving due consideration to the negative environmental, socio-cultural and economic impacts on the community. In fact, the planning and development of tourism inevitably leads to impacts, both positive and negative.

Economic Aspects

Proper planning and subsequent management of tourism development leads to a number of economic benefits including direct and indirect employment opportunities, tax revenues, economic spillovers that other economic sectors usually have.

But on the other hand, tourism development can cause other economic problems such as losses, inflation and sacrifices that are made when developing tourism. In the territories with less economic development, it is possible to detect commodity price inflation, i.e., the increase in prices of tourist products/services by the locals due to the perception that tourists are wealthy and therefore can afford such an increase. However, this trend soon spreads throughout the entire economy, leading to higher prices for locals as well.

Losses in tourism can result from the import of goods and services or labor for tourism purposes. As a result, any income from tourism is used for their payments which results in income being taken out of the local economy.

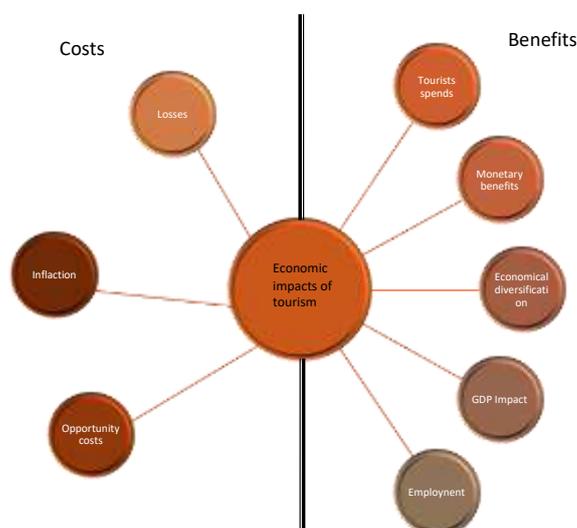


Figure 25: Tourism financial impact (1)

The Cost-benefits analysis of the economic impacts of the tourism in the coastal and inland area can be summarized as follows

