

**Blue  
Tourism  
Initiative**

# **Sustainable Blue Tourism in the Mediterranean: Trends, Challenges, and Policy Pathways**



## Sustainable Blue Tourism in the Mediterranean: Trends, Challenges, and Policy Pathways

This report was prepared by the IUCN Centre for Mediterranean Cooperation (IUCN Med), with the support of the Andalusian Institute for Research and Innovation in Tourism (IATUR) through the University of Málaga, and in collaboration with project partners from the Blue Tourism Initiative, IDDRI and eco-union.

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The IUCN Centre for Mediterranean Cooperation works to bridge gaps between science, policy, management and action in order to conserve nature and accelerate the transition towards sustainable development in the Mediterranean.



The Andalusian Institute for Research and Innovation in Tourism (IATUR) is an initiative led by the Universities of Granada, Málaga, and Seville. IATUR is focused on conducting new, high-quality research at both international and national levels, in collaboration and cooperation with the Andalusian productive sector. The University of Málaga hosts the headquarters of IATUR for the development of this work. The University of Málaga (UMA), established in 1972, is a leading public university in southern Spain, known for its academic excellence and home to numerous specialised research centres.



IDDRI is an independent think tank based in Paris (France) operating at the interface of research and decision-making that investigates sustainable development issues that require global coordination.



eco-union

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FONDS FRANÇAIS POUR  
L'ENVIRONNEMENT MONDIAL



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# About the Blue Tourism Initiative

The [Blue Tourism Initiative](#) is a global multi-stakeholder innovation program focused on the environmental management, governance, and planning of coastal and maritime tourism in three marine regions: the Mediterranean, the Western Indian Ocean, and the Caribbean. The project supports the participatory development of sustainable blue tourism initiatives through policy actions and a multi-stakeholder approach in order to inform the scalability of sustainable blue tourism initiatives in other regions.

The objectives of the Blue Tourism Initiative are to:

- assess the current global and regional state of blue tourism, focusing on challenges and opportunities, and recommend approaches for sustainable blue tourism development;
- support and monitor the implementation of sustainable blue tourism initiatives in the Mediterranean, Western Indian Ocean, and the Caribbean;
- integrate sustainable blue tourism management and governance at regional policy level, share best practices, and raise awareness among key local, national, and regional stakeholders.

The Blue Tourism Initiative is implemented by the Institute for Sustainable Development and International Relations ([IDDRI](#)) and think-and-do tank [Eco-Union](#) (lead partners); the International Union for Conservation of Nature – Centre for Mediterranean Cooperation ([IUCN Med](#)) in the Mediterranean; Coastal Oceans Research and Development in the Indian Ocean ([CORDIO East Africa](#)) in the Western Indian Ocean, and the Caribbean Natural Resources Institute ([CANARI](#)) in the Caribbean. The initiative is co-funded by the French Global Environmental Facility ([FFEM](#)).



## LIST OF ACRONYMS

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**ACCOBAMS:** Agreement on the Conservation of Cetaceans of the Black Sea, Mediterranean Sea and Contiguous Atlantic Area

**AIVP:** Worldwide Network of Port Cities

**BE:** Blue Economy

**BT:** Blue Tourism

**BTI:** Blue Tourism Initiative

**CAGR:** Compound Average Growth Rate

**CBT:** Community-Based Tourism

**CCH:** Critical Cetacean Habitats

**DMOs:** Destination Management and/or Marketing Organisations

**EBSA:** Ecologically and Biologically Significant Marine Area

**ETC:** European Travel Commission

**EU:** European Union

**FAO:** Food and Agriculture Organization of the United Nations

**GDP:** Gross Domestic Product

**GES:** Good Environmental Status

**GFCM:** General Fisheries Commission for the Mediterranean

**GII:** Gender Inequality Index

**GMP:** Gross Marine Product

**GT:** Gross Tonnages

**GVA:** Gross Value Added

**HQWW:** High-Quality Whale Watching

**IGOs:** Intergovernmental Organisations

**ICZM:** Integrated Coastal Zone Management

**IPCC:** Intergovernmental Panel on Climate Change

**ITAs:** International Tourist Arrivals

**IUCN:** International Union for Conservation of Nature

**MPA:** Marine Protected Area

**MSP:** Maritime Spatial Planning

**MAP:** Mediterranean Action Plan

**MSSD:** Mediterranean Strategy for Sustainable Development

**MedPAN:** Mediterranean Protected Areas Network

**Mediterranean RBT:** Resource of the Mediterranean Blue Tourism

**MSSD:** Mediterranean Strategy for Sustainable Development

**MEET:** Mediterranean Experience of Ecotourism

**COP:** Conference of the Parties

**MEA:** Multilateral Environmental Agreement

**NDC:** Nationally Determined Contributions

**NP:** National Park

**NTO:** National Tourism Organisation

**NbS:** Nature-based Solutions

**NbT:** Nature-based Tourism

**NECSTouR:** Network of European Regions for a Competitive and Sustainable Tourism

**NGOs:** Non-governmental organisations

**NW:** North-Western Mediterranean

**OECM:** Other Effective Area-based Conservation Measures

**PSSA:** Particularly Sensitive Sea Area

**PA:** Protected Area

**RPML:** Regional Plan for Marine Litter Management

**SBE:** Sustainable Blue Economy

**SAC:** Special Area of Conservation

**SDG:** Sustainable Development Goal

**SMEs:** Small and Medium-sized Enterprises

**SPAMI:** Specially Protected Area of Mediterranean Importance

**TTDI:** Travel & Tourism Development Index

**UK:** United Kingdom

**UN:** United Nations

**UfM:** Union for the Mediterranean

**UNEP:** United Nations Environment Programme

**UNEP/MAP:** Action Plan of the United Nations Environment Programme

**UMA:** University of Málaga

**WH:** World Heritage Site

**WTTC:** World Travel & Tourism Council

**YTD:** Year to Date



<b>1. Introduction</b>	5
1.1 Definitions	5
1.2 Objectives and Methodology	5
<b>2. State of Blue Tourism in the Mediterranean</b>	6
2.1 Context, Trends and Evolution	6
2.2 Regional Economic Impact	7
2.3 Key Segments of Blue Tourism	8
2.3.1 Beach Hotels and Coastal Resorts	9
2.3.2 Cruise and Yachting Tourism	9
2.3.3 Nautical Tourism	10
2.3.4 Nature-based Tourism and Ecotourism	11
2.3.5 Marine Cultural Tourism	12
2.3.6 Fish Tourism	13
<b>3. Impacts and Vulnerabilities of Blue Tourism in the Mediterranean</b>	14
3.1 Socio-economic Impacts	15
3.2 Environmental Impacts	17
3.2.1. Land Degradation and Habitat Loss	17
3.2.2. Water Scarcity	18
3.2.3. Pollution and Waste Management Gaps	18
3.2.4. Marine Pressures and Biodiversity Decline	20
3.3. Impacts of Multiple Crises	22
3.3.1 COVID-19 and Tourism	22
3.3.2 Geopolitical Instability	23
3.3.3 Climate Change	24
<b>4. Stakeholders and Governance Frameworks</b>	26
4.1 Key Stakeholders	26
4.1.1 Public Authorities and DMOs	26
4.1.2 Academia	27
4.1.3 Intergovernmental Organisations (IGOs)	27
4.1.4 Non-governmental Organisations (NGOs)	27
4.1.5 Sectoral and Technical Institutions	28
4.1.6 Small and Medium Enterprises (SMEs)	28
4.2. Recent Sustainable Blue Tourism Initiatives	28
4.3 Regional and International Governance Frameworks	30
4.3.1 Sustainable Tourism Governance	30
4.3.2 UNEP/MAP and the Barcelona Convention	30
4.4. Blue Tourism and Marine Protected Areas	31
<b>5. Policy Pathways for Resilient Blue Tourism in the Mediterranean—Inroads Toward a Regenerative Blue Economy?</b>	33
Overview of the Policy Pathways	33
1. Climate Change Adaptation and Resilience Building	35
2. Managing Mass Tourism to Relieve Coastal Pressures	37
3. Sustainable Products and Destination Stewardship	38
4. Governance and Strategic Integration	39
5. Research and Innovation	40
6. Knowledge Sharing and Capacity Building	41
7. Sustainable Finance and Investment	42
<b>6. Conclusions</b>	43
<b>Bibliography</b>	44

## List of figures

<b>Figure 1.</b> Mediterranean ITA Trends	7
<b>Figure 2.</b> Contribution of the Blue Economy to the overall EU economy in terms of GVA	8
<b>Figure 3.</b> Contribution of the Blue Economy to the overall EU economy in terms of employment	9
<b>Figure 4.</b> Estimated arrivals at tourist accommodation establishments per km <sup>2</sup> by NUTS3 or equivalent region in 2022	11
<b>Figure 5.</b> MEET Model for ecotourism development	12
<b>Figure 6.</b> Main challenges facing international tourism in 2025	14
<b>Figure 7.</b> Population density by administrative region 2011-2018	15
<b>Figure 8.</b> Percentage of built-up area in the 1km coastal belt by NUTS3 or equivalent region, 2019	16
<b>Figure 9.</b> Ecological vulnerability to tourism by NUTS3 or equivalent region, 2022	18
<b>Figure 10.</b> Water consumption in the nine municipalities of the Balearic Islands during the January-September season in 2019 and 2020	19
<b>Figure 11.</b> Cumulative tourism pressure in Mediterranean Sea waters in 2022 based on maritime traffic	20
<b>Figure 12.</b> Ecological vulnerability to tourism in Mediterranean waters, 2022	21
<b>Figure 13.</b> Share of Mediterranean domestic tourism arrivals as a proportion of total domestic arrivals at destination, 2016–2023 (%)	22
<b>Figure 14.</b> Arrivals, EU-27 tourist accommodation establishments*, monthly, 2019 vs 2023	24
<b>Figure 15.</b> The System of Mediterranean Marine Protected Areas	32

## List of tables

<b>Table 1.</b> Number of tourist establishments in Mediterranean countries	10
<b>Table 2.</b> Main reasons for destination selection among tourists from 27 EU countries, 2021	13
<b>Table 3.</b> Socio-economic impacts of tourism in the Mediterranean region	17
<b>Table 4.</b> Domestic tourism arrivals*, Eastern and Southern Mediterranean, 2018-2022	23
<b>Table 5.</b> Mediterranean Sustainable Tourism Initiatives	29

## List of boxes

<b>BOX 1.</b> Mediterranean Experience of Ecotourism (MEET)	12
<b>BOX 2.</b> Managing Posidonia Banquettes for Coastal Resilience: Insights from POSBEMED, POSBEMED2 and POSBEMED+	21
<b>BOX 3.</b> Governance Alignment in Sustainable Tourism: Lessons from the Balearic Islands and Venice	30
<b>BOX 4.</b> Green List: A Global Benchmark for Protected Area Management	32



Charfia fishing in the Kerkennah Islands, Tunisia ©Mubadarat/IUCN



# 1. Introduction

## 1.1 Definitions

The Blue Economy (BE) has been gaining momentum as a key concept in sustainable ocean-based development in recent years.<sup>1</sup> The World Bank defines the BE as the “sustainable use of ocean resources for economic growth, improved livelihoods, and job creation while preserving the health of ocean ecosystems”.<sup>2</sup> It emphasises, therefore, maintaining the long-term health and resilience of ocean and coastal ecosystems while ensuring they continue to deliver essential services.<sup>3</sup>

Similarly, in the Mediterranean context, the Union for the Mediterranean (UfM) refers to sustainable BE as “the set of human activities depending on the sea and/or underpinned by land-sea interactions in the context of sustainable development, and notably including industrial and service sectors such as aquaculture, fisheries, blue biotechnologies, coastal and maritime tourism, shipping, ship-building/repair, ports, ocean energy and marine renewable energy, including offshore wind, which are among the main traditional, and emerging economic maritime sectors in the Mediterranean Sea basin”.<sup>4</sup>

Coastal and maritime tourism, also known as Blue Tourism (BT), accounts for the main share of the BE<sup>5</sup> and represents the most important and fastest-growing economic activity occurring in the sea.<sup>6</sup> Coastal tourism includes beach-based and recreation activities such as swimming, sunbathing, surfing, walking, and wildlife watching, while maritime tourism-involved water-based activities like sailing, yachting, cruising, and other nautical sports.<sup>6</sup>

In the Mediterranean, the four main BT sub-sectors are cruises, nautical activities, sun-and-beach holidays, and cultural breaks, highlighting the sector’s cross-cutting nature and its strategic importance for the regional economies.<sup>7</sup>

## 1.2 Objectives and Methodology

This diagnostic report examines the current state of blue tourism in the Mediterranean region. The diagnosis draws on literature reviews, stakeholder consultations, and the key reference report *Mapping the Impact of Blue Tourism in the Mediterranean: Vulnerability Assessment of Coastal and Marine Destination*.<sup>8</sup> Interviews with regional industry stakeholders—including tour operators, civil society organisations, and representatives from the hospitality and cruise sectors—helped identify key challenges and opportunities. The findings and proposed policy pathways were reviewed by regional experts to strengthen and ensure their relevance, feasibility, and alignment with regional priorities.

The report has two main objectives:

- Assess the **current state of blue tourism in the Mediterranean** by identifying key trends and reviewing relevant policy and governance frameworks. The report highlights challenges—such as fragmented governance, environmental pressures, and unequal benefit distribution—and explores opportunities for a more sustainable, inclusive and resilient model, including innovation, diversification, and Nature-based Solutions.
- Propose **actionable policy pathways** to overcome these challenges and unlock the full potential of sustainable blue tourism. These pathways respond to regional vulnerabilities, such as climate change, biodiversity loss, and increasing water stress, while aligning with global and regional agendas. Globally, they support the 2030 Agenda for Sustainable Development—particularly SDGs 12, 13 and 14—as well as the Paris Agreement and the European Green Deal. Regionally, they aim to strengthen and operationalise key frameworks such as the Mediterranean Strategy for Sustainable Development (MSSD)<sup>9</sup> of the Barcelona Convention and the Union for the Mediterranean Blue Economy Agenda.<sup>10</sup>

## 2. State of Blue Tourism in the Mediterranean

### KEY MESSAGES

- **Growing sector:** In 2024, the Mediterranean region recorded nearly 360 million international tourist arrivals (ITAs) in Southern Mediterranean Europe (91,3%) and North Africa (8,7%) alone. The entire region is expected to reach 635 million ITAs by 2025.
- **Economic importance:** The Blue Economy is a vital economic driver in the Mediterranean. In the EU, it generates €171 billion in gross value added (GVA) and employs 3.6 million people.
- **Dominance of coastal and maritime tourism:** Intense tourism activity in the region and mass tourism continue to shape the regional blue economy landscape, particularly along coastlines.
- **Tourism sub-segments:**
  - **Beach hotels and resorts:** Represent 20% of global hotel accommodation capacity.
  - **Cruise tourism:** Growing numbers of cruise ships and passengers, with high concentration in the North-Western Mediterranean.
  - **Ecotourism:** Supports the conservation of natural areas.
  - **Fisheries tourism:** Encourages community-based tourism by involving local populations in authentic experiences.
- **Rising demand:** There is a marked increase in demand for diverse blue tourism offerings in the region, such as those related to cruise, nautical and nature-based tourism.
- **Environmental sustainability:** All blue economy sectors must reduce their environmental and climate footprint to align with the European Green Deal and Global Multilateral Environmental Agreements such as the Paris Agreement and the Global Biodiversity Framework (GBF).

### 2.1 Context, Trends and Evolution

The Mediterranean region comprises 22 coastal countries<sup>a</sup>—both EU and non-EU—with diverse economic, social, and environmental conditions. The Mediterranean Sea, Europe's largest semi-enclosed sea, covers nearly 2.6 million km<sup>2</sup> and features over 46,000 km of coastline.<sup>9</sup> The Mediterranean Basin is the world's second-largest biodiversity hotspot,<sup>11</sup> due to its exceptional species richness and high endemism,<sup>12</sup> shaped by a unique climate, geological complexity, and centuries of human influence. Situated between Europe, Asia, and Africa, the region has long been a crossroads for facilitating biogeographical exchange. Its landscapes have been shaped over millennia by ancient civilisations interacting with local environmental conditions.<sup>13</sup> Today, these ecosystems face growing pressures from urbanisation, population growth, economic development and climate change-induced impacts such as rising temperatures, prolonged droughts, shifting

rainfall patterns, and increased frequency of extreme weather events.

Approximately one-third of the region's population lives in coastal zones, with over 70% in urban areas—highlighting the importance of urbanisation and economic activity along the coastline.<sup>14</sup> With its mild climate and rich cultural heritage, the Mediterranean is the world's top tourist destination<sup>7</sup>, attracting about 30% of global tourist flows.<sup>6</sup> Coastal and maritime tourism is therefore a key economic sector<sup>4</sup>, representing 13% of exports and 23% of the service sector.<sup>15</sup> International tourist arrivals (ITAs) have steadily increased since the mid-1990s. In 2019, just before the COVID-19 pandemic, the region reached 400 million ITAs, with the expectation to reach 626 million by 2025. The latest data shows that in 2024, Southern Mediterranean Europe and North Africa alone reached 359.7 ITAs.<sup>22</sup>

By 2024, international tourism nearly recovered to pre-pandemic levels, with global arrivals reaching 99% of 2019 figures.<sup>16</sup> In 2024, ITAs reached an estimated 1.4 billion globally, up 11% compared to 2023. This growth was driven by strong post-pandemic demand, particularly in Europe, solid performances across major source markets, and the recovery of Asia-Pacific destinations. Increased air connectivity and visa facilitation also contributed to the rise. Notably, European arrivals exceeded pre-pandemic levels by 1%.<sup>16</sup>

Despite this recovery, the region remains heavily affected by tourist seasonality, with a large influx of visitors concentrated in the summer months<sup>17</sup> and persistent mass tourism based on "sun, sand, and sea" concept<sup>18</sup> that generates major environmental and social impacts.

"During the summer on the Mediterranean coast of Morocco, most of the well-known beaches are very crowded with local tourists because they are accessible by public transport. There are other amazing beaches, but they are not accessible by public transport. During the busy summer season, these well-known beaches are not clean, but winter is a very different experience. With support, it should be possible to move away from the present reliance on local tourism, we know there is the appetite for this, as we have suppliers approach us saying they can give low prices because there is no one travelling out of season," adds a representative from a Moroccan DMC.

These aggregate figures mask a strongly heterogeneous reality. In terms of regional distribution, the Western Mediterranean receives the highest number of ITAs, led by France (102 million in 2024), Spain (94 million), and Italy (58 million).<sup>19</sup> These countries also rank highly in the 2024 Travel & Tourism Development Index (TTDI)<sup>20</sup>, alongside Germany, the UK, and Switzerland.

The North-Eastern countries—Slovenia, Croatia, Bosnia and Herzegovina, Montenegro, Albania, and Greece—also attract a growing number of international arrivals. Since the mid-2000s, South-Eastern Mediterranean countries such as Egypt, Israel, Lebanon, Syria, Türkiye, and Cyprus have also seen a marked increase in tourist arrivals compared to the previous decade, similar to the South-Western nations including Morocco, Algeria, Tunisia, and Libya. Despite this, tourism flows across the Mediterranean remain highly uneven.

The Southern Mediterranean continues to experience significant imbalances in tourism flows and economic benefits. Insecurity and conflicts in countries like Syria and parts

a. These Mediterranean countries include: Albania, Algeria, Bosnia and Herzegovina, Croatia, Cyprus, Egypt, France, Greece, Israel, Italy, Lebanon, Libya, Malta, Monaco, Montenegro, Morocco, Palestine, Slovenia, Spain, Syria, Tunisia and Türkiye.





Charfia fishing in the Kerkennah Islands, Tunisia ©Mubadarat/IUCN

**Figure 1. Mediterranean ITA Trends**



Source: eco-union, 2022

of the Middle East can divert tourists to more stable neighbouring destinations.<sup>7</sup> Nevertheless, several southern Mediterranean nations have seen progress, and governments have encouraged the private sector to develop large tourism projects in coastal destinations. Türkiye, Albania and Egypt improved their TTDI scores between 2019 and 2024—Türkiye moving from 37th to 29th (+3.1%), Albania from 78<sup>th</sup> to 66<sup>th</sup> (+5.9%), and Egypt from 66th to 61st (+4.3%).<sup>20</sup> Still, tourism in these countries remains vulnerable to both external and internal shocks.<sup>21</sup>

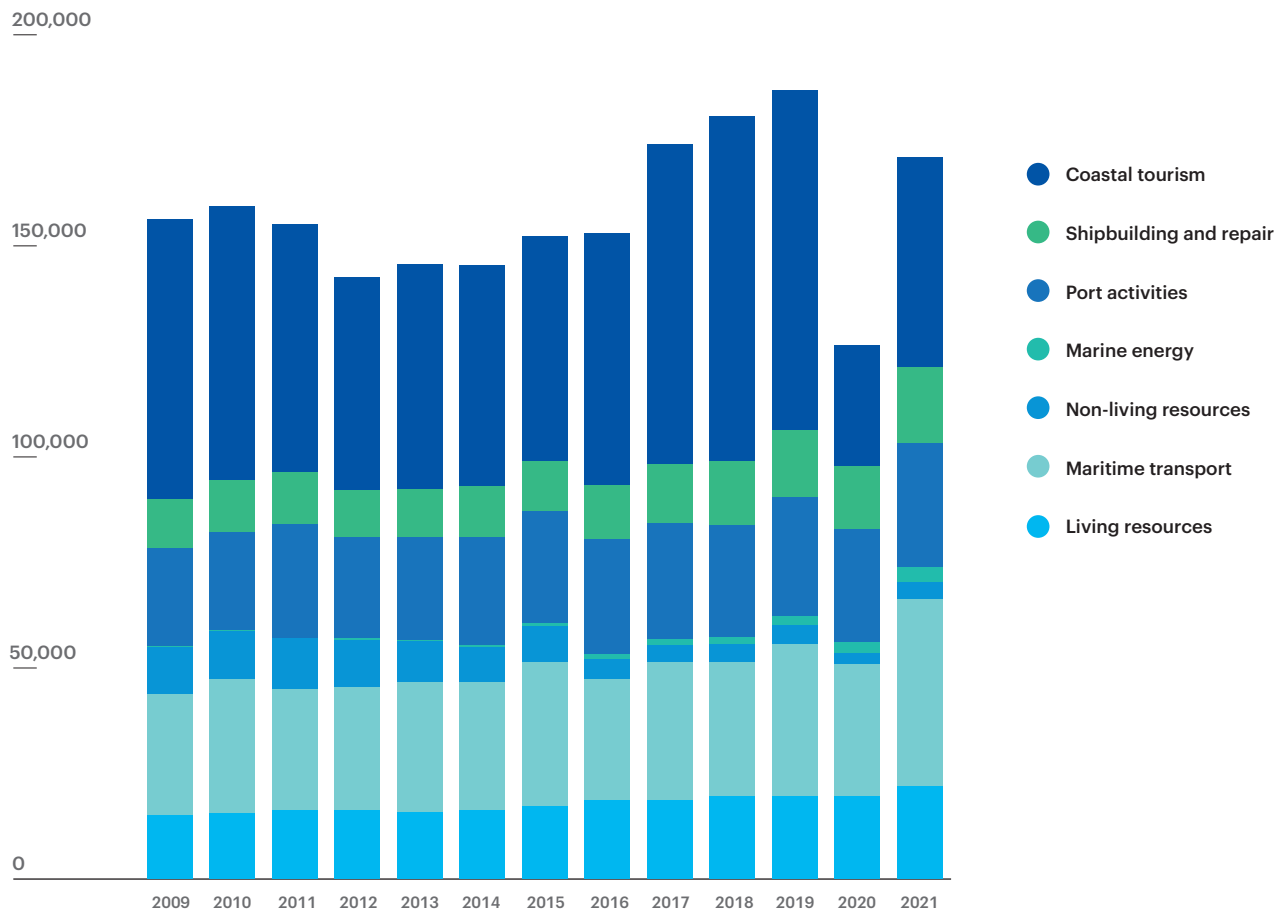
Overall, the North-Western Mediterranean (Spain, France and Italy) alone accounts for 64% of all ITAs, while the South-Eastern region receives only 17%.<sup>7</sup> These disparities are illustrated in **Figure 1**, which highlights recent trends in Mediterranean tourist arrivals.

## 2.2 Regional Economic Impact

The Blue Economy is a major driver of employment, innovation, and investment, creating development opportunities at both national and local levels. Within the EU<sup>22</sup> it contributes €171 billion in Gross Value Added (GVA) annually (**Figure 2**) and supports around 3.6 million jobs, reflecting the significant yearly output of marine and coastal activities such as tourism, fisheries, shipping, and renewable energy (**Figure 3**).

Similarly, in the Mediterranean region, the blue economy plays a crucial role in generating income and supporting jobs, contributing significantly to regional economic growth. Fisheries and aquaculture alone produce over 1.5 million tonnes annually, generating around €18 billion in revenue and supporting more than 700,000 jobs. Tourism—especially coastal and maritime tourism—is a key economic driver<sup>23</sup>, contributing 4.8% to the region's cumulative GDP and supporting millions of jobs—7.8 million directly (4.5% of total employment) and 20 million indirectly (11.5%) in 2015.<sup>24</sup> The

Figure 2. Contribution of the Blue Economy to the overall EU economy in terms of GVA



Source: EU, 2024

entire Mediterranean Blue Economy, including both EU and non-EU countries, has an estimated total value of USD 5.6 trillion<sup>14</sup>, capturing the cumulative worth of its natural capital, infrastructure and ecosystem services.

It plays a significant role in the economies of Southern European countries, contributing a substantial share of national revenue.<sup>25</sup> In 2021, among EU countries, Spain led the BT sector in terms of employment, accounting for 22% of tourism-related jobs, followed by Greece with 19%, France with 13% and Italy with 9%. In terms of gross value added (GVA), Spain again led with 23%, followed by France at 20%, and Italy at 11%.<sup>26</sup>

The Mediterranean's "gross marine product" (GMP)—the total value of ocean-related activities—is estimated at \$450 billion annually. Despite covering just 1% of the world's ocean area, the Mediterranean region accounts for 20% of global GMP, with Italy as the largest contributor, followed by Spain, France, and Türkiye. Approximately 92% of the region's GMP comes from tourism. Coastal tourism contributes \$300 billion annually, and marine tourism adds another \$110 billion. In contrast, fisheries and aquaculture make up only 2% of regional GDP (approximately \$8 billion annually), though their importance varies significantly by country.<sup>27</sup>

The Blue Economy has become central to sustainable ocean-based development. Coastal tourism, in particular,

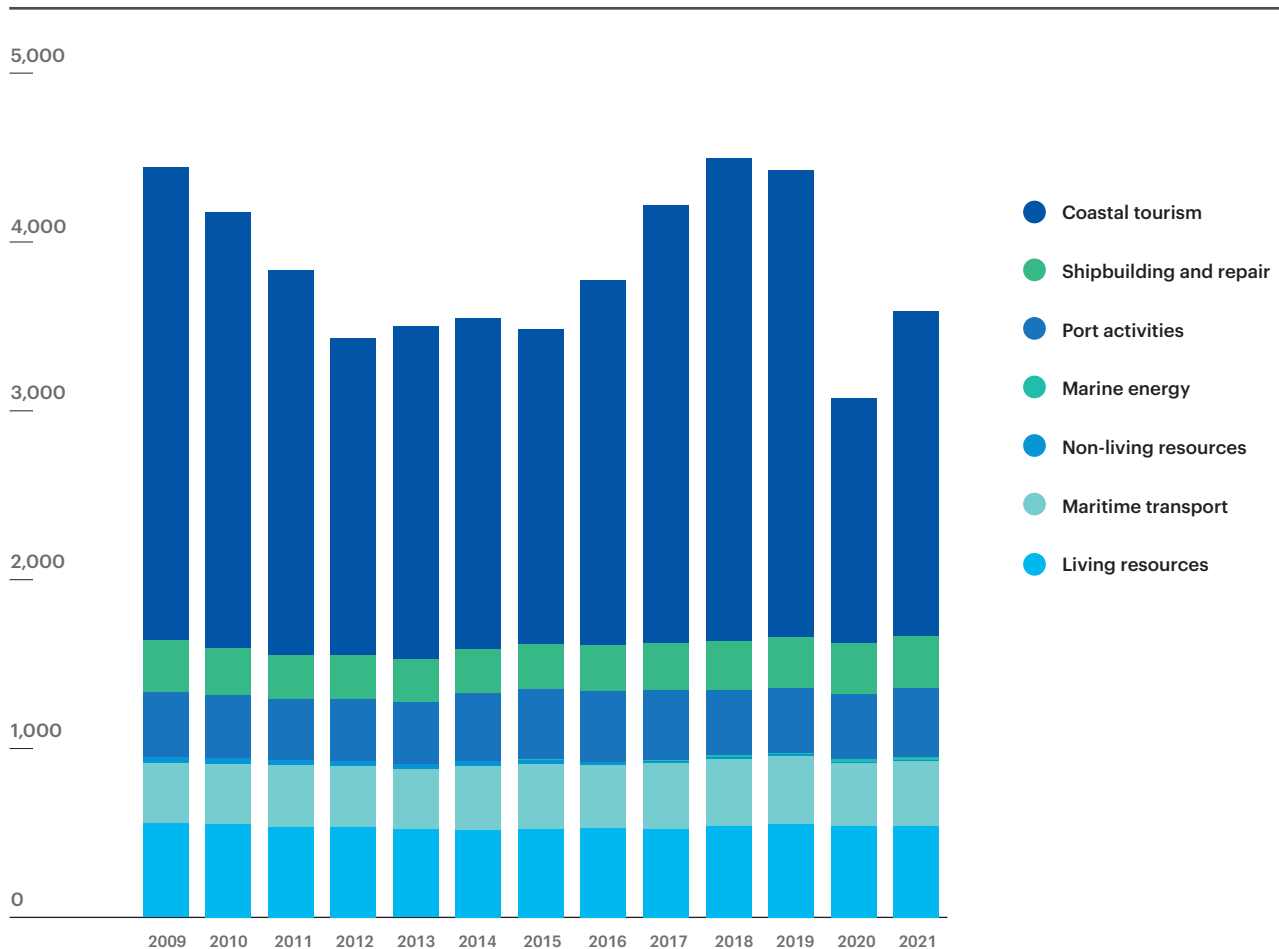
underpins many Mediterranean national development strategies.<sup>7</sup> The 2021 UfM Ministerial Declaration on Sustainable Blue Economy recognised its economic importance while also highlighting its environmental and social impacts. Importantly, the sector is highly vulnerable to climate change, making adaptation strategies crucial for long-term resilience.<sup>23</sup> All blue economy sectors—tourism, fisheries, aquaculture, maritime transport, port activities and shipbuilding—must reduce their environmental and climate footprint to align with the objectives of the European Green Deal<sup>28</sup>, namely achieving climate neutrality, restoring biodiversity, promoting a circular economy, and eliminating pollution. Ensuring the sustainability of these sectors is key to safeguarding marine ecosystems and addressing the region's intertwined climate and biodiversity challenges.

## 2.3 Key Segments of Blue Tourism

Blue Tourism in the Mediterranean includes a wide array of sub-sectors ranging from mass-market segments (beach resorts, cruise tourism, recreational yachting) and mixed segments (nautical tourism) to emerging alternative models (nature-based tourism, marine cultural tourism, pescaturism).



Figure 3. Contribution of the Blue Economy to the overall EU economy in terms of employment



Source: EU, 2024

Besides these core segments, others are gaining importance for Mediterranean destinations. MICE tourism (meetings, incentives, conferences & exhibitions) generally sees flows in spring and autumn, while sports tourism often peak in the non-summer months, and gastronomy and wine tourism links travel to local product cycles and heritage. Combined, these niches help diversify tourism supply, lengthen the season, and alleviate the spatial and temporal concentration of tourism, relieving pressure on ecosystems and supporting local economies.

The case of Malta illustrates this potential: despite having one of the highest tourism intensities, Malta records among the lowest levels of seasonality, according to the European Commission's EU Tourism Dashboard. This shows that with appropriate policies and infrastructure, destinations can succeed in distributing visitor flows more evenly throughout the year. Improved segmentation can help guide more targeted governance, investment, and sustainability interventions.

### 2.3.1 Beach Hotels and Coastal Resorts

Beach and coastal resorts are the backbone of Mediterranean blue tourism and represent one of the most globalised sectors.<sup>6</sup> Their growth has been driven by the expansion of large hotel chains, which serve as major hubs for investment, employment and innovation.<sup>29</sup>

The Mediterranean region accounts for 20% of the world's hotel capacity.<sup>15</sup> According to the EU Blue Economy Observatory, in 2021 the accommodation sub-sector in the coastal EU countries employed nearly 848,000 people (44% of blue tourism jobs), followed by 812,000 in related services (e.g. restaurants), and about 263,000 in transport. This sector also generated €24 billion in GVA—48% of the total—while services contributed €16.7 billion (34%) and transport €9.1 billion (18%).<sup>27</sup> Accommodation availability has risen across most countries (Table 1), alongside price increases of up to 110% in some destinations (notably in Greece and 5-star hotels).<sup>30</sup>

### 2.3.2 Cruise and Yachting Tourism

Cruise tourism is one of the most profitable and fastest-growing segments. Despite past disruptions—including financial crises, geopolitical instability, social crises (e.g. the negative consequences of the Costa Concordia accident in Italy in 2012) and the COVID-19 pandemic—the sector has rebounded strongly, with passenger volumes in 2023 up 23% from 2019.<sup>31</sup>

The Mediterranean hosts 27% of global maritime traffic and 10% of the world's cruise ships. Cruise tourism is the largest sub-sector of the tourism economy in terms of GVA and job creation.<sup>31</sup> In Europe, the cruise industry contributes \$44 billion and supports around 315,000 jobs. Total cruise passenger movements in Mediterranean ports reached 32.9 million, with

the Western Mediterranean dominating (24 million passengers), followed by the eastern Mediterranean (4.6 million) and the Adriatic (4 million).<sup>32</sup> Barcelona, Palma de Mallorca and Civitavecchia are the leading EU cruise ports.<sup>26</sup> This resurgence marks a clear recovery beyond pre-pandemic levels.

Despite national and international efforts to regulate ship emissions and pollution, enforcement remains inconsistent.<sup>33</sup> Meanwhile, ships are increasing in size and could reach 345,000 gross tonnages (GT) by 2050, intensifying environmental concerns.<sup>34</sup>

*"We need to show and prove to the world what we are doing. When you are part of an association, it pushes you to be mindful of the profile of each port, every port is different. But equally, you also need to have the will and commitment to bring the right information to the outside world. Sustainability might be one common challenge, but if we approach sustainability from the port and destination perspective, a one-size-fits-all solution is not workable. Every port has to address its own sustainability challenges in its own way," states a representative from a cruise association.*

Recreational boating is another dynamic segment, encompassing both small recreational boats (<24 m) and large vessels (yachts >24 m and mega-yachts >34 m). The majority of recreational boats in the Mediterranean are less than 24 m in length, but the number of large yachts is increasing, in line

with the global trends. The Mediterranean is a year-round hub for luxury yachting, hosting around 70% of the world's mega-yachts. North-Western Mediterranean coasts have a dense network of marinas, many of which are fully booked during peak seasons. However, both cruising and yachting contribute significantly to air pollution, noise, marine ecosystem disruption, and pressure on coastal communities—particularly in the Western Mediterranean, Alboran Sea, and Northern Adriatic. Cities like Rome, Naples, and Barcelona face the greatest impacts due to concentrated cruise arrivals.

Rising public concern over these environmental impacts has increased pressure to improve health, safety, and sustainability standards in maritime tourism. While these sectors remain vital sources of regional employment and economic dynamism, their long-term viability depends on balancing growth with environmental stewardship and community well-being.

### 2.3.3 Nautical Tourism

Nautical tourism includes a wide range of maritime and coastal sports and recreational activities such as scuba diving, snorkelling, water skiing, windsurfing, sailing, surfing, and many others.<sup>6</sup> These activities rely on specific coastal conditions and continue to grow in popularity, contributing significantly to the local economies of coastal destinations through services like equipment rental, training, accommodation, and transport. The high demand for water sports equipment across the Mediterranean is driven by the region's favourable climate, extensive

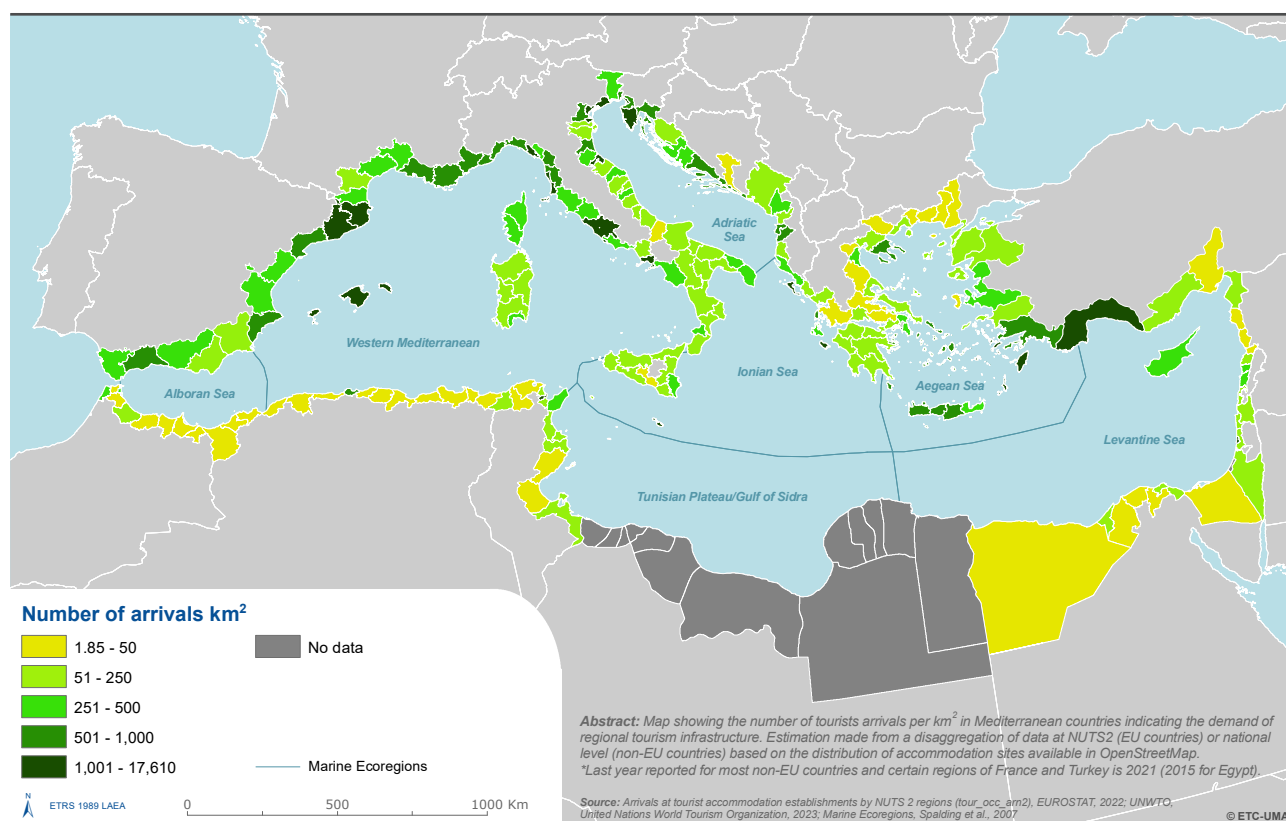
**Table 1. Number of tourist establishments in Mediterranean countries**

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Algeria	Nd	Nd	1,195	1,231	1,289	1,368	1,417	1,449	1,502	Nd
Bosnia and Herzegovina	447	486	530	583	643	668	690	498	583	Nd
Cyprus	790	791	778	780	789	793	813	819	803	Nd
Egypt	1,219	1,261	1,267	1,239	1,244	1,243	1,205	Nd	Nd	Nd
France	17,370	17,358	17,205	17,172	17,840	17,960	17,733	17,416	17,056	Nd
Greece	Nd	Nd	Nd	Nd	21,189	23,209	22,682	11,685	14,360	Nd
Israel	357	366	374	388	407	419	429	426	437	448
Lebanon	549	557	566	575	579	582	584	586	586	Nd
Malta	Nd	Nd	Nd	Nd	Nd	Nd	216	174	213	251
Monaco	Nd	14	14	12	Nd	12	Nd	Nd	Nd	13
Montenegro	333	320	317	348	370	382	406	382	406	438
Morocco	Nd	Nd	Nd	3,690	3,881	4,055	4,229	4,234	4,549	Nd
Spain	19,318	19,207	19,352	19,278	19,459	19,255	19,381	19,544	19,542	Nd
Tunisia	847	848	862	824	848	868	876	875	893	Nd

Source: UNWTO data, unless otherwise specified. Greece: OECD Tourist Trends and Policies; Nd: No data, Israel: Central Statistical Office; Malta: Malta National Statistical Office; Monaco: Principality of Monaco; Montenegro: Statistical Office of Montenegro; Morocco: Ministère du Tourisme, du Transport aérien, de l'Artisanat et de l'économie sociale; Tunisie: Institut National de la Statistique.