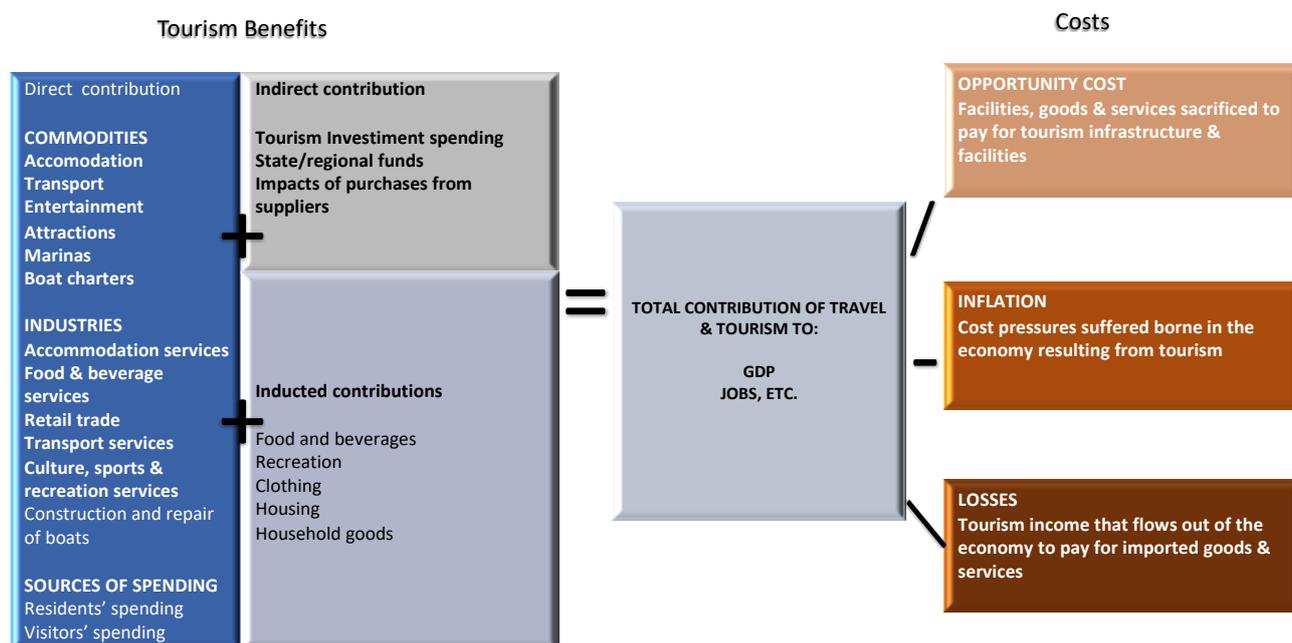


Figure 26: Tourism financial impact (2)

Impacts in relation to the building of tourism facilities

The construction of tourism facilities of various kinds increases the pressures on natural resources and landscapes. Direct impacts on natural resources can be caused for example, by the use of land to provide housing and other infrastructure, the use of resources stone quarries, wood as construction materials etc. In coastal areas it is possible to observe the phenomenon of filling for the creation of land for the construction of tourist facilities and infrastructure but also that of mega buildings, often illegal, as hotel complexes. Because of these human interventions, large-scale beach dune and coastlines erosion occurred. Another generator of negative impacts, however, can also be the no planned construction of marinas and touristic port in general, as their breakwater can cause changes in sea currents.

Excessive uncontrolled construction of the coastline and coastal area (ports, marinas) may generate negative impacts associated with the attractiveness of the nautical tourism offer (overcrowding, lack of moorings, cost.), which in the long term may lead to a loss of interest and a decline of the overall economic value of this sector.

All these interventions generate impacts both from the ecological and economic point of view of long term difficult to remedy.

Recreational impacts

Recreational impacts may be associated with intensive tourism development in urban and/or rural areas. Noise from motor boats and jet skis, automobiles, and buses are some of the problems raised by these. However, these developments also impact dune soils by altering them, contribute to the loss of natural vegetation, disturb sensitive wildlife, and require extra demand of water resources.

Natural resource exhaustion and pollution

Tourism Pressure Causes Resource Depletion. Coastal regions are primary tourism destinations, sensitive marine and coastal environments and coastal communities suffer dramatically under these pressures. Uncontrolled and unplanned tourism development stresses natural resources especially in those areas with fragile ecosystems. Tourism has an impact on the quality of the environment - treatment and disposal of solid and/or liquid waste, particularly during peak tourist seasons, may be inadequate or, in the worst case, non-existent, increased water consumption etc.

Water resources

Water, and especially fresh water, is one of the most critical natural resources. The tourism industry requires an excessive amount of water for its needs. This can lead to water shortages and dwindling water reserves, as well as generating an increased volume of wastewater. In regions such as Puglia, which are characterised by a hot climate, there is an excessive increase in water demand during the peak tourist season, which can reach 400/500 litres per day. Moreover, if the water comes from wells, excessive pumping can cause saline intrusion into the groundwater, a phenomenon that is well present in the coastal areas of the region.

Other Resources

Tourism can create great pressure on resources such as energy, food and other raw materials that may become lacking. The increased demand for them and their transport aggravates the physical impacts associated with their exploitation. Due to the seasonal nature of the industry, many destinations have ten times more inhabitants in the high season than in the low season. These resources are in high demand to meet the high expectations of tourists (heating, hot water, etc.).

Pollution generated by tourism activities

Tourism can cause the same forms of pollution as any other industry: air emissions, noise, solid waste and rubbish, waste water discharges, oil and chemicals, even architectural/visual pollution.

Air pollution and noise

Air, road and rail transport is also increasing due to the growing number of tourists and their increased mobility. Emissions from transport and emissions from energy production and use are linked to acid rain, global warming and photochemical pollution. Air pollution from transport has global impacts, including carbon dioxide (CO₂) emissions from energy use for transport and can contribute to severe local air pollution.