Figure 4. Estimated arrivals at tourist accommodation establishments per km<sup>2</sup> by NUTS3 or equivalent region in 2022



Source: Mapping the Impact of Blue Tourism in the Mediterranean: Vulnerability Assessment of Coastal and Marine Ecosystems (IUCN & ETC-UMA, 2024)

and diverse coastline, long tourism season, and growing interest in active and nature-based travel experiences.

Post-pandemic trends show a resurgence in water sports participation. For example, in the UK—a key outbound market to the Mediterranean—participation rose from 62% in 2020 to over 72% in 2022. The Southern European market for water sports equipment is estimated to reach US\$ 1.32bn in 2025, forecasting a compound annual growth rate of 5.34% (CAGR 2025-2029).<sup>35</sup> In Italy, interest in water skiing, paddle boarding, and snorkelling has fuelled market growth, with the water sports equipment sector projected to grow at a CAGR of 2.1% between 2024 and 2028.<sup>36</sup>

Diving is a high-value, sustainable segment of nautical tourism. Divers tend to have higher purchasing power, and they travel regularly<sup>37</sup>, with an estimated 800,000 Europeans travelling to dive each year, spending over €1.4 billion annually. Key markets include the UK, France and Germany. A notable case is the Medes Islands Marine Protected Area in Catalonia, Spain, which attracts 20,000 divers annually—9.3% of the area's visitors—and generates up to 70% of the local GDP of some communities.<sup>21</sup> Local planning tools help manage tourism impacts by regulating recreational, sport, educational, scientific and professional tourism while conserving ecological values.<sup>38</sup>

The development of new technologies and equipment, such as electric boats, is expected to make water sports more accessible and affordable, further boosting their popularity.<sup>6</sup>

### 2.3.4 Nature-based Tourism and Ecotourism

Nature-based tourism (NbT) includes all forms of tourism that use natural resources in an undeveloped way.<sup>39</sup> Both before and after the COVID-19 pandemic, NbT was one of the fastest-growing tourism sectors and plays an important role in sustainable development. The pandemic accelerated the shift towards nature-focused travel, with protected areas like Spain's Natural Parks seeing a significant increase in visitation during the 2020-2021.<sup>7</sup>

NbT supports sustainable development by redirecting tourism flows to less conventional destinations, helping relieve pressure on overcrowded sites. Recent surveys show that 43% of travellers consider the natural environment a key factor in destination choice (Table 2), indicating growing demand for ecotourism and outdoor experiences that promote environmental awareness and conservation.<sup>40</sup>

However, this shift has also led to new challenges of saturation in natural areas, particularly in protected and fragile ecosystems that were not historically equipped to handle high visitor volumes. This has resulted in problems such as trail erosion, wildlife disturbance, waste accumulation, and tension with residents. While NbT can alleviate pressure in urban and coastal mass tourism hotspots, it can also create new hotspots of environmental stress if not properly planned and managed.

According to UN Tourism, ecotourism focuses on nature-based experiences where the primary motivation is the

appreciation of natural environments and traditional cultures in natural areas.<sup>42</sup> Post-pandemic trends in Mediterranean tourism reflect a shift toward nearby destinations, green tourism, low-carbon travel, and efforts to reduce seasonality.<sup>7</sup>

### BOX 1. MEDITERRANEAN EXPERIENCE OF ECOTOURISM (MEET)

One example of recent developments in regional ecotourism is the Mediterranean Experience of Ecotourism (MEET)<sup>44</sup>, created in 2018. Emerging from several Euro-Mediterranean initiatives, and with its secretariat based at the IUCN Centre for Mediterranean Cooperation (IUCN Med), it focuses on embedding sustainability into the core of ecotourism product development in and around Protected Areas (PAs).

At the heart of MEET is a four-step approach designed to ensure that ecotourism itineraries are not only market-ready but also environmentally and socially responsible.<sup>45</sup> A key feature is the assessment of the ecological footprint<sup>46,47</sup> of each itinerary. The methodology also emphasises collaborative planning between PAs and local tourism actors, resulting in park-led, multi-day itineraries that highlight natural and cultural heritage. Through public-private partnerships, the MEET model builds a local value chain that directly benefits communities while reinforcing conservation objectives.

This model has been applied in over 40 Protected Areas across the Mediterranean, offering a replicable framework for ecotourism that balances conservation, community benefit, and visitor experience. (Figure 5)

Leading organisations such as the World Travel & Tourism Council (WTTC), UN Tourism, and the World Sustainable Hospitality Alliance, emphasise the vital role of travel and tourism in protecting and conserving nature. In a joint report, they stress the importance of safeguarding biodiversity<sup>43</sup>—particularly the Posidonia meadows in the Mediterranean—and provide practical guidelines and perspectives. The report also highlights how tourism resilience is closely tied to biodiversity, calling on businesses to become active stewards of nature.

### 2.3.5 Marine Cultural Tourism

Marine cultural tourism refers to tourism activities centred on the tangible and intangible cultural heritage of coastal and maritime communities. It showcases how people have historically interacted with the sea, from seafaring and fishing to crafts, rituals, cuisine, and built heritage, offering immersive experiences that celebrate the identities, traditions, and knowledge systems that have emerged from life by and with the sea.<sup>48</sup> As one of the fastest-growing tourism segments, both before and after COVID-19, it has diversified tourism offerings and strengthened the financial resilience of local marine ecosystem management.<sup>6</sup> By attracting a broader range of visitors year-round, it also supports deseasonalisation and fosters greater community engagement.<sup>49</sup>

Mediterranean coastal and marine areas are rich in cultural heritage shaped by centuries of interaction with the sea. This includes fishing traditions, craftsmanship, and historical landmarks such as ancient settlements, fortresses, harbours, and lighthouses. Cultural tourism allows visitors to explore these

Figure 5. MEET Model for ecotourism development



Table 2. Main reasons for destination selection among tourists from 27 EU countries, 2021

Reason for choice of destination	EU27
Cultural offer of the destination (museums, local events, gastronomy)	44%
Natural environment of the destination	43%
The price of the trip in general	43%
Activities available at the destination	30%
Accessibility of services and activities for all: children, elderly, disabled, etc.	24%
Clear information on health and safety guidelines	20%
Destination (city, region) promotes environmentally friendly practices	15%
The destination can be reached by low-impact transport	14%
Local population involved in tourism activities	13%
Sustainability certification of accommodation and attractions	11%
Other	6%
Don't know/not applicable	3%

Source: EU Eurobarometer, 2021 (multiple answers were possible)<sup>41</sup>

through museums and historical sites, and by participating in traditional ceremonies or festivals and hands-on experiences.

Food is another key cultural asset, as gastronomic tourism in the region has been steadily growing over the last two decades.<sup>50</sup> Mediterranean coastal and marine areas often boast a diverse range of culinary traditions based on local seafood and coastal produce. Cultural tourism provides insights into the connection between food, culture, and the marine environment, and offers the chance to explore and savour these traditional cuisines through food tours, cooking classes, and visits to local markets or restaurants.<sup>6</sup>

### 2.3.6 Fish Tourism

Fish tourism, or *pescaturism*, is an alternative to traditional coastal tourism. It involves artisanal fishers hosting tourists aboard their boats, sharing local fishing traditions through educational and recreational activities. In the Mediterranean, this form of tourism is generally associated with positive effects, as it helps raise awareness of the fishing-related cultural heritage, strengthens local identities, and boosts local economies.<sup>51</sup> It also promotes social inclusion by encouraging female participation and generational renewal in the sector.<sup>52</sup>

Unlike fishing tourism—which targets tourists who actively fish and has rather limited local economic impact—fish tourism appeals to visitors interested in learning about local culture. It provides additional income for artisanal fishers while respecting and preserving the environment.<sup>53</sup>

One of the priorities of the FAO's General Fisheries Commission for the Mediterranean (GFCM) *Strategy 2030 for sustainable fisheries and aquaculture in the Mediterranean and the Black Sea* is to work on implementing the blue transformation in the region in a sustainable, productive, profitable, environmentally friendly and globally competitive way.<sup>54</sup> In line with this and due to climate and biophysical conditions, the development of fish tourism is concentrated in Southern Europe, especially the Mediterranean, and represents as such an opportunity to reduce tourism seasonality in coastal regions.<sup>55</sup>



Artisanal fishing in Tunisia ©Mubadarat/IUCN



### 3. Impacts and Vulnerabilities of Blue Tourism in the Mediterranean

The Mediterranean tourism industry is highly productive, but the cultural and natural resources it depends on are increasingly under threat. Like many marine ecosystems, the Mediterranean has long been treated as an unlimited resource—heavily exploited by tourism, and other industries, and increasingly polluted by waste—while also being impacted by climate change.<sup>24</sup>

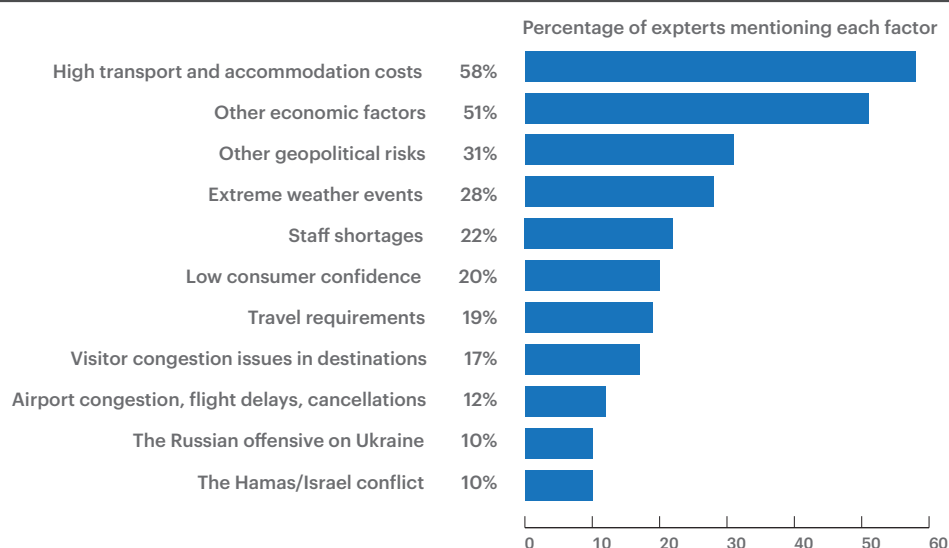
Unchecked growth in tourism and related activities is degrading ecosystems, undermining environmental quality of the area. This calls for urgent action from decision-makers and stakeholders to “green” the blue tourism industry by adopting strategies that balance economic, social, and environmental goals.<sup>56</sup> The pandemic has also increased awareness among tourists of the need for ethical, environmentally and socially responsible choices.

As both a global biodiversity hotspot and a leading tourism destination, the Mediterranean faces a critical paradox: while tourism depends on a clean, healthy environment, it can also pose significant threats to nature. Sustainable tourism is therefore essential to preserve the region’s biodiversity and support the livelihoods and well-being of local communities. Effectively managed, protected and conserved areas are vital tools in this effort. Identifying the most vulnerable zones can help target conservation efforts, support the global goal to effectively protect 30% of coastal and marine areas by 2030, and enhance ocean resilience.<sup>57</sup>

Meanwhile, the broader context in which Mediterranean tourism operates is becoming more volatile and uncertain. Globalisation has shortened distances through advances in transport and communication, connecting destinations that were once difficult to reach. However, the sector is now increasingly exposed to macro-level risks such as high inflation, volatile oil prices, and heightened geopolitical tensions. In addition, extreme weather events<sup>58</sup> linked to climate change are undermining consumer confidence and operational reliability. These interlinked pressures are shaping the future of international tourism in 2025 (Figure 6)<sup>16</sup>, and are amplifying existing vulnerabilities in coastal and marine areas across the region. The high dependency of many destinations on a limited number of markets makes them particularly vulnerable to fluctuations in demand. The case of Cyprus is illustrative: according to the European Commission Tourism Dashboard, in 2023, around 55% of all overnight stays came from only three source markets. This highlights how reliance on a narrow circle of visitors can amplify the impact of geopolitical tensions, economic recessions, and travel restrictions.

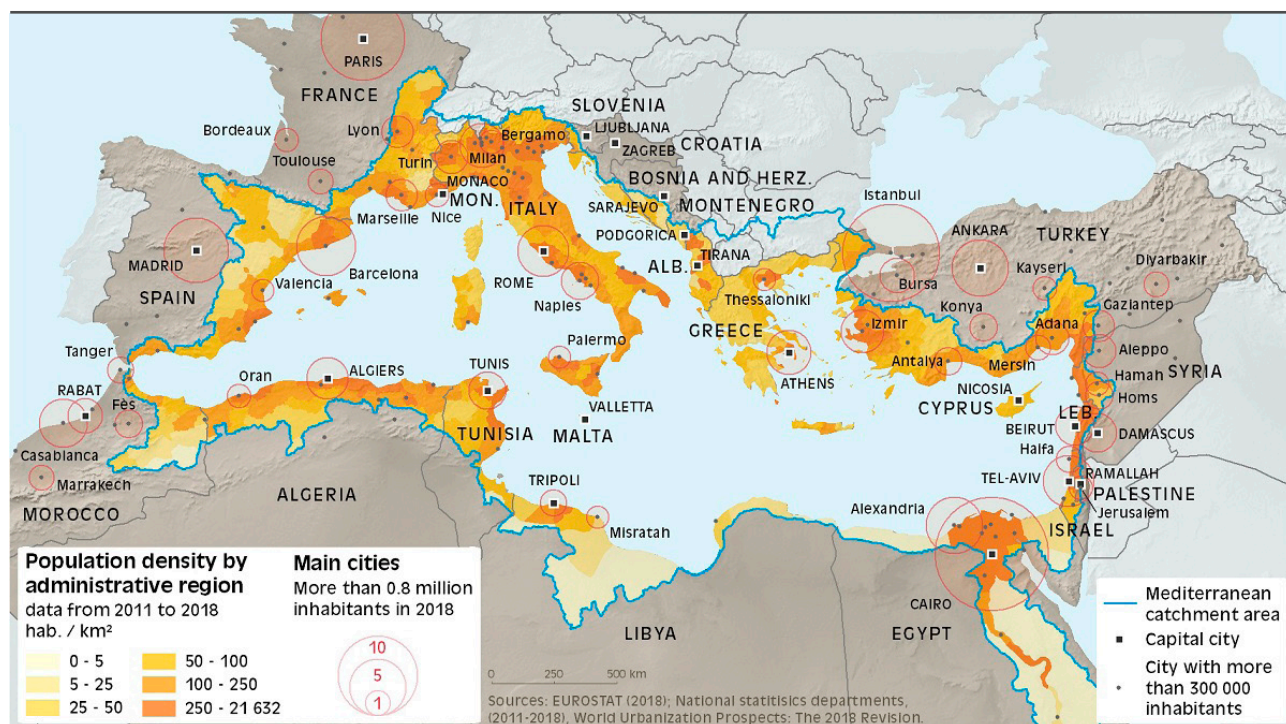
These vulnerabilities become even more pronounced in Mediterranean islands. Their limited size and resources increase the pressures they face, including water scarcity, waste management, and biodiversity loss. The economies of islands depend heavily on tourism, and as most are summer seasonal tourist economies, they are susceptible to all kinds of external shocks. In addition, islands are also microcosms where the impacts of climate change can be more easily observed. Understanding these particularities and vulnerabilities is critical to develop specific responses.

Figure 6. Main challenges facing international tourism in 2025



Source: UN Tourism Expert Group Survey (January 2025)

Figure 7. Population density by administrative region 2011-2018



Source: Plan Bleu. Available in: <https://www.obs.planbleu.org/en/maps/sea-coast-maps-illustrating-the-relationship-between-pressures-from-human-activities-and-the-environmental-states/>

### 3.1 Socio-economic Impacts

#### KEY MESSAGES

- Blue tourism generates employment, infrastructure development, and supports local economies in coastal areas
- At the same time, the growth of mass tourism drives rising living costs, unaffordable housing, and seasonal, insecure jobs; it also accelerates cultural erosion and undermines traditional sectors such as fishing
- Women and vulnerable communities, especially in developing Mediterranean nations, remain underrepresented in tourism employment

Blue tourism in the Mediterranean brings notable socio-economic benefits, including job creation, infrastructure development, and cultural exchange. However, it also poses significant social challenges, particularly due to mass tourism, which often leads to overcrowding and the overexploitation of coastal and marine environments.

Since 1960, the region's population has more than doubled—from 239 million to 571 million in 2023<sup>b</sup>—with 80% living within 150 km of the coast and 45% within 50 km. Population density in Mediterranean countries exceeds 100

inhabitants/km<sup>2</sup> on average, rising more rapidly in coastal areas<sup>59</sup> (Figure 7), due in part to tourism growth. This intensifies pressure on coastal communities and tourism job markets.<sup>60</sup>

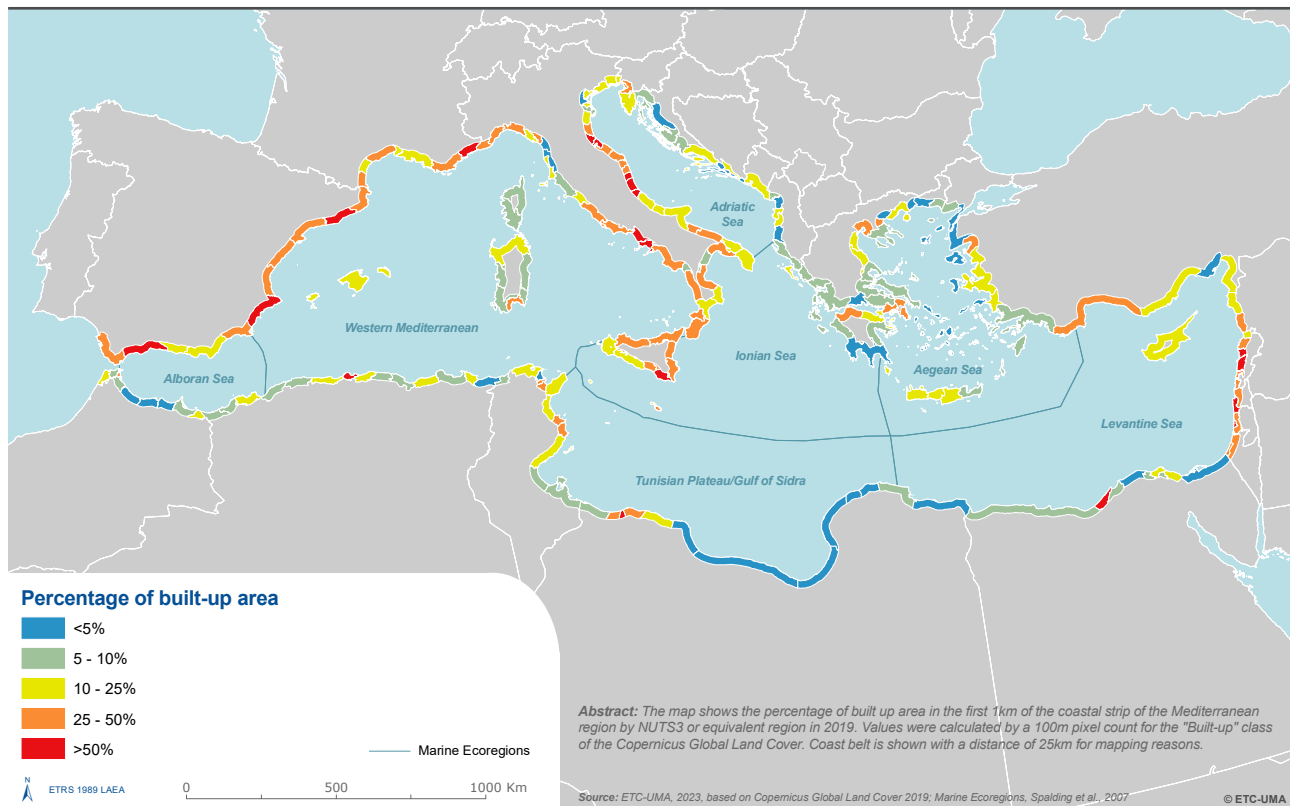
One of the most pressing issues is the strain on housing. Tourism, especially through growth in private holiday rentals and second homes, has significantly reduced the availability of affordable housing for residents. In Spain, second homes account for over 14% of the national housing stock—and over 30% in some provinces<sup>61</sup>—driving up prices. Following a brief decline during the pandemic, demand has rebounded, especially during peak summer months. For example, Valencia recorded nearly 1.6 million inbound visits to second homes in 2022, surpassing pre-pandemic levels.<sup>62</sup>

Mass tourism also contributes to broader social issues:

- Cultural homogenisation and decline of traditional sectors such as fishing and artisanal trades.
- Job insecurity, low wages, and intense workloads, especially in seasonal and informal tourism roles.
- Rising living costs, disproportionately affecting local and economically vulnerable populations.
- Social exclusion<sup>63</sup>, particularly among women and informal workers in Southern and Eastern Mediterranean countries (e.g. Algeria, Egypt, Lebanon, Syria), where access to formal employment, leadership, and capital is limited. While countries such as Italy, Spain, and Slovenia perform better, persistent gender inequalities call for equity-based planning frameworks.<sup>64</sup>

b. Own elaboration with World Bank data <https://data.worldbank.org/indicator/SP.POP.TOTL>

Figure 8. Percentage of built-up area in the 1km coastal belt by NUTS3 or equivalent region, 2019



Source: Mapping the Impact of Blue Tourism in the Mediterranean: Vulnerability Assessment of Coastal and Marine Ecosystems (IUCN & ETC-UMA, 2024)

*"The political effect that tourism has, the soft power, is so important. Finally, the world is looking at us and getting to know us. This is so important for the well-being of the nation, and it is amazing to see how it has changed. Two years ago, Albania was one of the 3 most searched words on the internet in Italy. But I am worried it might turn into a nightmare. We're making more money, but what if I were a teacher? Prices for food and rent are three times higher than 10 years ago. These things become very expensive or prohibitive for the local community, but for inbound tourists, they are not. So we are starting to feel the negative effects of tourism even if there is a lot of excitement because of the money it brings", says a local tour operator from Albania.*

These challenges are compounded by environmental pressures such as drought, desertification, and sea-level rise, which are contributing to population displacement—particularly from rural and coastal areas in the Southern and Eastern Mediterranean. Displaced individuals may resettle in areas already strained by tourism-related gentrification or infrastructure overload. While this exacerbates issues around housing, employment, and public services, tourism can also enhance social resilience by offering dignified employment, skills-building opportunities, and community integration for displaced populations.

The growth of mass tourism has led to the uncontrolled development of tourist establishments along the coastline, including beach resorts, spas and real estate projects,

resulting in widespread urbanisation and regional disparities in tourism infrastructure (Figure 8).

High densities of tourist establishments are found along Italy's western coast (from Genoa to Naples), and the Adriatic coasts of Italy and Croatia, as well as island regions such as Corfu, Rhodes and Malta.<sup>8</sup> In addition to coastal and island areas, Mediterranean port cities, such as Barcelona or Dubrovnik, illustrate how blue tourism also takes place in urban settings. In these cases, maritime flows heighten the concentration of visitors in historic centres and around ports, adding further pressure to cultural heritage, local infrastructure and urban ecosystems.

This uncontrolled growth has disrupted traditional economic systems, contributing to the decline of agriculture and fishing. In many coastal and marine areas, tourism has become the dominant—and often only—economic activity, increasing financial vulnerability. Residents face rising living costs and sharp seasonal fluctuations, with intense summer activity followed by winter stagnation. These imbalances threaten not only local well-being but also the long-term sustainability of tourism itself.<sup>24</sup> A summary of the socio-economic impacts of tourism in the Mediterranean is presented in Table 3.



Table 3. Socio-economic impacts of tourism in the Mediterranean region

Positive	
<ul style="list-style-type: none"> <li>• Support the preservation of local culture and traditions</li> <li>• Promote formal education to support the development of a skilled and competent workforce</li> <li>• Encourage cultural exchange</li> <li>• Enhance social inclusion</li> <li>• Urban regeneration</li> <li>• Job creation, employment</li> <li>• Contribute to community development by providing new economic opportunities and supporting local businesses</li> </ul>	<ul style="list-style-type: none"> <li>• Revenue generation and increased income for businesses and local governments through tourist spending on goods and services</li> <li>• Foreign exchange earnings for countries through spending by international tourists</li> <li>• Development of infrastructure such as transport networks, or other types of services (electricity grids, hospitality, water and waste management systems)</li> </ul>
Negative	
<ul style="list-style-type: none"> <li>• Overcrowding of public spaces (e.g. beaches and parks)</li> <li>• Gentrification and competition for land</li> <li>• Change in social norms: alteration of social behaviours, gambling, alcohol consumption, prostitution, etc.</li> <li>• Touristification and loss of identity of destinations</li> <li>• 'Tourism phobia': the aversion or social rejection that local citizens can feel towards tourists</li> </ul>	<ul style="list-style-type: none"> <li>• Seasonality of tourism employment</li> <li>• Low wages and inflexible working hours, limiting work-life balance</li> <li>• High cost of living for local residents</li> <li>• Rapid population growth, destabilisation of local economies</li> </ul>

Source: [Towards Sustainable Blue Tourism: Trends, Challenges and Policy Pathways](#) (Balestracci & Sciacca, 2023).

## 3.2 Environmental Impacts

### KEY MESSAGES :

- Blue tourism contributes to high resource consumption, waste generation, and low recycling rates, particularly in peak seasons
- Water scarcity is a growing threat across the Mediterranean, worsened by climate change and intensified tourist demand
- Uncontrolled coastal development leads to land degradation, habitat loss, and reduced ecosystem services
- Maritime traffic, including cruise ships and recreational boating, places heavy pressure on ecologically sensitive marine areas
- Biodiversity is declining, with flagship habitats like posidonia meadows and species such as fin whales at risk from unregulated tourism activities
- Inadequate governance and limited protection leave many vulnerable areas exposed, underscoring the need for integrated planning and enforcement
- Environmental degradation also contributes to human displacement, with implications for tourism destinations

The Mediterranean owes much of its appeal to its rich natural environment. However, uncontrolled tourism has placed immense pressure on both marine and terrestrial ecosystems, threatening their long-term viability.

This pressure stems largely from unsustainable consumption and production patterns, marked by high resource use, low recycling rates and inadequate waste management, especially during peak tourist seasons. These trends contribute to a cascade of environmental degradation, including:

i) land occupation and degradation due to uncontrolled coastal development,

ii) water scarcity due to overexploitation of freshwater resources,

iii) pollution, including plastics, wastewater, oil, chemicals, and noise from maritime traffic,<sup>65</sup> and

iv) loss of biodiversity, particularly in habitats like seagrass beds, worsened by climate change.<sup>66</sup>

These issues increasingly undermine the region's ecological integrity and the attractiveness of the Mediterranean as a tourist destination. [Figures 9, 11 and 12](#) illustrate how tourism pressure corresponds to ecological vulnerability in the Mediterranean.

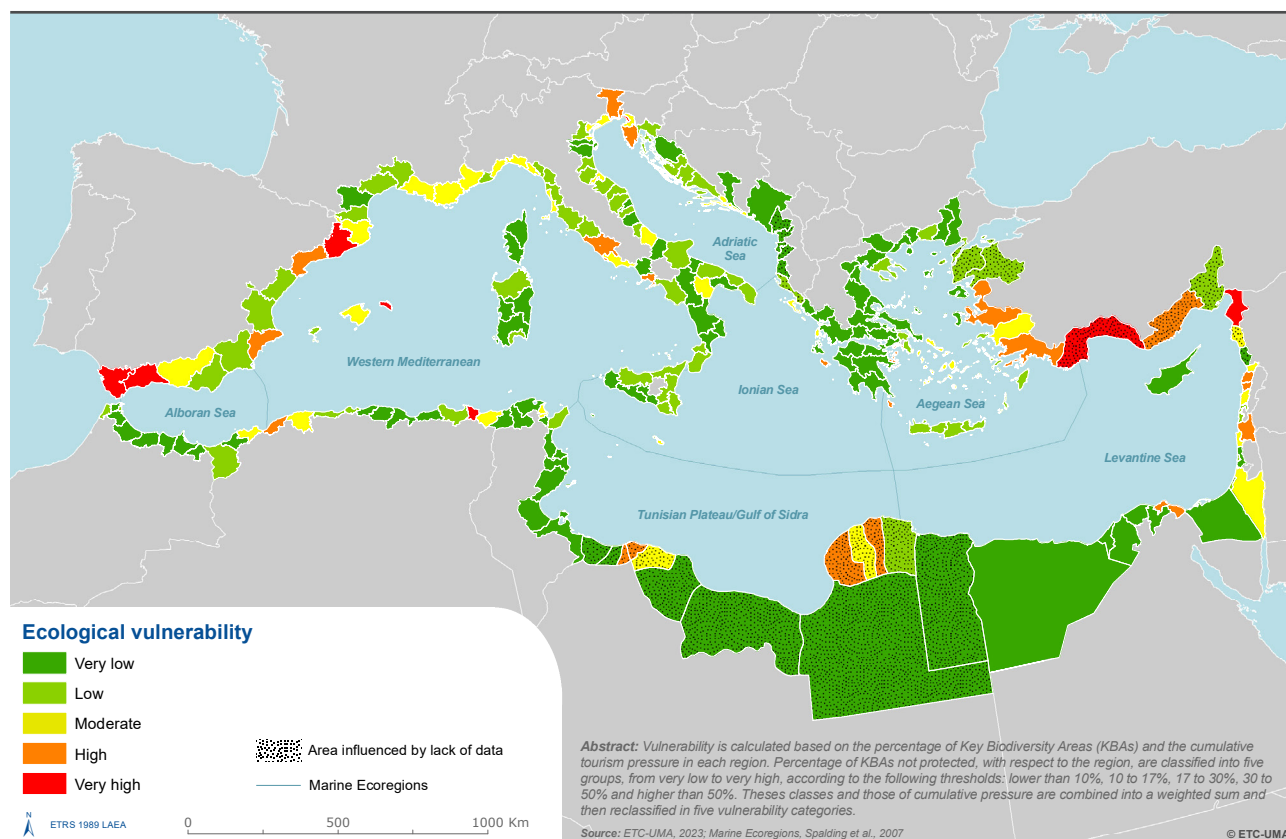
In some areas, the environmental consequences of climate change are also displacing communities from rural and low-lying coastal zones. Many of these displaced populations move to urban, peri-urban, or tourism-intensive areas, where they face new pressures related to housing, services, and livelihoods.

### 3.2.1. Land Degradation and Habitat Loss

Among the most visible impacts of tourism is the transformation of coastal landscapes. Uncontrolled development of hotels, resorts, marinas, and other infrastructure leads to land occupation and soil degradation. Ecological vulnerability is highest in parts of Western European Mediterranean and the Northern Adriatic, where dense development, high tourist numbers, cruise traffic, and marina expansion overlap with fragile ecosystems ([Figure 9](#)). Outside Europe, the coastal zones of Türkiye, especially Antalya and Hatay, and parts of Libya such as Tripoli and Benghazi, also rank among the most vulnerable, in part due to limited legal protection for natural areas.

These changes not only erode natural landscapes but also disrupt essential ecosystem services, such as shoreline stabilisation, carbon capture, and habitat provision, increasing long-term environmental and economic risks.

Figure 9. Ecological vulnerability to tourism by NUTS3 or equivalent region, 2022



Source: Mapping the Impact of Blue Tourism in the Mediterranean: Vulnerability Assessment of Coastal and Marine Ecosystems (IUCN & ETC-UMA, 2024)

### 3.2.2. Water Scarcity

Tourism also places immense stress on freshwater resources. The Mediterranean region holds just 3% of global freshwater reserves, yet it supports over half of the world's poorest populations. Climate change is intensifying droughts and forest fire risks, especially during summer months when tourist arrivals peak. Each year, around 218 million tourists—accounting for 32% of global tourism—visit the Mediterranean basin, adding significant pressure to water systems, particularly in areas where sources are already scarce (Figure 10).<sup>67</sup>

The situation is especially severe in southern Mediterranean countries (North Africa, Middle East) and islands, where water infrastructure is underdeveloped and investment remains limited. In contrast, northern Mediterranean countries are generally better equipped to manage scarcity, thanks to more resilient infrastructure and regulatory capacity.<sup>69</sup> This highlights the urgent need for integrated water management strategies across the basin—approaches that can handle seasonal surges in demand while ensuring sustainable access for residents and ecosystems.

### 3.2.3. Pollution and Waste Management Gaps

Plastic pollution is an escalating issue. An estimated 1.18 million tonnes of plastic have accumulated in the Mediterranean, with around 229,000 tonnes added annually,<sup>70</sup> mostly from Türkiye, Spain, Italy, Egypt, and France.<sup>71</sup> Much of this waste settles as microplastics in seabeds, impacting marine life and food webs.

Regional disparities in waste management are stark. While the Balearic Islands are set to become waste-free by 2025, many southern destinations lack basic infrastructure for sorting, recycling, or treating waste. The same applies to renewable energy capacity, which remains underdeveloped in parts of the region.

*“There are big differences not only between North and South but even between places like Montenegro and Crete. We want to promote Marine Protected Areas (MPAs) and to learn from more sustainable tourism models, like the one in the Balearic Islands,”* summarises a hotel sector representative.



Eastern Cap Bon lagoons, Tunisia ©Mubadarat/IUCN





*Posidonia oceanica* in the Mediterranean © Seadam/Dreamstime

**Figure 10. Water consumption in the nine municipalities of the Balearic Islands during the January-September season in 2019 and 2020<sup>68</sup>**

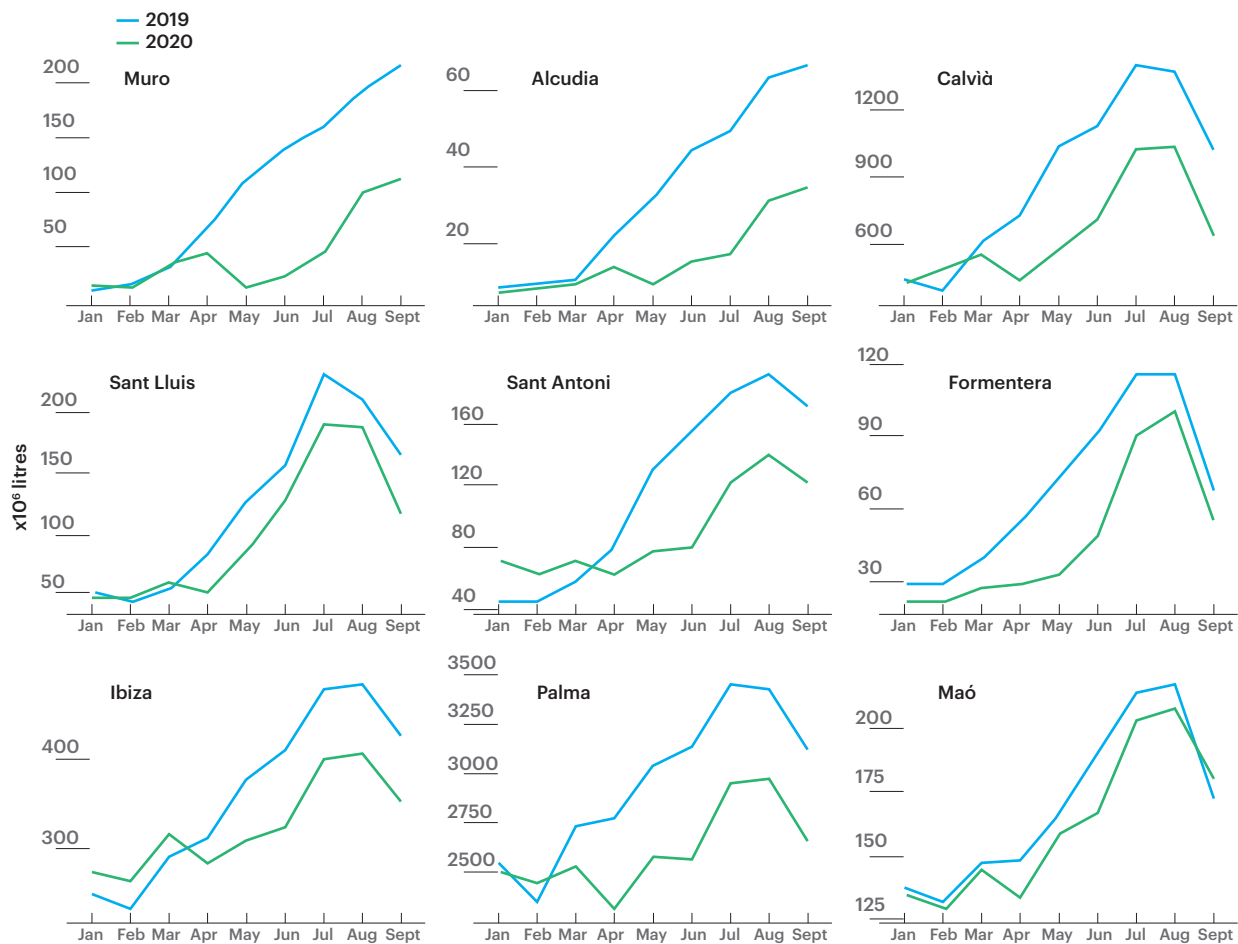
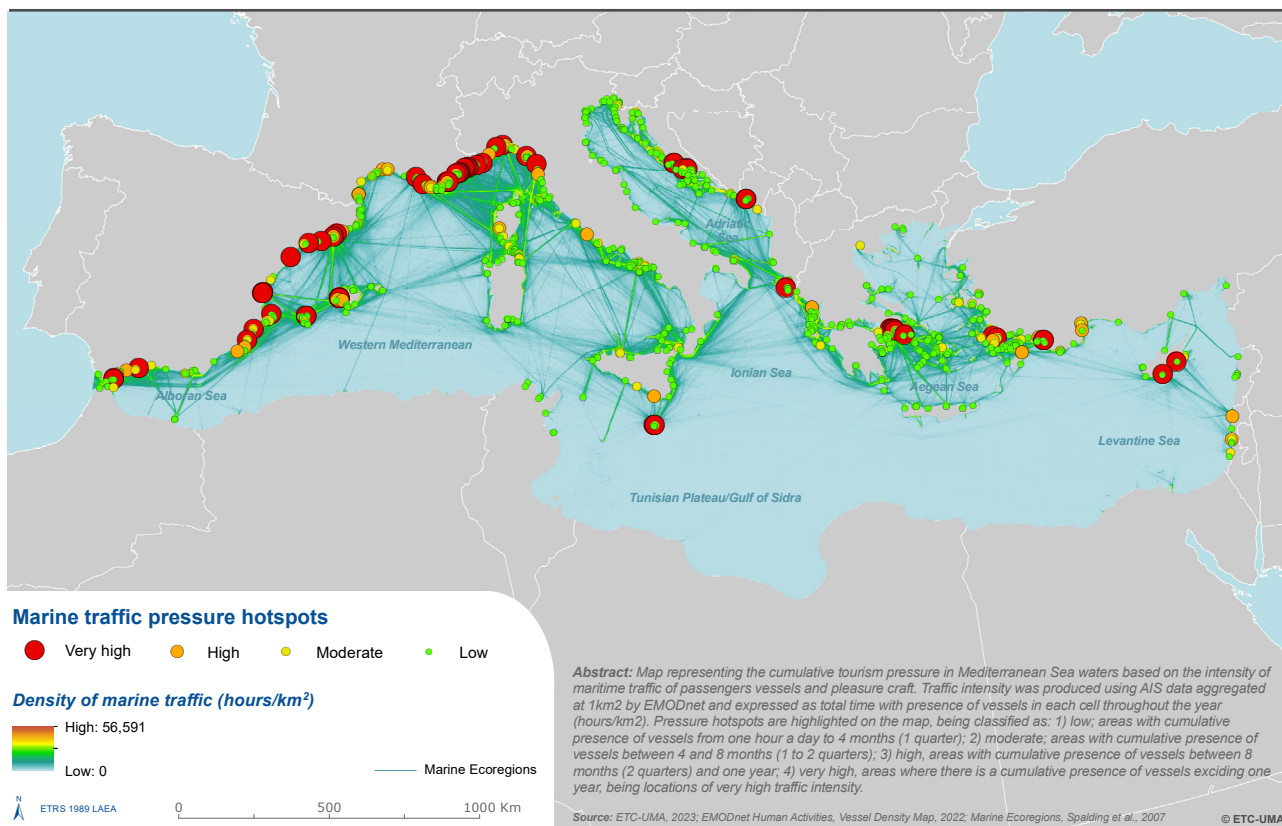




Figure 11. Cumulative tourism pressure in Mediterranean Sea waters in 2022 based on maritime traffic



Source: Mapping the Impact of Blue Tourism in the Mediterranean: Vulnerability Assessment of Coastal and Marine Ecosystems (IUCN & ETC-UMA, 2024)

### 3.2.4. Marine Pressures and Biodiversity Decline

Tourism-related marine activity has become a major driver of environmental stress in the Mediterranean. The region accounts for 15% of global maritime stopovers and 10% of shipping<sup>72</sup>, including cruise ships, private yachts, ferries, and an increasing number of recreational boats. Many of these vessels traverse ecologically sensitive marine areas, compounding existing environmental pressures (Figure 11).