Solid waste and littering

In areas with high concentrations of tourist activities and attractive natural attractions, improper disposal can be a major disruptor of the natural environment - rivers, landscape roadsides but also historical/archaeological areas. Solid waste and littering can degrade the physical appearance of water and shoreline and cause the death of marine species.

Wastewater and groundwater pollution

The construction of tourist facilities often leads to an increase in wastewater pollution. Wastewater pollutes the seas, lakes and rivers in the area, damaging flora and fauna. Wastewater runoff causes serious damage to underwater ecosystems because it stimulates algae growth, hindering the ability of marine flora to survive.

Another phenomenon that can be observed in the study area, is the salinization of water aquifers and the loss of wetlands. Salinization is directly linked to the increase in population and the over-exploitation of wells,

which causes an intrusion of saline water, as the amount of water needed to supply the population is often insufficient.

Impacts on marine environment quality

Excessive development of nautical tourism also brings other disadvantages that directly affect the quality of the environment. They may be due to:

- Development of marinas in inadequate places
- Uncontrolled increase in the number of anchorages in bays of natural interest, which, together with visitors from the mainland, leads to increased pollution of the area.
- At the high season's peak, many seaside cities are invaded by anchored and moored boats, leading to enormous crowding which can significantly compromise the safety of navigation and mooring, the safety of boats and their crew members.

Impacts on biodiversity

Attracting landscape sites, such as sandy beaches, lakes and riverbanks, are often transitional areas, characterised by species-rich ecosystems. Typical physical impacts include the degradation of such ecosystems. An ecosystem is a geographical area that includes all living organisms (people, plants, animals and microorganisms), their physical surroundings (such as soil, water and air) and the natural cycles that sustain them. The ecosystems most threatened by degradation are ecologically fragile areas such as wetlands and seabeds. One example is the effect of anchoring boats in Posidonia seagrass beds, where the survival of algae is threatened. One of the most striking effects on marine fauna is caused by the increase in recreational fishing, particularly underwater fishing.

Development of tourism industry, when not planned properly regarding environmental impact, often results in pollution because of lack of proper infrastructure, polluted water plants and urban wastes, air pollution because of transportation etc.

When discussing about NT as part of Marine tourism, all activities included in this type of tourism, in company level and individual tourist level should be taken in consideration to evaluate environmental impact. It also should be underlined that there is a lack of studies for measuring Environmental footprint of NT. But, identification of Tourism activities and NT vehicles that impact the environment and different impacts in cases of NT development will serve as a baseline for further measurements in the future.

Recreational Marine Vehicles

Recreational marine vehicles, can, therefore, affect air quality during transit to a destination and while their owners' boat in and around that destination. Recreational marine vehicles do not emit as much carbon monoxide as automobiles, but they do emit significantly more of it than recreational land vehicles (such as off-road vehicles) and aircraft.

Direct Impacts of the Cruise Industry

The cruise industry is the fastest growing segment of the tourism industry, but especially part of Maritime tourism and Nautical Tourism.

The majority of coastal regions in visited by cruise ships now provide the function to 'touch down' for a brief or single-day or half-day visit. Consequently, over a short time span a large number of tourists can create concentrated negative impacts on local economies and societies breaching the carrying capacity of the host

environment and thus threatening natural and cultural heritage. In most cases impacts on the host environment cannot be adequately absorbed, due to a lack of infrastructure designed to process pollution of such magnitude and intensity especially with the growth in capacities of cruise because of benefits in lowering costs from volume production/service.

The European cruise market is one of the largest cruise markets in the world, ranking only behind North America for passenger numbers. Over seven million cruise passengers from Europe were carried on cruises worldwide in 2018. Europe is also a leading cruise market destination. The Mediterranean, together with other Northern European routes, held an almost equal market share to the Caribbean in terms of cruise industry deployment in 2019. There are 7.17 million cruise passengers from Europe in 2019.

Solid Waste

As with recreational boats, the amount of solid waste (excluding sewage) generated by the cruise industry is difficult to document. Various types of waste are dumped at sea creating problems such as eutrophication, hypoxia and bio-accumulation of toxins. In low water exchange environment such as the Adriatic Sea as part of the Mediterranean, a persistent waste which slowly decomposes is an increasing problem. Storing waste on-board cruisers on the other hand is a significant problem, because space is at a premium. New ships have applied board waste incineration systems, as a solution in regions where port facilities lack appropriate disposal mechanisms. The cruise industry is attempting to move towards zero discharge of these materials. Total waste on cruise vessels has been reduced by almost 50% over the past 10 years

Air Pollution

The cruise industry has the potential to affect air quality through engine emissions. Most marine fuels are residual fuels with higher concentrations of contaminants such as sulfur. Recent studies have suggested that ocean-going vessels have the potential to affect air quality in coastal regions, port areas, and heavily traveled trade routes where annual sulfur emissions from ships equal or exceed land-based emission. If the ship is on the open sea, maneuvering, or at berth, the gases emitted will vary, but they always consist of NO_x, SO_x, CO_x, O₃ and suspended particles.

Oil and Chemical Effluent

Cruise ships also produce toxic chemicals and hazardous waste from dry-cleaning procedures, used batteries, and paint waste from brush cleaning. Waste oil is produced from normal leakage from the main engines and generators, the cleaning of fuel filters, losses during maintenance, and leaks from hydraulic systems Nutrients introduced into the marine environment through wastewaters can cause alterations in the structure of ecosystems and reduce oxygen levels.

Positive Impacts of the Cruise Industry

It is important to comment on some of the positive impacts of the cruise industry. The industry contributes to the economy of destination areas, since their passengers and crew spend time and money on different shores and destinations.

In addition, the exposure of tourists to beautiful, pristine areas such as those in Mediterranean can improve understanding of the need for conservation. To that end, some cruise lines have programs to foster environmental awareness, that focus on ecology, nature, indigenous culture, and environmental responsibility.

The cruise industry can aid in raising awareness of threatened or endangered species and also donate money raised through shipboard sales of selected items and other shipboard events to the foundations or communities, for environmental problems.

10 GOALS OF TOURISM DEVELOPMENT PLANNING

This Chapter identifies and highlights the objectives to achieve in order to support tourism development in the entire Intervention Area. As stated in the methodology section, the objectives framework is crucial in that it creates specific and tangible goals to aim towards.

Expansion and consolidation of the tourist offer

While the area of interest offers a great variety of tourism activities and can thus accommodate different types of tourism (cultural, leisure, etc.) there is still room for improvement and consolidation and connection between these activities. For example, while there are excellent opportunities to enhance sport tourism in the area, the subsector is not well marketed. This could be a focal point of improvement without the need of extensive resources and similar to the scope of the REGLPORTS project can provide opportunities to connect subsector of the tourism industry.

Improving and adapting the tourism offer by differentiating it according to different expectations

More specifically the already established tourism attractions and activities could tailor their services in order to provide "personalized" packages based on criteria such as visiting time, course intensity (for hiking activities for example, etc.).

Enhance community awareness

Given the underdevelopment of the nautical tourism destination it is important to enhance awareness about the potential of developing the tourism sector as well as its potential benefits. It is therefore critical that this message is promoted within the community and the community members are able to recognize the opportunities available to them in the tourism sector and to identify ways in which they can become involved.

The promotional campaign should be designed to highlight the current impacts of tourism in the territory and shine a spotlight on the individuals who are helping to develop the sector. While the core message of the campaign will be focused on the real opportunities that tourism can offer to the residents, the campaign should also seek to inspire pride in tangible and intangible assets that define the true sense of place.

Improve the image of the area

It is crucial to maintain a high level on the image of the promoted area, specifically shaped towards the targeted tourism.

Seasonal adjustment

The tourism sector, both at national and international level, is extremely dynamic and competitive thanks to the globalization of markets and, consequently, to the presence of new players who take over and expand the tourist offerings of the destination. Therefore, it is necessary to create a tourist product that includes all the characteristics that the region offers (Nature, Culture, Sport, Flavors and Taste) to be used for the specific and often diversified demands of tourists from different parts of the world and can be proposed in all seasons.