This intensification of maritime traffic contributes to a range of ecological threats:

- Chemical pollution from fuel discharge and waste,
- underwater noise that disrupts communication and navigation of marine species,
- physical disturbances from anchoring and boating, and
- collisions (or ship strikes) involving vulnerable marine fauna.

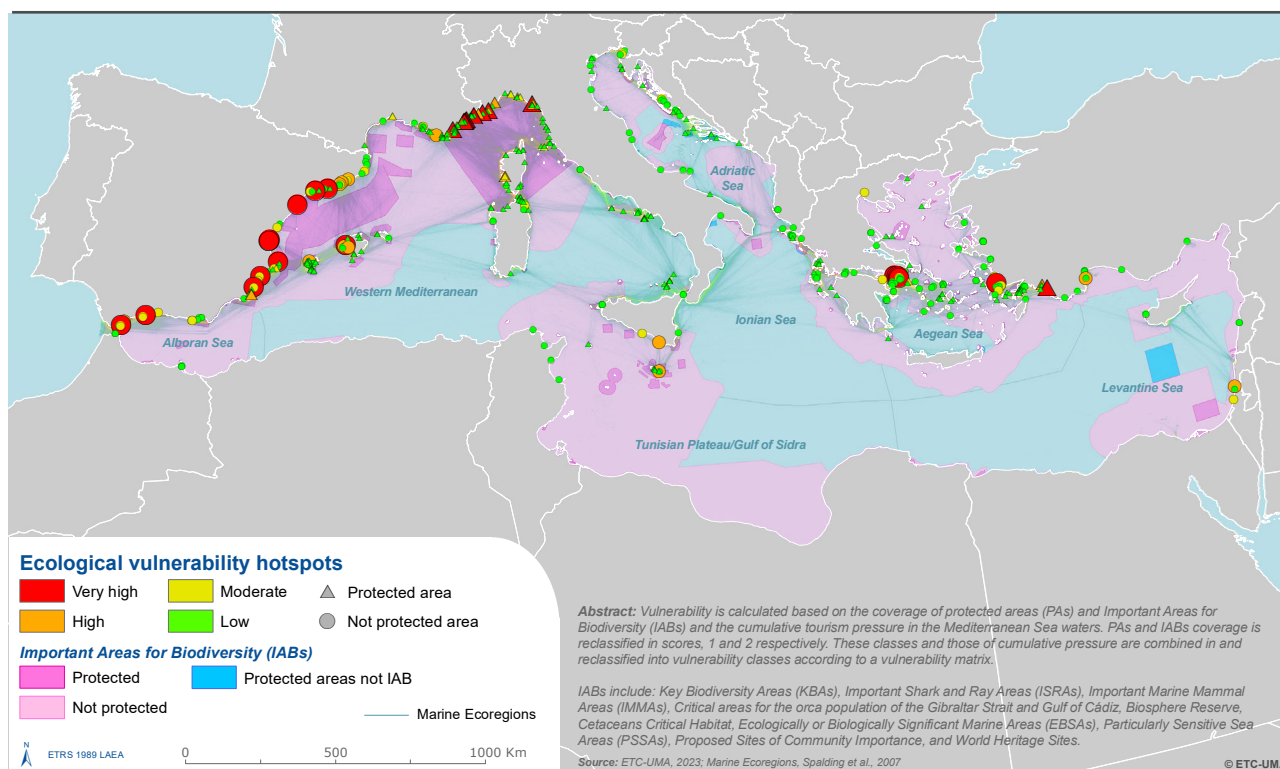
These pressures are a key factor behind the accelerating decline of marine biodiversity in the Mediterranean. As shown in Figure 12, vulnerability hotspots are concentrated along the Spanish coast (Alboran Sea and Western Mediterranean), the French Riviera and in the Aegean Sea, particularly near Athens and Muğla, where high tourism intensity overlaps with sensitive habitats. These zones host rich biodiversity but often lack sufficient legal protection or enforcement capacity. While some regions, such as the Pelagos Sanctuary in the Ligurian Sea, provide partial safeguards, others in Spain, Türkiye, and Greece remain exposed to unregulated activities.

Among the most affected habitats is the seagrass species *Posidonia oceanica*, which is critical for coastal protection,



Cala Iris, Al Hoceima, Morocco ©Mubadarat/IUCN

Figure 12. Ecological vulnerability to tourism in Mediterranean waters, 2022



Source: Mapping the Impact of Blue Tourism in the Mediterranean: Vulnerability Assessment of Coastal and Marine Ecosystems (IUCN & ETC-UMA, 2024)

oxygen production, carbon sequestration, and as a nursery for marine life. It is particularly vulnerable to damage from anchoring, recreational boating, and unregulated fishing. Posidonia meadows, whether protected or not, receive disproportionately high maritime traffic compared to other territorial waters, calling for urgent reassessment of permitted uses in these areas, especially during the peak summer.<sup>73</sup>

## BOX 2. MANAGING POSIDONIA BANQUETTES FOR COASTAL RESILIENCE: INSIGHTS FROM POSBEMED, POSBEMED2 AND POSBEMED+

Over the past decade, the POSBEMED projects have provided a unique continuum of knowledge and practice on *Posidonia oceanica* banquette management. Their combined legacy highlights key insights for coastal resilience across the Mediterranean.

- Ecological evidence is clear: banquettes act as natural buffers that protect beaches from erosion and storm surges, they support biodiversity and act as natural carbon sinks.

- Governance remains central: engaging municipalities, tourism operators, and local communities has proven essential to shift perceptions from “waste to be removed” toward “natural assets to be conserved.”

- Scalability is possible: POSBEMED+ guidelines and protocols<sup>74,75</sup> are ready to inform coastal policies and nature-based tourism strategies across the basin.

Flagship marine species are also increasingly at risk. The north-western Mediterranean is a key habitat for fin whales (*Balaenoptera physalus*)<sup>76</sup>, yet many major shipping routes pass directly through Marine Protected Areas (MPAs), including large Natura 2000 sites. The International Whaling Commission (IWC) Scientific Committee has raised concerns about rising ship strike risks against populations of fin and sperm whales<sup>77</sup>, particularly in the Gulf of Lion, where the Spanish cetacean migration corridor, now recognised as a Particularly Sensitive Sea Area (PSSA), intersects with dense cargo, cruise, ferry, and recreational traffic. Alongside the risk of collisions, whales are also affected by chronic noise exposure and chemical contamination, which undermine their reproductive and migratory behaviour, as well as overall ecosystem health.

Effective climate adaptation in coastal tourism requires spatially explicit planning, grounded in robust climate risk data. Integrating water stress projections, heat risk zones, and sea-level rise scenarios, drawing on sources such as MedECC and the IPCC, into tourism planning, land use strategies, and investment decisions is essential for long-term resilience. These mounting pressures underscore the need for urgent reform in tourism development across the Mediterranean. The tourism industry must now lead by embedding sustainability and nature conservation into its planning, operations, and governance models, not only to safeguard ecological assets, but to secure the region’s viability as a world-class destination in a changing climate.

### 3.3. Impacts of Multiple Crises

Mediterranean tourism faces growing pressure from overlapping crises—most notably the recent COVID-19 pandemic, geopolitical instability, and climate change. These disruptions have exposed the sector's fragility, especially in coastal and nature-based destinations, and highlighted the need for greater resilience. This chapter explores how each crisis has affected tourism in the region and why a shift toward more sustainable and adaptive models is urgently needed.

#### 3.3.1 COVID-19 and Tourism

##### KEY MESSAGES

- The COVID-19 pandemic exposed the structural vulnerability of Mediterranean tourism, especially for SMEs and women workers.
- Domestic and nature-based tourism surged during the pandemic but has since declined in many Western Mediterranean destinations.
- Recover patterns vary significantly across subregions, with signs of growth in Eastern and Southern Mediterranean blue tourism areas.
- The crisis offers a pivotal opportunity to accelerate sustainability in the tourism sector.

The COVID-19 pandemic severely disrupted global tourism, with lockdowns, border closures, and travel bans hitting the sector hard.<sup>78</sup> In 2019, tourism contributed 10.3% to global GDP and supported 333 million jobs. However, in 2020, international travel declined by 72%, causing a loss of 62 million jobs and a 69.7% drop in visitor spending.<sup>79</sup> Blue tourism, especially coastal and maritime tourism, was among the most affected, with a 64% decrease in gross value added (GVA) and a 48% decrease in employment.

Air travel and cruise operations were suspended, disproportionately affecting SMEs (80% of the sector) and women (54% of the tourism workforce).<sup>80</sup> Travel preferences shifted toward domestic and nature-based tourism, with increased pressure on coastal ecosystems.<sup>81</sup> Mediterranean destinations like France and Spain saw rising domestic visitor numbers, showing the resilience of regional BT (Figure 13). Recovery began slowly in 2022, but remained 61% below 2019 levels. The Middle East and Europe, especially the Mediterranean, led the rebound.<sup>82</sup> By 2024, BT was the EU Blue Economy's main contributor to employment (54%) and GVA (29%).<sup>27</sup> Accommodation sectors in regions like the Turkish Aegean and western Mediterranean showed resilience, while areas like Catalonia, Balearic Islands, and some Balkan coasts lagged.<sup>8</sup>

Cruise tourism, entirely halted for five months in 2020, has recovered unevenly. Some ports surpassed 2019 figures, while others remained below.

The question of whether travel behaviours have permanently changed following the pandemic remains unresolved. Some researchers (e.g. González et al., 2022<sup>83</sup>) argue that behavioural shifts are moderate or non-existent. Others (Lew et al., 2020<sup>84</sup>; Mirzaei et al., 2021<sup>85</sup>; Mendieta, 2022<sup>86</sup>), identify more significant transformations in tourist profiles, including:

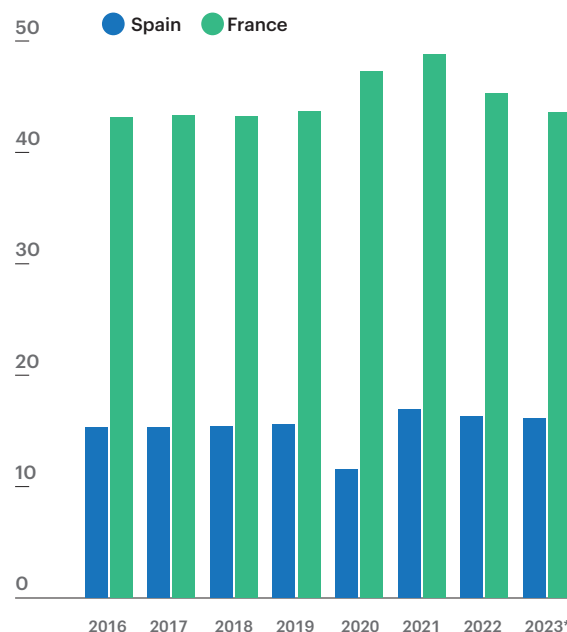
- A preference for closer, easily accessible destinations;
- reduced disparity in trip duration for national vs. international travel;

- a decline in the use of tourist apartments abroad in favour of hotels; and
- increased use of private vehicles for international travel, though air travel remains predominant for domestic trips.

However, more data are needed to determine the durability of these changes. As such, continued monitoring and updated research will be crucial in the coming years. In the Mediterranean in particular, there is evidence that the COVID-driven increase in the importance of BT domestic Mediterranean tourism is temporary. In Spain, for example, domestic tourism's share in its Mediterranean regions rose during the pandemic but declined in the aftermath—from 45.3% in 2022 to 43.6% (Jan–Aug 2023), returning to pre-pandemic levels.

Conversely, the tourism impact in BT regions in the Eastern and Southern Mediterranean is increasing, providing indications of a possible shift in focus. This shift is particularly evident in spending and national arrivals, which are outpacing the Western Mediterranean (Table 4).

**Figure 13. Share of Mediterranean domestic tourism arrivals as a proportion of total domestic arrivals at destination, 2016–2023 (%)**



Source: Insee (France); Instituto Nacional de Estadística (Spain).

\* : YTD, France January-July, Spain January-August



Table 4. Domestic tourism arrivals\*, Eastern and Southern Mediterranean, 2018–2022

	2018	2019	2020	2021	2022	Growth 19 vs 18 (%)	Growth 22 vs 19 (%)
Western Mediterranean	926,981	900,185	605,559	775,790	839,515	-2.9%	- 6.7%
Eastern Mediterranean	258,168	260,220	150,096	177,848	179,988	0.8%	- 30.8%
Southern Mediterranean	13,028	13,552	6,588	10,986	14,585	4.0%	7.6%

Source: UNWTO. Note: \* For countries that returned data during the period 2018–22; East = Albania, Bosnia and Herzegovina, Croatia, Greece, Israel, Malta, Montenegro, Türkiye; South = Morocco, Tunisia

*“I see development in the East Mediterranean as an opportunity because these are all destinations which have a very competitive basis. For example, in reaction to global warming, seasonality in the eastern Mediterranean can be extended. Additionally, the administrations in these developing Eastern Mediterranean destinations are very supportive of all sorts of sustainability initiatives, especially from major operators. What they lack, however, is capacity. Mostly the problem is about how to get into these kinds of actions,”* says a representative from a large outbound tour operator.

While overall growth in domestic tourism in the Eastern Mediterranean was still negative in 2022 compared to 2019 (-30.8%), individual destinations saw notable gains: Bosnia and Herzegovina +27.8%, Israel +16.1%, Malta +55.7%, and Montenegro +7.5%.

Mediterranean tourism now stands at a crossroads. The pandemic may represent a unique opportunity to rethink and transform the sector, driven by changes in individual behaviour.<sup>87</sup> This could mean moving towards more sustainable, resilient, and inclusive tourism models, or returning to previous patterns of excessive growth. To secure a prosperous and balanced future, bold, green recovery strategies will be essential.

### 3.3.2 Geopolitical Instability

#### KEY MESSAGES

- The Mediterranean’s geostrategic location makes it highly exposed to regional and global geopolitical tensions
- Security threats, conflicts, and terrorism have directly impacted tourism in countries like Egypt, Tunisia, Türkiye, and Israel
- Despite heightened risks and rising costs, tourism in many parts of Europe has shown resilience in the face of ongoing global crises
- Geopolitical instability also causes indirect shocks, such as inflation, fuel price spikes, and disrupted travel confidence, that increasingly influence tourism flows and investment decisions

The Mediterranean’s strategic position between regions makes it a focal point of global interest and geopolitical tension. Conflict-driven displacement has added to existing economic and security challenges, with many displaced people settling in coastal or peri-urban areas that are also key

tourism zones, intensifying pressure on already fragile local systems.

Security is vital for tourism. Between 2010 and 2017, the Mediterranean region recorded nearly 10,000 terrorism-related incidents, concentrated in conflict-prone countries, such as Libya (22.9%), Syria (21.1%), and Egypt (19.5%). Other affected countries include Türkiye (15.8%), Israel (6.2%), Lebanon (4.8%), and Greece (2.7%).<sup>88</sup>

- **Egypt** has suffered major attacks on tourist zones, drastically reducing tourist arrivals and revenue.<sup>89</sup>
- **Tunisia** has faced similar challenges, with tourists now mostly confined to all-inclusive resorts that limit economic benefits to local communities.
- **Türkiye**, though not directly impacted by the Arab Spring, experienced a severe tourism drop in 2016 due to attacks in key cities like Istanbul and Ankara—losing nearly 9 million tourists before recovering in 2017.
- **France**, a top global destination, also saw a decline of 2 million visitors in 2016 after terrorist attacks.<sup>88</sup>

#### Ongoing conflicts compound tourism impacts:

- The **Russia-Ukraine war** has increased fuel and travel costs, adding pressure to the tourism sector. While these increases could be expected to suppress demand, tourism in Europe has shown notable resilience. This suggests that while geopolitical tensions and inflation have heightened uncertainty, they have not substantially dampened overall tourism flows. However, traveller confidence remains fragile<sup>90</sup> and the war continues to affect specific outbound markets, namely Russia and Ukraine, both of which have contracted significantly. Together, these markets previously accounted for around 3% of global tourism spending, with the conflict potentially contributing to a reduction of up to \$14 billion in global tourism revenue.<sup>91</sup>
- The **Israel-Palestine conflict** continues to disrupt the region, causing interruptions in trade, investment, tourism and the economic development of the affected regions. Following the October 2023 attacks, Israel saw an 80% drop in tourists in early 2024 and a 96% decline in same-day visits. Israelis are also limiting their travel abroad, with a decrease of around 50% year-on-year.<sup>92</sup> Many tourist zones now host evacuees, straining local businesses.<sup>93</sup>
- **Lebanon**, destabilised by the Syrian war and regional tensions, has seen tourism’s share of GDP drop from 20% pre-war to just over 10%. A 40% sector-wide decline has led to widespread business closures, especially in Beirut. Security concerns and deteriorating infrastructure continue to deter visitors. In fact, consumer confidence

has not rebounded since 2014, when a historic drop of 14% was recorded.<sup>94</sup> The limited tourism that remains is centred in northern coastal towns like Jounieh, Byblos, and Batrun.<sup>95</sup>

Beyond the direct impacts of armed conflict and terrorism, the Mediterranean tourism sector is increasingly vulnerable to indirect global shocks that arise from or are exacerbated by geopolitical tensions, including inflation, energy volatility, and climate extremes.