Therefore, it is possible to consider other types of tourism aside from nautical tourism which could allow for an "amplification" and "lengthening" of the tourist season in Puglia. In the short term, it would be possible to focus on those elements that are already present but need further development in terms of information and marketing, sharing of objectives among operators, and a systemic relationship with public governance such as food and wine tourism, religious tourism, cultural tourism and green tourism.

Increase the share of foreign tourism

There is significant room to turn outwards and market the area more towards visitors from foreign countries.

Involve as many stakeholders as possible

Creating a network of facilities, services and activities even not directly related to tourism has proven to be beneficial for the quality of services provided overall, thus enhancing the sector in total.

Facilitate an integrated tourism

Linking inland activities and nautical tourism (cultural assets, local history and folklore, food and wine products but also buying our artistic handicrafts and participations to the events).

Increase the level of technological and organizational innovation

It is crucial in this day and age to facilitate visitors as much as possible through the technologies such as smartphone apps, maps, online booking, etc.

Improve the accessibility of the tourist offer

Internationally, the accessible tourism market has been identified as a growing segment that could lead the way for social inclusiveness, as well as providing the industry with financial gains and destination competitiveness. Despite the increased number of people who travel with access requirements, the sector still lacks an understanding of the expectations and experiences of access tourists. In the Puglia Region for example there is low accessibility to cultural heritage and natural parks with presence of architectural barriers that limit access and use of tourist goods and services.

The accessible tourism covers an array of impairments from people who are immobile, visually impaired, an invisible impairment, parents with pushchairs, and seniors. There is the need to achieve dignity in service offerings to gain experiences that facilitate independence and equity of access, access to information before the travel that is clear and accurate to aid planning, and accessible transport and education.

Adopt the principle of sustainability of the tourist offer

Prioritize tourism sustainability (in resources, manpower, energy) to ensure long term viability.

Create a destination brand REGLPORTS

The creation of a unified Touristic Brand is important in providing a holistic approach to visitors and extend an image of connected tourism that can accommodate a variety of visitors.

Increase port capacity

Increasing and improving port reception by increasing the number of berths and the level of services can attract further tourism which will then be reflected in inland activities as well.

Contribution to the economic development of the sector

Through the integrated promotion of resources and the strengthening of the diversified offer on national and international markets.

Promotion of tourist destinations by implemented communication actions such as:

- Fairs, workshops, events, targeted events
- Educational and press tours
- Communication campaigns

- Marketing projects.

Facilitate an integrated fruition of the tourism and nautical tourism linked with (cultural assets, local history and folklore, food and wine products but also buying our artistic handicrafts and participations to the events)

The nautical tourism can be further expanded enhanced other activities offered as part of tour packages include windsurfing, sailing, live aboard yachting and sport-fishing.

On the terrestrial side additional services that can be developed and offered as part of tour packages include birding, wildlife, night walks, hiking, camping etc. Also, there is the opportunity to develop agri-tourism attractions and experiences in the destination. The Region offers a large number of farms and farmhouses with numerous large-scale agriculture activities that include oil, wine, livestock farms, production and processing. Tourist excursion products can easily be designed around these agriculture activities.

Strengthen local capacity to provide tourism services

Having a well-trained workforce is critical to the development of a high-quality tourist destination product Training of front-line personnel—those individuals that spend the most time with visitors such as front-desk personnel, waiting for staff in restaurants and tour guides—is vital to delivering a memorable experience. While there are some persons who are already working in the tourism sector, according to business operators, many do not always come with the requisite skills and understanding of the tourism sector. Many end up providing on-the-job training for those persons they hire. Additionally, there is a need for expanded services, especially in tour guiding. There are now several specialties that can be pursued which would make the tour guide more effective in delivering different types of experiences.