### 3.3.3 Climate Change

#### KEY MESSAGES :

- The Mediterranean is especially vulnerable to climate change due to its enclosed sea and mountainous surroundings
- Rainfall is becoming scarcer and more intense
- Rising sea levels, marine heatwaves, and biodiversity loss are threatening tourism assets and coastal ecosystems
- Climate change is reshaping seasonality, operational costs, and destination attractiveness, requiring urgent adaptation by the tourism sector

The Mediterranean region faces acute climate vulnerability due to its semi-enclosed sea, mountainous terrain, and densely populated coasts. Climate change acts as a threat multiplier, worsening existing pressures such as urbanisation, biodiversity loss, and water stress.<sup>96</sup> The region is warming 20% faster than the global average, and sea surface temperatures could rise by 1.8 to 3.5°C by 2100, especially along the Spanish and eastern Mediterranean coasts.<sup>97</sup>

#### 3.3.3.1. Drought Periods and Rainfall Extremes

Drought periods are intensifying across the Mediterranean, posing a severe and growing threat to water availability. Climate change is altering hydrological patterns: overall rainfall is declining, while becoming more erratic and intense. Torrential rain events are increasing, leading to flash floods and soil erosion, but failing to replenish groundwater and reservoirs consistently. Meanwhile, prolonged dry spells are becoming more frequent and more severe.<sup>98</sup>

By 2050, water demand in the region is expected to double or even triple, while rainfall becomes less frequent but more intense, triggering flash floods and soil erosion. A 2-4°C temperature increase could reduce rainfall by 30% in southern Europe<sup>97</sup>, and by up to 40% in winter<sup>99</sup>, severely impacting agriculture, food security, and tourism services.<sup>100</sup>

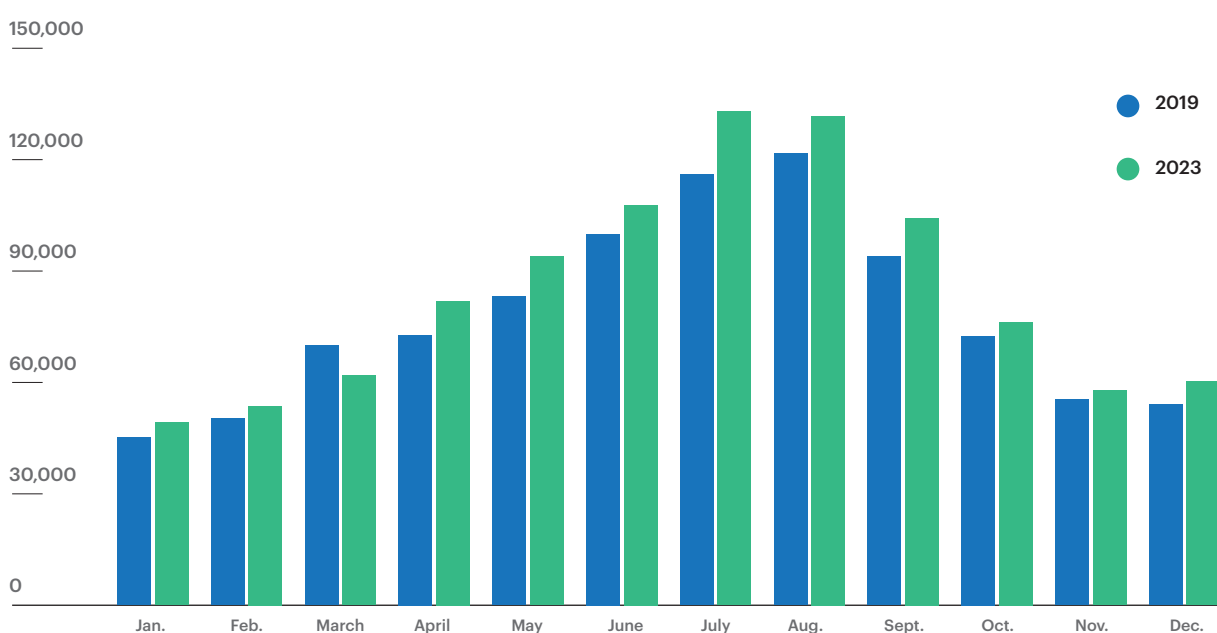
This is already evident in destinations such as Sicily and Sardinia, where the 2024 drought reduced reservoir levels by 60%. Hotels in affected areas had to import water at costs up to €10,000 per week<sup>101</sup>, a burden that directly raised tourist prices and jeopardised service continuity, especially in small and medium-sized establishments.

This evolving climate reality calls for urgent investment in water-saving technologies, supply diversification, and the integration of water resilience into tourism and regional development planning.

#### 3.3.3.2. Coastal Erosion and Sea-level-rise

Sea levels are rising at an accelerating rate, from 1.4 mm year<sup>-1</sup> in the 20th century to 2.8 mm year<sup>-1</sup> in the last three decades, due to thermal expansion and melting ice caps. This results in coastal flooding, shoreline retreat (up to 65 metres by 2100 under a very high emissions scenarios<sup>102</sup>), and beach loss.

Figure 14. Arrivals, EU-27 tourist accommodation establishments\*, monthly, 2019 vs 2023



Source: Eurostat. Note: \* = excluding Turkey; accommodation = hotels; holiday and other short-stay accommodation; camping grounds, recreational vehicle parks and caravan parks.

In Greece, 40% of beaches have lost between 5-10 metres of shoreline in just the last decade, causing an estimated €50 million annual loss in tourism revenue. Across the Mediterranean, stronger storms and rising seas threaten over €100 billion in tourism assets<sup>101</sup>, eroding the foundational “sun-and-sea” appeal of the region.

### 3.3.3.3. Shifting Seasonality and Infrastructure Demands

Heatwaves in summer are now pushing tourists to travel during cooler shoulder seasons. Destinations like Cyprus and Malta have reported a 10–15% increase in spring and autumn bookings since 2020<sup>101</sup>, reflecting demand for more temperate conditions. While this can help desaturate peak periods, it also requires year-round adaptation of infrastructure and services, such as energy use, staffing, and public transport, which were originally designed for short summer peaks.

**Figure 14** supports this shift, showing that in 2023, spring and autumn arrivals outpaced those of 2019 in several EU countries, suggesting that seasonality is structurally changing.

### 3.3.3.4. Heatwaves and Human Health

The Mediterranean is increasingly experiencing prolonged, intense heatwaves, which threaten both human health and tourism infrastructure. The number of “tropical nights”, where temperatures do not drop below 20°C, is rising sharply, depriving both tourists and workers of adequate overnight rest. In cities like Athens and Barcelona, tropical nights have more than doubled since the 1990s, with projections showing continued growth through mid-century.<sup>103</sup>

These extreme temperatures can cause heatstroke, dehydration, and cardiovascular stress, especially among vulnerable groups such as older travellers, outdoor tourism staff, and people without air conditioning. The energy demand for cooling is surging, placing strain on local grids and increasing emissions. Hospitality facilities, especially older or budget accommodations, may struggle to ensure thermal comfort, which could affect visitor satisfaction, health standards, and insurance liabilities.

Heatwaves also amplify inequality: low-income tourists and workers may lack access to cooling infrastructure, while wealthier travellers shift to milder destinations or seasons. This divergence is likely to affect tourism flows, with repercussions for demand, insurance, and safety standards. As such, heat adaptation must become a strategic pillar of Mediterranean tourism policy, involving climate-resilient design, urban greening, and public health protocols.

### 3.3.3.5. Marine Ecosystems and Biodiversity Loss

Marine heatwaves and rising ocean temperatures are causing mass mortality of native species and encouraging invasive thermophilic species, disrupting fishing and tourism. On land, growing populations in exposed coastal zones increase the risk of disasters.

Loss of marine and coastal biodiversity is also harming tourism. In coral and seagrass ecosystems, degradation is reducing their role as tourism assets. Coral bleaching, habitat loss, and species decline are shrinking the viability of coastal tourism models.<sup>101</sup>

### 3.3.3.6. Tourism’s Carbon Footprint

The sector’s own environmental footprint cannot be overlooked. The tourism industry heavily depends on air travel, energy-intensive infrastructure, and long-distance supply chains. For example, Spain’s tourism sector emitted 40 million tonnes of CO<sub>2</sub> in 2023, with transport accounting for 60% of that figure.<sup>101</sup> Without significant efforts to decarbonise mobility and accommodation, tourism risks deepening the climate crisis that already threatens its survival.

These converging climate impacts, from water stress and heatwaves to biodiversity collapse and shifting seasonality, underscore the urgent need to accelerate climate action in the tourism sector. This requires comprehensive strategies that go beyond site-level adaptation and embrace systemic change across supply chains, governance, and mobility.

The Glasgow Declaration on Climate Action in Tourism (2021)<sup>104</sup>, endorsed by hundreds of public and private sector actors, calls for halving tourism emissions by 2030 and achieving net zero as soon as possible before 2050. Meeting these goals demands:

- Decarbonising transport, especially aviation and cruise sectors, which account for the majority of emissions;
- electrifying local mobility and improving rail and ferry connectivity;
- retrofitting accommodations for energy efficiency and clean energy use;
- supporting SMEs and destinations in emissions monitoring and resilience planning; and
- shifting consumer behaviour, marketing lower-impact experiences and rewarding longer, slower travel.

Nature-based Solutions (NbS) offer a crucial pathway for local climate mitigation and adaptation.

*“Nature-based Solutions are actions to protect, manage, and restore natural or modified ecosystems sustainably that address societal challenges effectively and adaptively, simultaneously providing benefits for human well-being and biodiversity.”<sup>105</sup>*

NbS can improve resilience in tourism areas by enhancing carbon sequestration, regulating temperatures, buffering storms, and maintaining ecosystem services critical to tourism. Since the late 1990s, IUCN has promoted nature-based approaches, formally coined as NbS in 2016 and culminating in the 2020 Global Standard<sup>105</sup>, a framework to design, implement, and scale such actions.

While powerful, NbS alone are not sufficient for Mediterranean tourism to become climate-resilient and sustainable. NbS must be complemented by bold mitigation efforts, particularly in high-emitting segments like international transport.



## 4. Stakeholders and Governance Frameworks

### KEY MESSAGES

- Public bodies are central to blue tourism development
- IGOs and NGOs drive sustainability efforts
- Regional cohesion is increasing, especially around low-impact visitor infrastructure
- A clear roadmap exists for the green and digital transition
- Marine Protected Areas (MPAs) play a key role in environmental protection
- The Barcelona Convention includes political commitments to the blue economy and sustainable tourism in the Mediterranean

### 4.1 Key Stakeholders

This chapter explores the governance and stakeholder landscape of blue tourism in the Mediterranean. It examines the institutional actors, governance frameworks, and key initiatives that shape and influence sustainable coastal tourism development.

Tourism in the Mediterranean depends on a wide network of actors who influence how destinations are developed, managed, and sustained. This chapter outlines the main stakeholder groups driving sustainable coastal and blue tourism: public authorities and Destination Management Organisations (DMOs), academic and research institutions, intergovernmental organisations (IGOs), non-governmental organisations (NGOs), sectoral and technical institutions, and small and medium enterprises (SMEs).

While their mandates and capacities differ, these stakeholder groups often collaborate to achieve shared goals. Public authorities and DMOs typically provide regulatory frameworks, strategic direction, and destination-level coordination. Academic and research institutions contribute data, tools, and critical insights that inform planning and impact assessment. Intergovernmental organisations foster regional alignment, technical cooperation, and funding mechanisms across countries. NGOs support implementation on the ground, advocate for environmental and social safeguards, and facilitate community engagement. Lastly, SMEs and collective business forums are the operational backbone of the sector, delivering experiences to visitors and anchoring tourism within local economies. Together, these actors form a complex but necessary ecosystem for advancing sustainable blue tourism in the Mediterranean.

#### 4.1.1 Public Authorities and DMOs

The European Union is the most influential supranational authority shaping the growth and regulation of the blue economy and blue tourism in the Mediterranean. At the sub-regional, regional and national levels, public authorities are key to developing tourism as an economic, cultural, and social driver. Their roles and responsibilities typically include:

- Destination marketing and planning, typically undertaken by DMOs;
- policy and infrastructure development;

- licensing and regulation; and
- capacity-building and training for tourism stakeholders, such as SMEs.

Destination Management Organisations (DMOs) were originally focused on marketing, but have now evolved into strategic managers of tourism destinations.<sup>106</sup> This shift reflects the sector's growing complexity and the need to integrate sustainability across all tourism activities. Modern destination management requires a holistic approach—one that combines strategic leadership, efficient governance, and effective implementation. DMOs are now expected to coordinate planning, promotion, and stakeholder collaboration across multiple sectors and governance levels. By fostering public-private partnerships, engaging local communities, and aligning diverse actors under a coherent strategy, DMOs play a central role in achieving sustainable and resilient tourism outcomes. Their core roles now include:

- Strategic planning and promotion: Developing and implementing comprehensive strategies that enhance destination competitiveness while ensuring sustainability;
- stakeholder coordination: Facilitating collaboration among local governments, hotels, tour operators, transport services, residents, and other stakeholders to ensure cohesive destination management;
- managing sustainability and visitor pressure: Addressing challenges such as cruise tourism impacts and over-tourism in historic cities like Dubrovnik or Venice through sustainable practices and policies;
- creating unique, competitive destination identities: Leveraging cultural assets (e.g., Greek islands), gastronomy (e.g., Italy, Lebanon), and niche tourism opportunities (e.g., luxury tourism in the French Riviera, ecotourism in Croatia) to differentiate and promote destinations.

In the Mediterranean, where tourism is a major economic pillar, DMOs are crucial facilitators of both development and sustainability.

Complementing these national and local efforts, the European Travel Commission (ETC)<sup>c</sup> serves as a key pan-European coordination and advocacy body for national tourism organisations (NTOs). The ETC was established to promote Europe as a tourist destination in long-haul markets. It currently includes 33 member NTOs and 14 associate private sector members. Mediterranean members include Croatia, Cyprus, France, Greece, Italy, Malta, Monaco, Montenegro, Slovenia, Spain and Türkiye.

The European Commission develops tourism policy to pursue the following objectives:<sup>107</sup>

- Stimulating the competitiveness of the European tourism sector;
- reducing seasonality in tourism;
- fostering innovation within the tourism industry;
- promoting sustainable, responsible and high-quality tourism; and
- encouraging the use of EU financial instruments to support tourism.

c. The European Travel Commission (ETC), a public-private partnership of NTOs, should not be confused with the European Commission's internal tourism initiatives, which also pursue strategic tourism objectives.

The focus on sustainable and responsible tourism directly aligns with the goals of BT, particularly given the importance of coastal and maritime tourism for Mediterranean NTOs.

#### 4.1.2 Academia

Universities and research institutions are essential contributors to the study and development of coastal tourism. They provide:

- Research and data on tourism's economic, social and environmental impacts—informing policy and decision-making (e.g. alignment with the Sustainable Development Goals);
- education and training to build the skills needed in the sector, particularly among youth;
- policy analysis and best practices, supporting tourism operators, policymakers and other stakeholders in adopting responsible, sustainable approaches;
- community engagement through surveys and fieldwork to incorporate local perspectives and needs into planning and decision-making; and
- technology and innovation development, such as sustainable tourism management tools, and impact monitoring systems. An example is a blue tourism mapping tool to assess the vulnerability of Mediterranean coastal and marine ecosystems, recently developed by the University of Malaga (UMA).<sup>8</sup>

#### 4.1.3 Intergovernmental Organisations (IGOs)

Intergovernmental organisations (IGOs) promoting the advancement of sustainable and inclusive tourism through regional cooperation, policy frameworks, and technical guidance. In the Mediterranean, several IGOs and hybrid organisations are actively engaged in supporting sustainable blue tourism and aligning it with broader environmental, economic, and social goals.

##### Union for the Mediterranean (UfM)

Established in 2008, the UfM brings together the EU member states and 16 Southern and Eastern Mediterranean countries. It fosters regional cooperation across various sectors, including tourism.

- In 2015, the UfM promoted the Ministerial Declaration on Sustainable Blue Economy<sup>108</sup>, encouraging employment, innovation, and knowledge-based maritime industries.
- In response to ongoing challenges including COVID-19, climate change, and biodiversity loss, member states reaffirmed their commitment to a sustainable blue economy in 2021. For the first time, sustainable maritime and coastal tourism is the object of a dedicated, stand-alone priority.
- In 2024, the UfM introduced a roadmap highlighting emerging frameworks and initiatives<sup>109</sup> to support sustainable maritime and coastal tourism, emphasising partnerships and synergies across the region.

##### International Union for Conservation of Nature (IUCN)

Although unique in its hybrid structure combining both governmental and non-governmental members, the IUCN functions as a leading intergovernmental authority in the fields of biodiversity, nature-based solutions, and sustainable development. Through its Centre for Mediterranean Cooperation (IUCN Med), based in Málaga, Spain, the organisation

implements numerous initiatives that link tourism with conservation.<sup>110</sup> These include: promoting sustainable tourism in and around protected areas; strengthening the governance and capacity of local actors through training and tools; supporting the integration of biodiversity values and ecosystem services into tourism planning; and developing methodologies and guidelines for ecotourism development and visitor impact assessment.

#### 4.1.4 Non-governmental Organisations (NGOs)

Non-governmental Organisations (NGOs) include international, regional, and local civil society organisations that work independently of governments to promote social, environmental, and economic sustainability. In the context of blue tourism, NGOs act as key enablers of innovation, accountability, and community engagement. They advocate for responsible and inclusive tourism practices; provide sustainability training and certification tools for destinations and operators; engage local communities in co-management and benefit-sharing; conduct applied research and demonstration projects linking tourism with conservation and resilience; and promote equity, human rights, and cultural integrity within tourism planning.

- The **World Wildlife Fund (WWF)** has developed programmes to reduce the ecological footprint of tourism, particularly in sensitive coastal and marine ecosystems. Through WWF Mediterranean Marine Initiative (WWF Med), the organisation addresses key threats to marine ecosystems while promoting tourism models that respect ecological limits. Its initiatives often promote eco-certification, sustainable seafood consumption, and maritime spatial planning that considers tourism pressures.
- The **Global Sustainable Tourism Council (GSTC)** plays a critical normative role by establishing internationally recognised standards for sustainable tourism destinations and operators. It also manages certification and accreditation processes, which help align destination governance with global sustainability benchmarks.
- The **Conference of Peripheral Maritime Regions (CPMR)** brings together over 150 coastal and maritime regions across Europe and beyond. Its Intermediterranean Commission (IMC) brings together around 40 Mediterranean coastal and island regions to promote sustainable tourism through regional cooperation and EU policy influence, particularly through its Task Force on Culture and Sustainable Tourism. It works closely with EU institutions to ensure that tourism policies reflect the specific needs and challenges of peripheral and maritime areas, promoting sustainable models such as blue tourism, low-impact mobility, and diversification of local economies.
- **Green Destinations** provides tools, capacity-building, and peer-learning platforms to help destinations assess, improve, and communicate their sustainability performance. Its coastal and island destination programmes promote socio-economic inclusion, ecosystem protection, and cultural heritage valorisation.
- At the grassroots level, many **local NGOs and community-based organisations** are involved in implementing ecotourism projects, managing visitor flows in protected areas, and facilitating environmental education activities that foster stewardship among both residents and tourists.

#### 4.1.5 Sectoral and Technical Institutions

In addition to the primary governance and civil society actors, several sector-specific and technical institutions play key roles in shaping sustainable blue tourism in the Mediterranean. These include bodies responsible for maritime regulation, climate science, fisheries, and meteorological services. Their technical expertise and regulatory functions support evidence-based planning, risk reduction, and the integration of sustainability standards across tourism-related sectors.

They provide normative standards and safety regulations (e.g. for maritime transport and cruise tourism); generate and disseminate scientific data on climate risks, biodiversity, and marine ecosystems; support sustainable livelihoods through small-scale fisheries, community-based tourism, and food systems; and enhance tourism preparedness and adaptation to climate variability and extreme events. Some of those institutions include:

- The **International Maritime Organization (IMO)** sets global safety, security, and environmental standards for shipping and cruise industries. Its regulations influence port infrastructure, emissions control, and cruise tourism practices, particularly relevant in cities affected by overtourism and marine pollution.
- The **FAO–General Fisheries Commission for the Mediterranean (GFCM)** supports sustainable small-scale fisheries, a key foundation for pescaturism and community-based coastal tourism. Through policy guidance and pilot initiatives, it fosters synergies between conservation, cultural heritage, and sustainable food systems.
- The **European Environment Agency (EEA)** plays a key role in supporting evidence-based tourism governance by providing high-quality environmental data and assessments across Europe. Its work on coastal and marine pressures, land use, water quality, and climate impacts informs strategic planning and policy development in tourism-intensive regions. EEA indicators are widely used to monitor progress toward EU and regional sustainability goals, including those related to tourism and the blue economy.
- The **Copernicus Marine Environment Monitoring Service (CMEMS)** provides real-time and forecasted oceanographic data, such as sea surface temperature, sea-level trends, and pollution dispersion, critical to coastal risk management and destination resilience. This information enables tourism authorities and operators to plan for climate adaptation, marine safety, and ecosystem-based management in tourism hotspots. CMEMS is particularly relevant for small islands and low-lying coastal areas vulnerable to climate change.
- The **Intergovernmental Oceanographic Commission of UNESCO (UNESCO-IOC)** coordinates international cooperation in ocean science, observations, and services. In the Mediterranean, it supports maritime spatial planning, ecosystem monitoring, and capacity development, critical elements for informed decision-making and integration of marine data into tourism governance. Its platforms contribute to both national and transboundary marine management strategies.

#### 4.1.6 Small and Medium Enterprises (SMEs)

Small and Medium Enterprises (SMEs) form the backbone of the tourism economy in the Mediterranean. From small hotels, guesthouses, and family-run restaurants to tour operators, artisanal producers, dive schools, and fishing cooperatives, these enterprises deliver most of the region's tourism services and shape the daily visitor experience. Their close ties to local communities and ecosystems make them essential actors in the transition toward more sustainable and inclusive blue tourism.