Providing training in hospitality and tour guiding services

There needs to be an immediate expansion of the training provided in hospitality services management. This is an area in order to develop high quality and memorable service to visitors who come to the destination. This training can be done at the local educational institutions. The tourist guides must be trained in various sectors of tourism from nautical to more niche such as birding, archaeology etc. in the aim of satisfy the tourist demand. Moreover, it is recommended that the training activity be carried out in the territory of interest in order for residents to take advantage of the training opportunity provided.

Clear Information about the tourist venue

It is necessary to provide transparent information about the tourist venue. The tourist with special needs have the necessity to identify how accessible the accommodation, transport, and activities are at the venue and if it would be suitable for their needs. Therefore, the availability of clear information that is communicated via a variety of channels and especially online information is an essential information resource for the access consumer. These types of communications can provide accurate information for a person with access needs to make informed decisions about what to expect at their travel destinations and to ensure they experience a pleasurable trip.

Education and training that creates awareness and opportunities for providers to meet people with different access needs is essential.

Create a destination brand REGLPORTS

The implementation of REGLPORTS Area Brand will contribute to convey and transmit to potential and real users the characteristics of the territory and its products in order to increase the reputation of the destination.

It will encompass a set of marketing and communication methods that will help distinguish REGLPORTS' touristic product (destinations, routes, activities, etc.).

Involve as many stakeholders as possible

Through networking activities among the stakeholder, which include the exchange of expertise, knowledge and best practices, information and awareness activities, business consulting etc., aiming to establish synergies and strengthen cooperation between authorities and organizations of nautical tourism and support the tourist economic activity in the intervention area, with respect to the nautical/coastal environment.

11 SUGGESTED OBJECTIVES

Considering at this point the entire Intervention Area (i.e. Italy, Albania and Montenegro) the Nautical Tourism development in the area should follow an integral approach in managing all its activities in the line to sustainable development.

The vision should be to develop NT considering sustainable development as crucial prerequisite for managing coastal economic and ecological system, with necessary ecologically acceptable infrastructure, encouraging direct users (tourists, businesses and community) of coastal resources in their sustainable development orientation and preventing possible deviations.

The mission is to bring economic development through encouraging those investments and NT Activities that will attract tourists and fulfill their needs through the SD model for bettering lives of the communities now and in the future.

Strategic goals for Nautical Tourism development will follow four areas:

- Development of human resources necessary for NT, through permanent professional training, lifelong education of personnel), in all the value chain following the supply for NT development. It is also important to develop awareness and to focus the development on education of managerial personnel in order to preserve natural resources for future generations.
- Establishing economic and demographic balance of growth and development not only in coastal and sea area, but also inland around the coastal area, through developing quality standards for NT and other related businesses and activities of the value chain, tourism businesses as well as other businesses non directly related to tourism.
- Developing systems for development of tourism destinations and tourism products in order to achieve reduction of seasonality as a main aim in NT areas.
- Developing and establishing the system of management of the space and natural resources, according to the principles of sustainable development
- Protection of sea and coastal environment on the principles of accepting capacity of the environment, integrated approach of protection and development, and preventing pollution of the environment
- Technological and ecological aspect of protection of sea environment will be based on clear legislation and measures contributes to efficient management of coastal and sea resources.
- Improve marketing and accessibility.

More specific objectives include:

- Increasing general level of development of the space and increasing the standard of living of the inhabitants, increasing employment and quality of living
- Developing the harmony of the space and traffic corridors in the important coastal and sea routes
- Spatial, economic and infrastructural solutions and protecting of sea and coastal goods in accordance with the development and preservation of the quality of neighboring areas.
- Therefore, it is necessary to define the development priorities in which protection of sea environment will have the primary importance, and the expansion of nautical tourism ports will be in compliance to the main ecologic criteria.

- The action plan follows three important lines regarding important levels of implementation in national, regional and local territory.
- In order to define the best implementation strategy an action plan needs to be defined. It follows three important lines regarding important levels of implementation in national, regional and local territory.

In relation to business operators the action plan should have in focus:

- Tour operators and tourism agencies, agents, in their process of developing services and new products related to NT, but also aiming at reduction of seasonality.
- The development of friendly business environment, infrastructure, financing, legal support, etc.
- The proper incentives for developing new production and service industries to deliver in the value chain.