Despite their critical role, SMEs often face structural limitations, such as reduced access to finance, limited technical capacity, or seasonal employment patterns, which can limit their ability to implement sustainability measures independently. For this reason, they often rely on intermediary structures for coordination, capacity-building, and visibility. Chambers of commerce, tourism business associations, cooperatives, and local tourism clusters frequently serve as platforms through which SMEs can collectively engage with public authorities, access funding, and adopt responsible practices. In some destinations, Destination Management Organisations (DMOs) also play a coordinating role for SMEs, facilitating joint promotion, product development, and participation in decision-making processes.

The aggregation of SME voices through these business forums not only enhances policy coherence and responsiveness but also strengthens the representation of local economic interests in regional and national tourism governance. This has direct implications for future policy pathways, particularly in ensuring that Mediterranean blue tourism strategies remain grounded in the realities, needs, and capacities of the small-scale actors who bring destinations to life.

## 4.2. Recent Sustainable Blue Tourism Initiatives

In recent decades, the tourism sector has increasingly launched initiatives aimed at improving governance and enhancing destination and business practices. Across Europe, and particularly in the Mediterranean, these efforts have focused on promoting inclusive tourism, environmentally sustainable practices and the adoption of codes, pledges and declarations that support responsible tourism development.<sup>6</sup>

**Table 5** provides a selection of key Mediterranean initiatives promoting sustainable blue tourism. While not exhaustive, it highlights influential networks and programmes that shape governance, build capacity, and foster regional cooperation.



Table 5. Mediterranean Sustainable Tourism Initiatives

Name	Year	Objectives
Mediterranean Marine Protected Areas Network (MedPAN)	1990	<b>MedPAN</b> actively promotes sustainable tourism within Marine Protected Areas (MPAs) across the Mediterranean. It collaborates with MPA managers, local communities, and international partners to ensure tourism supports conservation goals while benefiting local economies. MedPAN's approach includes: capacity-building and knowledge sharing; strategic partnerships—notably with <b>MEET Network</b> ; community engagement through ecotourism projects that promote cultural heritage and environmental stewardship; and Policy contributions, supporting regional guidelines for sustainable tourism
Network of Sustainable Tourism Observatories (NSTO)	2020	The <b>NSTO</b> is a collaborative initiative under the Interreg Euro-MED Programme, designed to enhance data-driven governance and foster sustainable tourism practices across the Mediterranean region. Since its inception, the NSTO has evolved into a dynamic network encompassing 40 institutional members, including public authorities, academic institutions, NGOs, and private sector stakeholders. The network serves as a platform for sharing data management strategies, best practices, and innovative tools, harmonising approaches to sustainable tourism across the Mediterranean.
Network of European Regions for Competitive and Sustainable Tourism (NECSTouR)	2007	<b>NECSTouR</b> is an association that unites over 40 regional tourism authorities and more than 30 associated members, including universities, research institutes, tourism enterprises, and sustainable tourism associations across Europe. It serves as a collaborative platform to address tourism challenges by identifying, capturing, and sharing best practices among its members and key partners. Through interregional cooperation, the network aims to foster a smarter, more sustainable approach to tourism development. Its strategic roadmap, the NECSTouR 2030 Pathway <sup>111</sup> , guides members towards a more sustainable and resilient tourism industry by empowering them to actively engage with destinations across Europe, fostering collaboration, and driving meaningful progress.
Sustainable Tourism Mission of the Interreg Euro-MED	2023	The <b>Sustainable Tourism Mission</b> builds on the legacy of the Sustainable Tourism Community from the Interreg MED Programme 2014-2020. It emphasises circular tourism, ecosystem service sustainability, innovative technologies, and the preservation of natural resources and cultural heritage. The Sustainable Tourism Mission works to promote circular economy principles in tourism, integrate environmental sustainability into tourism governance and enhance regional cooperation on sustainable tourism policy. The programme has a sister initiative, Interreg NEXT MED, which functions as a larger, expanded framework covering additional non-EU partner countries, thereby creating a broader Mediterranean cooperation area.
WestMED Initiative		<p>The <b>WestMED Initiative</b> supports sustainable coastal and marine tourism in the Western Mediterranean, following up on the Blue Economy Ministerial Declaration.<sup>112</sup> It emerged from the “5+5 Dialogue” between five EU countries (France, Italy, Portugal, Spain and Malta) and five Southern partner countries (Algeria, Libya, Mauritania, Morocco and Tunisia).</p> <p>Within this framework, the WestMED Technical Group on Sustainable Tourism plays a key role in fostering regional cooperation and aligning tourism development with sustainability principles. It brings together representatives from the public and private sectors, civil society, and international organisations to facilitate knowledge exchange, promote best practices, and support the implementation of sustainable tourism initiatives across the western Mediterranean. The group acts as a platform for policy dialogue and technical support, contributing to the operationalisation of the Ministerial priorities, particularly those related to ecotourism, blue jobs, and coastal resilience.</p>
EU Blue Economy Observatory	2020	The <b>EU Blue Economy Observatory</b> monitors coastal and maritime sectors, identifying tourism as a major contributor to economic output and employment. It provides critical insights to support sustainable policy development across blue economy sectors.
Mediterranean Observatory on Environment and Sustainable Development	2020	Managed by Plan Bleu under the UNEP/MAP Barcelona Convention, the <b>Regional Observatory on Environment and Sustainable Development</b> connects tourism with broader sustainability goals. It supplies data, indicators, and strategic analyses to help guide decision makers in aligning tourism with environmental and development priorities.
Blue Tourism Flagship Initiative in the Mediterranean	2023	Within the Mediterranean Strategy for Sustainable Development, the Flagship Initiative on Blue Tourism promotes policies that balance economic growth with environmental responsibility. Key activities include engaging youth and stakeholders across public and private sectors, strengthening cooperation among regional actors to advance blue tourism and environmental governance, and piloting sustainable tourism projects in Mediterranean countries.

## 4.3 Regional and International Governance Frameworks

### 4.3.1 Sustainable Tourism Governance

Sustainable tourism governance in the Mediterranean context is defined as: “A coordinated, multi-level process involving collaboration between public, private and social actors within and beyond the tourism system”. It aims to create policy synergies and build capacity for achieving shared goals, developing strategic joint projects, fostering sustainability and managing complexity, and achieving balance between the welfare of residents and tourists, destination competitiveness and the context-specific needs of natural, built and cultural environments.<sup>113</sup>

Effective governance is essential for responsible tourism but remains challenging due to the tourism’s cross-cutting nature and the need to address the entire value chain. Strong coordination and effective engagement among stakeholders at both local and regional levels are crucial to coordinate policies on socio-cultural, environmental and economic development of the tourism sector.<sup>7</sup>

#### BOX 3. GOVERNANCE ALIGNMENT IN SUSTAINABLE TOURISM: LESSONS FROM THE BALEARIC ISLANDS AND VENICE

A good practice example is the law on urgent measures for sustainable and circular tourism in the Balearic islands,<sup>57</sup> adopted in 2022 and co-developed by the regional government, island councils, municipalities, businesses, trade unions, and EU-funded programmes. The law incorporates visitor management tools such as tourist bed moratoria, eco-regulations (e.g. mandatory water-saving fixtures and waste reduction), and a sustainability tax investment framework.<sup>73</sup> These measures were shaped through stakeholder working groups—including local authorities, tourism agencies, NGOs, and sector representatives—ensuring coordinated input from municipal to EU levels, which enabled aligned policies across governance layers, combining environmental protection, economic concerns, and social inclusion. In contrast, Venice’s cruise congestion illustrates the risks of governance misalignment: fragmented authority between port authorities, city officials, and regional governments delayed decisive action, exacerbating environmental damage and social conflicts. These cases highlight that, without clear, multi-level coordination, sustainable tourism goals are difficult to achieve, risking economic, social, and environmental well-being.

In 2021, the European Commission launched a Transition Pathway for Tourism<sup>114</sup>, co-developed with stakeholders from across the tourism ecosystem. It outlines key actions, targets, and conditions to support the green and digital transitions and achieve the sector’s long-term resilience. Key priorities include:

- Investing in circularity to reduce energy use, waste, water consumption, and pollution, while responding to the growing demand for sustainable tourism;
- improving data sharing to enable innovation and better destination management:
  - Developing skills to ensure a well-trained workforce and attractive tourism careers.

Ultimately, sustainable tourism governance must balance capable environmental integrity, economic viability and socio-cultural wellbeing through coordinated strategic planning, consensus-building, and pragmatic, long-term solutions.<sup>113</sup>

### 4.3.2 UNEP/MAP and the Barcelona Convention

#### 4.3.2.1 Overview of the Barcelona Convention

Launched in 1974, the United Nations Environment Programme’s (UNEP) Regional Seas Programme promotes the protection and sustainable use of the world’s coastal and marine resources.<sup>115</sup> Under this framework, the Mediterranean Action Plan (UNEP/MAP) was established in 1975 as the first regional action plan.<sup>116</sup>

UNEP/MAP played a key role in the adoption of the Barcelona Convention for the Protection of the Marine Environment and the Coastal Region of the Mediterranean and its Protocols, a cornerstone legal framework for environmental governance in the region. Originally adopted in 1976 and updated in 2004, the Convention and its seven protocols form the main legally binding Multilateral Environmental Agreement (MEA) in the Mediterranean. The Convention includes obligations and standards for activities such as pollution prevention, biodiversity conservation, and sustainable development of marine and coastal areas.

All 21 Mediterranean countries and the European Union are contracting parties to the Convention. They commit to preventing, reducing, and, where possible, eliminating marine pollution, while promoting sustainable development. This directly supports the blue economy and, by extension, blue tourism.<sup>116</sup>

#### 4.3.2.2 Key Protocols and Strategic Tools

The Barcelona Convention is supported by a series of protocols and strategic instruments that operationalise its objectives.<sup>117</sup>

- **Protocol on Integrated Coastal Zone Management (ICZM):** Promotes a holistic approach to coastal planning and management, covering the full cycle from data collection to implementation and monitoring. It aims to balance environmental, economic, social, cultural, and recreational objectives.<sup>118</sup> Article 9 specifically outlines obligations for maritime economic activities to ensure the sustainable development of the blue economy.
- **Regional Plan for Marine Litter Management (RPML):** Addresses pollution from both land- and sea-based sources, aligned with the Land-Based Sources Protocol. It seeks to reduce litter and promote circular economy practices to improve coastal and marine environmental quality.
- **Protocol concerning Specially Protected Areas and Biological Diversity in the Mediterranean (SPA/BD Protocol):** Provides the legal basis for protecting biodiversity. It underpins the creation of Specially Protected Areas of Mediterranean Importance (SPAMIs), including emblematic sites like the Medes Islands (Spain), Pelagos Sanctuary (France, Italy, Monaco), Tyre Coast Nature Reserve (Lebanon), and Kneiss Islands (Tunisia). These sites offer opportunities for nature-based tourism such as diving, wildlife observation, and environmental education.

#### 4.3.2.3 Implementation and Impact in the Mediterranean

Mediterranean administrations apply various strategies, action plans, and tools derived from the Convention to foster the sustainable development of coastal and maritime areas.

A central instrument is the [Mediterranean Strategy for Sustainable Development \(MSSD\) 2016-2025](#), which provides a regional framework aligned with the UN 2030 Agenda and the SDGs. As the current strategy approaches its final horizon, a revision process is underway to update its priorities and ensure continued alignment with emerging challenges and global frameworks, including the green and blue transitions. Its strategic objectives include: promoting stakeholder collaboration at all levels to ensure the sustainable development of marine and coastal areas (Goal 1), and supporting the transition to a green and blue economy (Goal 5).<sup>119</sup>

The implementation and tracking of the MSSD are supported by the Plan Bleu Regional Activity Centre, which functions under the UNEP/MAP system. Plan Bleu produces strategic analyses, environmental foresight studies, and sustainability assessments that help inform regional policy-making. It also coordinates the Mediterranean Observatory on Environment and Sustainable Development, which provides indicators and data to monitor tourism's environmental performance and its alignment with SDG targets.

The Convention's influence continues to grow. At the 23rd Meeting of the Contracting Parties (COP 23) in 2023, ministers endorsed a declaration for a "green transition in the Mediterranean region: from decisions to actions". Key commitments included: reducing land-based pollution, decarbonising blue economy sectors, developing science-based policies, modernising education systems, and promoting intergenerational environmental dialogue.

### 4.4. Blue Tourism and Marine Protected Areas

Marine Protected Areas (MPAs) play a vital role in supporting blue tourism in the Mediterranean. By mitigating environmental impacts and preserving ecological integrity, particularly in the increasingly stressed Mediterranean, MPAs enhance the appeal of coastal and marine destinations, directly or indirectly attracting 30% of global tourism to the region.<sup>8</sup> Designating an MPA often increases the site's visibility and attractiveness, creating opportunities for sustainable business models and nature-based tourism ventures that align conservation and recreation goals.

The Mediterranean hosts a diverse network of area-based protection mechanisms, encompassing both marine and adjacent terrestrial areas. MPAs are geographically defined zones with formal protection objectives, designed to safeguard biodiversity, maintain ecosystem health, and secure the flow of ecosystem services essential to tourism and fisheries alike.<sup>120</sup> Other forms of marine protection in the region include Specially Protected Areas of Mediterranean Importance (SPAMIs), Natura 2000 marine sites, Critical Cetacean Habitats (CCH), and Ecologically and Biologically Significant Areas (EBSAs), many of which are designated by intergovernmental organisations.

Other Area-based conservation tools include Other Effective area-based Conservation Measures (OECMs).<sup>121</sup> These are not formally designated as protected areas but still contribute

to long-term biodiversity conservation and ecosystem service delivery. In the Mediterranean, OECMs may include traditional fishery zones, sacred coastal sites, or military exclusion areas that maintain ecological value. As such, they offer untapped potential for low-impact, locally managed tourism experiences while reinforcing ecological resilience.

On land, many coastal tourism hotspots also overlap with protected terrestrial areas such as national parks, UNESCO World Heritage Sites, Ramsar wetlands, and Natura 2000 terrestrial sites. Regional designations like France's Regional Nature Parks (e.g. the Camargue) offer further examples of integrated land-sea conservation frameworks relevant to sustainable tourism. While international bodies often grant designation status, day-to-day management is typically the responsibility of national or local authorities, making local governance capacity and stakeholder engagement critical to effective tourism planning.

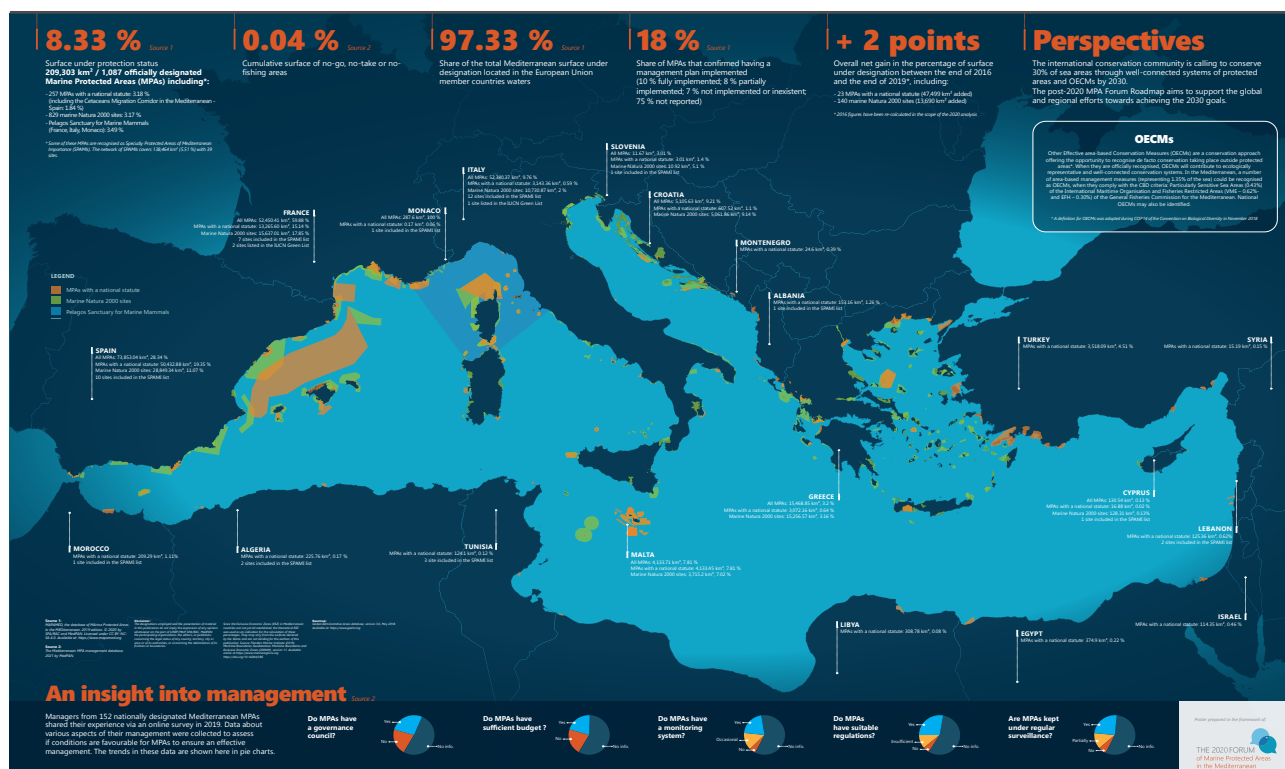
As of 2020, according to MedPAN, 8.33% of the Mediterranean Sea was under official protected status ([Figure 15](#)), with 97.33% of that area lying within EU Member State waters.<sup>122</sup> However, the effectiveness of these MPAs remains a concern: according to Protected Planet, of the 176,540 European MPAs, only 14,556 have been assessed for management effectiveness<sup>123</sup>, a key gap in ensuring that tourism is both sustainable and conservation-compatible.



Old port of Marseille, France ©MEET Network/Rossella Ongaretto



**Figure 15. The System of Mediterranean Marine Protected Areas**



Source: MedPAN, 2020<sup>122</sup>

#### BOX 4. GREEN LIST: A GLOBAL BENCHMARK FOR PROTECTED AREA MANAGEMENT

The IUCN Green List of Protected and Conserved Areas is a global standard and certification programme<sup>124</sup> that promotes excellence in protected area management. It offers a rigorous, transparent framework for evaluating how well an area is governed, managed, and achieving conservation outcomes. Sites that meet the Green List Standard must demonstrate:

- Good governance, including inclusive and equitable stakeholder engagement
- Sound design and planning, based on ecological and social values
- Effective management, including clear goals, sufficient capacity, and adaptive processes
- Positive conservation results, showing that biodiversity and ecosystem services are being maintained or restored

The project **GreenList4MMPAs** is developing guidance on how to apply the global standard to the Mediterranean's marine context. This will represent an actionable, locally relevant and globally recognised tool to promote the effectiveness, equitability and success of the region's MPAs.

By adopting the Green List Standard, Mediterranean sites can improve management effectiveness, support sustainable tourism models, and contribute to global conservation targets such as 30x30.

Together, these actors, frameworks and initiatives form the backbone of sustainable blue tourism governance in the Mediterranean. Their collaborative efforts are crucial to ensuring that tourism not only drives economic growth, but also safeguards marine and coastal ecosystems, promotes cultural heritage, and enhances community resilience.



Charfia fishing in the Kerkennah Islands, Tunisia ©Mubadarat/IUCN

## 5. Policy Pathways for Resilient Blue Tourism in the Mediterranean—Inroads Toward a Regenerative Blue Economy?

Amid growing environmental and social challenges, blue tourism in the Mediterranean must evolve from strategies that simply reduce negative impacts to those that proactively build resilience and promote environmental renewal. This strategic agenda is anchored in two complementary principles:

1. **Resilience**, understood as the capacity of destinations and ecosystems to anticipate, absorb, and recover from climatic, ecological, and socio-economic disruptions.

2. **Regeneration**, seen here as the process of restoring marine and coastal ecosystems and enabling tourism models that enhance biodiversity, support community well-being, and align with climate priorities.