In relation to territorial planning, which is the line of implementation from the viewpoint of local and central government the action plan focuses in:

- Achieving a better quality of life in the coastal cities and in the villages around them and for a sustainable tourism development, some services should be provided in these centers to ensure their importance as public and private places in particular for services.
- Tourist sites such as marinas, resorts, sports and cultural activities should encourage the creation of synergy effect in tourist centers to increase the sustainability of these centers.
- The preservation of the natural values of public beaches as well as green spaces should be guaranteed, starting from mountainous areas to coastal areas.
- Municipalities should take into account the requirements for these services to ensure a high quality of urban style and structure of local and tourist residential areas.

The professional management of territorial development in the Albanian development plan is realized through the inclusion of new residential areas in the existing areas, to avoid the expansion of scattered and detached settlements, and by protecting the free space by defining a network of open spaces. In this way, on the one hand, urban sprawl in vacant spaces is interrupted, and on the other hand, the necessary space is given to economic development.

- In relation to environment and sustainability, the action plan should focus in implementation for the benefits of communities and society.
- It should be prohibited to anchor boats, yachts and other vessels in areas that have been specially designated as such on-sea maps and other publications of appropriate institutions, particularly in environmentally protected areas.
- Proper anchoring is vital to the safety of all stakeholders in a port (anchorage place) as well as to the safety of the seafloor.

The development must not be sporadic as it has been so far, but it is necessary to plan localities systematically, to qualify managers for running business, to draw public attention to balanced development of NT.

As port policy is being brought into line with transport policy, not only generally, but also specifically related to sustainable development requirements and EU requirements in different economic and legal aspects in the process of integration of Albania in EU, ports are faced with a more challenging policy framework. The search for sustainable transport has faced government with a broader based approach, with a lot more considerations in place than simply market and economic development. Developers of major projects in ports and marinas of

course must develop firstly the environmental assessment analyses and prove the feasibility on the environmental aspect of every project.

Communication between responsible authorities

Lack of careful, integrated, and well-coordinated management by the local and central authorities that operate in the field should be taken in serious consideration for being solved through proper planning processes in NT destinations and areas. Integrated management of environment and coastal territories in general, requires particular measures that start from drafting management plans on marine and land protected areas, and continue in promoting and massively educating the local population on such areas in order to protect the irreplaceable values of our valuable ecosystem. The stable economic development cannot be achieved without marine economy being developed, where it is included not only the development of infrastructures, but also fishing and aquaculture. Formalizing the activities of this sector and monitoring the economic activity that is developed in the shores and its resources, are two primary steps that need to be undertaken from the central and local authorities. Currently ports, as aforementioned in other sections of the analysis, do not work on their full potential. So careful planning and implementation of plans according environmental impact analyses require collaboration and communication among Port authorities, local and central government, other stakeholders such as tourism associations and tourism Destination Management Organizations.

Measures to be taken against climate changes

Central and local government have to take into consideration the necessary measures to adapt and mitigate the risk of climate changes through initiatives such as: reforestation, planting trees in endangered areas, building dams to prevent floods but also by limiting urban expansion, using ecological materials, utilizing renewable energy, etc.

12 SUGGESTED ACTIONS

This chapter provides insight, based on previously analyzed data of the entire Intervention Area, i.e. the regions of Puglia and Molise on the Italian area, Albania and Montenegro.

Having established an extensive picture of the current status this Chapter highlights suggested actions to be taken in order to create a shift towards the objectives described in the previous Chapter.

12.1 Infrastructure Development

With the exception of the Puglia Region, the rest of the intervention area is found to be lacking in regards to Nautical support infrastructure. It is important to accent that when speaking about Nautical support infrastructure we do not solely refer to ports and marinas but rather to the full spanning mechanism that supports maritime travel (fuel access, road networks, hospitality, etc.). Therefore, it would be imperative to invest on such infrastructure (potentially through EU funding) and consequently raise employment, visitability etc.

12.2 Identification of new and specific "tourism products"

The area of intervention is very well known for their produce, relatively untouched by the industry agricultural growth, vineyards and more. All of the above can act as a great "package" to attract alternative tourism in part arriving in boats and yatches.

12.3 Specialised Training

One of the issues highlighted was that of the lack of specially trained personnel. Therefore, the countries of interest should prioritize the specialized training on hospitality, guides, agents, boat and yacht drivers and more. The creation of informative seminars on specific topics to raise awareness of the various actors: quality, culture of hospitality, territorial marketing, potential of local cultural heritage can be also a getaway for people considering touristic activities.

12.4 Marketing and Dissemination

All of the above can be in vain if not marketed properly in order to reach as many prospective customers/tourists. Such activities can range from Brand creation, joint promotion for existing or new platforms (e.g. booking, TripAdvisor, etc.), the promotion of typical products of each area and more. Further marketing activities will be focused on creating a marketing mix consisting of four elements: nautical-tourism product design, pricing, distribution and promotion. The optimal combination of elements of the marketing mix will formulate the future marketing strategy for the development of nautical tourism.

The application of marketing strategy in nautical tourism is a necessary precondition for the development and inclusion of nautical tourism in global nautical-tourist flows.

12.5 Creation of calendars of events

The three areas, supported by the REGLPORTS network can create a series of events for which the whole cluster strives to support and disseminate, irrespective of its location.

12.6 Sustainability

A huge detriment historically of tourism development is the degradation of the local environment and the social aspects of local life. Therefore, tourism development should be planned and controlled accordingly from regional authorities and comply with existing sustainability directives.

12.7 Networking Enhancement

In the context of marketing, it is crucial to expand the network of participants by creating partnerships, joints activities, increase awareness of local communities in the three countries and more.

12.8 Focusing on increasing “season”

The extension of the touristic season should be a priority for all three countries, while always keeping sustainability requirements active.

13 CONCLUSION

As presented in detailed in the previous Chapters, the entire Intervention Area, Italy (Puglia and Molise Regions, Albania and Montenegro) despite their differences, present also very clear similarities. That is why the REGLPORTS project and its outputs present a perfect opportunity to support development. As presented earlier, communication is key as all three countries face similar issues such maintaining social and environmental sustainability, enhancing the connection between maritime tourism and hinterland visits, improve employment metrics etc. (presented in great detail previously).

The document highlighted the weaknesses but also the strengths that the territories can offer by developing an integrated and diversified product where various aspects of the "holiday" can be combined, within a framework where sea, culture, folklore, faith, food and wine act as a connecting link in defining a quality tourist circuit.

It is to be hoped, that the Partners and more the entities they represent will be able to implement the strategic plan developed in the context of REGLPORTS. The planning provided here can be an excellent starting point so as to strengthen the tourism sector and in particular that of nautical tourism in order to contribute to local development. not only from the economic point of view, but also in terms of territorial identity.

Therefore, it is crucial that the Project's outputs are put in use and maintained in the foreseeable future as ways to facilitate transition. The REGLPORTS Network can provide the main establishment through which future activities are being managed and incentivized. The Training tools and material, produced by the REGLPORTS project, can be a great free resource of tailored knowledge for all three countries. The Thematic Routes can provide an excellent stepping stone on the generation of more such "paths" and the marketing of them on international media. The dedicated SWOT Analysis for each of the countries (Italy, Albania, Montenegro) can provide great insight on the actual strengths, weaknesses, opportunities and threats and support informed decision making.

All of the above, have to be taken into consideration and hopefully implemented with the outmost importance placed on sustainability. Environmental and social sustainability can be very easily disrupted by tourism development through increased contamination of the environment, housing prices increase and more potential issues highlighted earlier. In this regard, cooperation can be crucial. An already established cooperation between the three countries can be the basis for further consultation among them, sharing know-how and expertise and avoid issues that have been encountered elsewhere.

Finally, this study should not be a static product, rather one that is constantly revisited in order to either gain perspective, compare development, track changes and provide a basis for future development plans.

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