While “regeneration” can carry multiple interpretations, its use in this context emphasises practical steps to repair ecological systems and foster more inclusive, nature-aligned economic models. A Regenerative Blue Economy goes beyond sustainability by actively restoring marine and coastal ecosystems, strengthening community resilience, and creating long-term socio-ecological value. It recognises that healthy ecosystems are the foundation for thriving economies and seeks to embed environmental renewal, equity, and resilience at the core of tourism development. This means shifting from extractive, high-impact tourism models to those that regenerate natural capital, empower local communities, and build circular, low-carbon economies in coastal areas. As described in the IUCN report *Towards a Regenerative Blue Economy*,<sup>125</sup> regenerative tourism is “nature-positive, people-centred, and climate-resilient,” calling for a shift away from extractive practices toward those that restore ecosystems and livelihoods.

This vision complements the UNEP/MAP Mediterranean Strategy for Sustainable Development (MSSD 2016–2025 and the upcoming MSSD 2026–2035), which promotes an inclusive transition to a green and blue economy, integrating climate adaptation, sustainable consumption, and ecosystem restoration. It is also aligned with the EU Mission ‘Restore our Oceans and Waters’<sup>126</sup> and its Goal 2 (prevent and eliminate pollution) and Goal 3 (make the sustainable blue economy carbon-neutral and circular), as well as the WestMED Malta Ministerial Declaration (2023)<sup>127</sup> to strengthen the competitiveness and sustainability of the coastal and maritime tourism sector, as part of a smart and resilient blue economy’. The Union for the Mediterranean’s *Roadmap to set the path towards the implementation of the 2021 UfM Ministerial Declaration on Sustainable Blue Economy*,<sup>109</sup> further reinforces the need for investment in nature-based infrastructure, policy alignment, and regional integration. These principles are reflected in the Blue Tourism Flagship Initiative under the MSSD and provide a shared framework for South-South cooperation and knowledge exchange across emerging marine tourism regions.

These policy pathways are intended as a resource for decision-makers across multiple governance levels: national and subnational authorities, regional cooperation bodies, donor agencies, protected area managers, and

destination-level tourism stakeholders. They aim to inform not only policymakers but also practitioners involved in sustainable tourism planning, investment, and regulation, particularly in coastal and marine contexts.

The policy pathways outlined in this chapter are proposed directions to advance resilient and regenerative blue tourism in the Mediterranean. While they draw from regional policy frameworks, their effective implementation will require further operationalisation through the development of clear, context-specific indicators to guide monitoring, evaluation, and adaptive management. However, the definition of such indicators lies beyond the scope of this publication. To reinforce the relevance and feasibility of these pathways, many are accompanied by practical experiences and illustrative examples, which are embedded within the report and supporting materials. These real-life case studies not only substantiate the proposed approaches but also offer inspiration and guidance for policy alignment and on-the-ground action across the region.

### Overview of the Policy Pathways

The seven policy pathways presented below are structured across two complementary pillars. Thematic pathways address the core sustainability and vulnerability challenges faced by blue tourism in the Mediterranean, particularly those linked to climate change, ecological degradation, infrastructure development, and product transformation. Although no explicit pathway is outlined for the social dimensions and challenges of blue tourism, the proposed strategies are intended to play a significant role in advancing socially just tourism transitions. Enabling pathways, on the other hand, establish the governance, financial and knowledge systems required to implement and scale the thematic responses effectively.

The seven policy pathways outlined above and detailed below are grounded in the urgent need to align Mediterranean tourism development with environmental, economic, and social sustainability goals. They reflect the region’s climate and biodiversity fragility, and support long-term destination viability by reducing vulnerability, strengthening governance, and fostering innovation.

By embedding Nature-based Solutions, circular economy principles, and inclusive economic models, these pathways offer a structured response to the mounting pressures on Mediterranean coasts, while also contributing to regional resilience, equity, and sustainability.

PILLAR	POLICY PATHWAY	FOCUS AREA / OBJECTIVE
I. THEMATIC PATHWAYS	1. Climate Change Adaptation and Resilience	Enhance the adaptive capacity of tourism systems through mitigation, ecosystem restoration, and climate-resilient planning.
	2. Managing Mass Tourism to Relieve Pressures	Regulate infrastructure and marine recreation to ease environmental impacts and improve coastal resilience.
	3. Sustainable Products and Destination Stewardship	Shift to low-impact, community-driven, nature-based tourism products aligned with circular economy and sustainable destination management.
II. ENABLING PATHWAYS	4. Governance and Strategic Integration	Ensure cross-sectoral and multi-level policy alignment with EU and regional frameworks like the Barcelona Convention and the MSSD.
	5. Research and Innovation	Create science-policy-practice interfaces through data platforms, observatories, and regional innovation ecosystems.
	6. Knowledge Sharing and Capacity-Building	Promote trans-regional cooperation, peer learning, and inclusive training involving public, private, and community actors.
	7. Sustainable Finance and Investment	Align and mobilise public, private, and blended finance to support sustainable and climate-aligned tourism transitions.



Tourism guide in the Kerkennah Islands ©Mubadarat/IUCN





# 1. CLIMATE CHANGE ADAPTATION AND RESILIENCE BUILDING

## CHALLENGE ADDRESSED

Blue tourism assets—coastal infrastructure, ports, beaches, and nature-based attractions—are increasingly vulnerable to rising sea levels, extreme heat, water scarcity, marine heatwaves, and storm surge flooding. Despite this, most Mediterranean destinations lack localised risk assessments and tourism-specific adaptation strategies. These deficits are particularly pronounced in North Africa and the Levant, where technical capacity and institutional support remain limited, jeopardising long-term viability.

## ACTORS INVOLVED

National and local governments, civil protection and disaster management agencies, regional climate science networks (e.g. MedECC), ministries of tourism, environment and sustainable development, port authorities, national fisheries offices, regional and local development agencies, destination management organisations (DMOs), NGOs, marine protected areas (MPAs) managers, international donors and organisations (e.g. Plan Bleu Regional Activity Centre (UNEP/MAP), Union for the Mediterranean, NECSTouR Climate Hub, CPMR Intermediterranean Commission, FAO, MedCities), local and regional research institutions, universities, tech platforms, insurance companies, relevant representatives of the private sector (ports, hotels), climate finance stakeholders.

## NARRATIVE

This pathway prioritises the mainstreaming of climate adaptation into the planning, development, and regulation of blue tourism. Adaptation must also function as disaster risk reduction, protecting destinations from sea-level rise, storm surges, heatwaves, and water scarcity. Building resilience

means not only reducing risk but also maintaining the safety, competitiveness and appeal of Mediterranean. Localised vulnerability assessments, participatory planning, and infrastructure upgrades must accelerate across the region. Climate models, adaptation plans, local research, and regenerative strategies provide a shared basis for coordinated action.

## POLICY ACTIONS

### 1.1. Climate Risk Assessments and Action Plans:

Establish national and local-scale vulnerability diagnostics for blue tourism zones, using MedECC indicators. Create climate adaptation plans integrating hazard exposure, socio-economic vulnerability, and resilience capacity, raising awareness among coastal communities and local tourism stakeholders. Provide funding and training through regional adaptation hubs targeting destinations with limited capacity. Link these to land-use, tourism zoning, and civil protection protocols, such as through adaptation or integration of Integrated Coastal Zone Management (ICZM) systems.

### 1.2. Climate-Resilient Tourism Planning and Behaviour Change:

Encourage shifts in tourism demand and destination planning that reduce climate risk exposure and dependency on carbon-intensive travel. Promote local and regional tourism alternatives to minimise reliance on long-haul flights and support the resilience of domestic and short-haul markets during climate-related disruptions. Integrate destination-level environmental and carbon footprint assessments into planning processes to identify hotspots and inform adaptation strategies. Incentivise operators and tourists to adopt low-impact behaviours—such as sustainable mobility choices, itinerary optimisation, and resource-conscious practices.

### 1.3. Decarbonisation & Circular Economy Integration:

Promote low-emission mobility (e.g., electrified transport, shore power for ports), retrofitting of hotel and resort infrastructure, and closed-loop systems in supply chains. Align with the Glasgow Declaration, the EU Mission ‘Restore our Oceans and Waters’, the EU Industrial Strategy, the Energy Transition Partnership for EU Fisheries and Aquaculture, and national climate targets.

### 1.4. Integrated Water & Energy Transitions:

Support the roll-out of destination-level water strategies that combine greywater recycling

and demand-side efficiency. Promote renewable energy use across tourism value chains, including solar energy for marinas and hospitality.

### 1.5. Nature-based Solutions (NbS):

Mainstream NbS for disaster risk reduction, flood protection, erosion control, and heat reduction. Priority interventions include conserving and restoring Posidonia meadows, coastal wetlands, and sand dunes, and evaluating blue carbon potential. Create policy incentives for private investments in restoration, and highlight cost-benefit results from NbS pilot projects to support uptake. Ensure NbS are embedded in tourism development plans and adaptation funding streams.

**1.6. Culture-based solutions:** Leverage cultural heritage for climate adaptation by promoting traditional climate-resilient practices, such as vernacular architecture, seasonal land use, and water-saving techniques, in tourism development. Support community-led initiatives that preserve and apply local knowledge for managing environmental risks. Integrate culture-based approaches into local adaptation plans.

### 1.7. Participatory adaptation planning:

Create formal, recurring forums that bring together tourism operators, local communities, policy-makers, managers, and scientists to collaboratively identify climate risks, share knowledge, and co-design adaptive strategies. These forums should be institutionalised at regional and destination levels and linked to broader governance platforms to enhance policy coherence and implementation support.

## SUPPORTING REFERENCES AND EXAMPLES

MedECC Summary for Policymakers (2024)<sup>128</sup>, sections on heatwaves, droughts, sea-level rise, and ecosystem risks.

MedECC MAR1 (2020)<sup>66</sup>, Chapters 4 & 6: marine biodiversity, climate vulnerability.

UNEP/MAP Ecosystem Approach Roadmap and ICZM Protocol.<sup>117, 129</sup>

IPCC (2022), Climate Change 2022: Impacts, Adaptation and Vulnerability Mediterranean Cross-Chapter.<sup>96</sup>

IUCN (2024) Regenerative Blue Economy Report – NbS chapter.<sup>125</sup>

IUCN (2025) Mediterranean blue carbon strategy.<sup>131</sup>

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UNWTO (2021) Glasgow Declaration on

Climate Action in Tourism.<sup>104</sup>

Energy Transition Partnership for EU  
Fisheries and Aquaculture.<sup>132</sup>

EIB and IRENA (2015) Evaluating  
Renewable Energy Manufacturing  
Potential in the Mediterranean Partner  
Countries.<sup>133</sup>

UNDRR (2024) Nature-based solutions  
for comprehensive disaster and climate  
risk management Toolkit.<sup>134</sup>

EU Industrial Strategy.<sup>135</sup>

EU Nature Restoration Regulation.<sup>136</sup>

Mediterranean Blue Carbon Initiative.<sup>137</sup>

The Travel Foundation (2023)

Envisioning Tourism 2030 and  
Beyond.<sup>138</sup>

Community4Tourism Interreg Euro-MED  
project's Blueprint for Tourism Climate  
Action Plans.<sup>139</sup>

NaTour4CChange Interreg Euro-MED  
project's Climate Action Planning  
Toolkit.<sup>140</sup>

MEET Network ecological footprint  
calculator.<sup>141</sup>

DNV (2023) Pathway to Net Zero  
Emissions.<sup>142</sup>



Underwater life ©Mubadarat/IUCN





## 2. MANAGING MASS TOURISM TO RELIEVE COASTAL PRESSURES

### CHALLENGE ADDRESSED

Mass tourism infrastructure—hotels, ports, marinas, cruise terminals—is concentrated in vulnerable coastal zones, exacerbating erosion, habitat degradation, and pollution. Rapid and poorly planned development increases land-use conflicts and undermines long-term sustainability. Destinations in early expansion (e.g., Albania, Morocco, Montenegro) risk repeating unsustainable patterns.

### ACTORS INVOLVED

Urban planning departments, tourism investment agencies, ministries of infrastructure, transport and tourism, cruise companies, marina operators, port authorities, regions and municipalities, NGOs, spatial planners, Chambers of Commerce, MPA managers, hotel associations, EU Commissioner for the Mediterranean

### NARRATIVE

This pathway focuses on regulating intensive tourism activities, infrastructure, and growth in coastal and marine zones to ensure resilience and long-term viability. Strategic planning, carrying-capacity tools, the ICZM protocol and cross-sector coordination are key to managing pressures from infrastructure, marine activities, and seasonal surges. Effective visitor management systems and environmental regulation in the hotel, cruise, and yachting sectors are critical.

### POLICY ACTIONS

**2.1. Spatial Regulation of Coastal Development:** Enforce ecological thresholds, land-use zoning, climate-risk zoning for vulnerable coasts, and development moratoria in erosion-prone or saturated destinations. Support ICZM-based spatial planning

and climate-resilient infrastructure codes. Develop a Mediterranean typology of saturation zones based on measurable criteria such as infrastructure density and erosion rates to guide policy thresholds.

**2.2. Cruise Sector Management:** Introduce basin-level sustainability standards for cruise operations, aligned with both European legislation and IMO frameworks, covering emissions, port waste, and berth limits in sensitive areas. Promote a Mediterranean Cruise Sustainability Accord to establish minimum environmental and social standards for ports of call. Ensure coordination through existing platforms to enable joint implementation, knowledge exchange, and compliance oversight across ports.

**2.3. Yachting and Marine Recreation Standards:** Develop anchoring regulations to protect seagrass and benthic ecosystems. Create regional codes for mooring, fuel management, and activity zoning within MPAs and in other sensitive areas.

**2.4. Visitor Flow Management:** Deploy digital monitoring systems and reservation tools for high-impact sites (e.g., beaches, MPAs, heritage towns). Include cost estimates and reference funding opportunities to support municipalities in adopting these technologies. Incorporate open data approaches to better manage tourism flows. Standardise carrying capacity assessments and integrate carrying capacity thresholds at the destination level into tourism policies.

**2.5. Marine Activities and Wildlife Watching:** Establish and enforce science-based codes of conduct for marine wildlife tourism. Regulate vessel proximity, noise, and feeding to minimise ecological stress. Strengthen awareness campaigns to encourage the adoption of responsible behaviours.

**2.6. Pollution Management:** Enforce restrictions on single-use plastics and promote reusable alternatives in high-tourism areas. Enhance waste collection and recycling systems to manage peak-season surges. Integrate pollution reduction into destination planning and run awareness campaigns. Coordinate regionally to monitor pollution and support circular economy practices.

**2.7. Sustainable Hotel Development Regulation:** Define strict environmental guidelines for hotel construction in coastal and marine areas that account for coastal erosion risk, biodiversity loss, and infrastructure stress. Enforce zoning restrictions and architectural codes that align with climate adaptation and low-impact design principles.

Limit new hotel permits in saturated or ecologically vulnerable zones, and require destination-level water audits before authorising additional bed capacity.

### 2.8. Blue Tourism Certification

**Standards:** Develop and promote a unified regional certification or eco-label specifically for blue tourism, targeting marine and coastal tourism operators, accommodations, and destinations. Criteria should encompass marine biodiversity protection, climate resilience, low-impact infrastructure, community benefits, and cultural respect. To ensure these certification mechanisms deliver meaningful change, strengthen their design for greater and more visible impact—through robust third-party auditing, clear performance thresholds, public transparency of certification status, and periodic reassessment tied to tangible improvements in sustainability outcomes.

### SUPPORTING REFERENCES AND EXAMPLES

BTI (2025) Policy Pathways Towards a More Sustainable Cruise Tourism Sector (2025).<sup>33</sup>

BTI Mapping the Impact of Blue Tourism (2024).<sup>8</sup>

MedECC MAR1 (2020)<sup>66</sup>, coastal urbanisation and erosion chapters.

Community4Tourism Interreg Euro-MED project's Practices Handbook on Unpacking the Potential of ICZM & MSP processes for Sustainable Tourism in the Mediterranean.<sup>143</sup>

UNEP/MAP ICZM Protocol.<sup>117</sup>

UNEP/MAP Regional Plan on Marine Litter Management in the Mediterranean.<sup>144</sup>

IUCN (2024) Regenerative Blue Economy – Chapter on Yachting.<sup>125</sup>

CPMR and MedWaves (2022) A Circular Blue Economy for the Mediterranean.<sup>145</sup>

The Travel Foundation (2019) The Invisible Burden of Tourism.<sup>146</sup>

Plan Bleu (2022) Guidelines for the Sustainability of Cruises and Recreational Boating in the Mediterranean Region.<sup>147</sup>

Local and regional climate adaptation and mitigation plans

Global Sustainable Tourism Initiative<sup>148</sup> and Global Tourism Plastics Initiative.<sup>149</sup>

GSTC Standards.<sup>150</sup>





### 3. SUSTAINABLE PRODUCTS AND DESTINATION STEWARDSHIP

#### CHALLENGE ADDRESSED

Tourism in the Mediterranean is dominated by mass-market offerings that generate high environmental costs and deliver limited local value. Ecotourism, pescaturism, and community-based models remain underdeveloped despite their potential to foster inclusive, low-impact growth. Destination Management Organisations (DMOs) often lack the mandate, capacity, or incentives to lead the shift towards sustainability.

#### ACTORS INVOLVED

Destination Management Organisations (DMOs), local tourism SMEs, cooperatives, marketing agencies, regional branding platforms, ministries of culture, rural development and tourism, local authorities, tourism associations, NGOs, Chambers of Commerce, local communities

#### NARRATIVE

This pathway supports the diversification of blue tourism through products that are ecologically sustainable, culturally rooted, and economically inclusive. It emphasises a governance shift where DMOs are empowered as destination stewards and supported to co-create sustainability strategies with communities. Promotion strategies should reflect regenerative values and help redistribute and diversify flows across seasons and geographies, while minimising environmental costs of travel to destinations.

#### POLICY ACTIONS

- 3.1. DMO Transformation into Destination Stewards:** Reform the mandates of DMOs to lead on sustainability, local engagement, and monitoring. Address structural barriers by promoting inclusive governance and stable financing. Support capacity-building programmes and integrate DMOs into territorial governance platforms.
- 3.2. Climate-Aligned Marketing & Promotion:** Develop campaigns that target low-carbon, value-driven visitor profiles, including carbon-labelled packages, off-season incentives, and experiences tied to ecosystem restoration or cultural heritage. Reorient national and regional branding to reflect climate and sustainability goals.
- 3.3. Regenerative and Impact-Positive Tourism Models:** Design and fund strategies for ecotourism, pescaturism, marine cultural tourism, community-based tourism, and plastic-free destinations. Require certifications for tourism concessions in marine parks, MPAs, and heritage sites to align procurement and licensing with sustainability objectives.
- 3.4. Local Empowerment and Innovation:** Create incubation hubs and micro-finance channels for community enterprises and cooperatives. Ensure women, youth, and local communities can participate and benefit. Facilitate market access through digital tools and networks.
- 3.5. SME Support for Green Transition**

**and Sustainable Supply Chains:** Design and implement national schemes to support small and medium-sized enterprises (SMEs) in adopting greener practices across tourism-related supply chains, with a focus on sectors such as food services, marine excursions, transport, and community-based activities. Provide targeted training, technical assistance, and incentives to help SMEs improve environmental performance, reduce resource use, and align with recognised sustainability frameworks.

#### SUPPORTING REFERENCES

- IUCN (2024) Regenerative Blue Economy Report – Products & Livelihoods Section<sup>125</sup>
- BTI (2024) Community-based Tourism Policy Note.<sup>151</sup>
- EU Transition Pathway for Tourism (2022).<sup>114</sup>
- WTTC (2021) Towards Destination Stewardship
- Dialogue4Tourism Interreg Euro-MED project's White Paper on Sustainable Tourism Governance in the Euro-MED area.<sup>101</sup>
- CPMR and MedWaves (2022) A Circular Blue Economy for the Mediterranean.<sup>145</sup>
- UNWTO (2021) Glasgow Declaration on Climate Action in Tourism.<sup>104</sup>
- REGENERA4MED Interreg Euro-MED project.<sup>153</sup>



Mediterranean Beach ©Visitor/Dreamstime



## 4. GOVERNANCE AND STRATEGIC INTEGRATION

### CHALLENGE ADDRESSED

Tourism planning and development in the Mediterranean often occur in silos, disconnected from marine, biodiversity, and coastal management frameworks. Inter-ministerial coordination and coordination between different levels of governance are often challenging. There is limited coherence between national strategies and regional instruments such as the Barcelona Convention or MSSD, weakening implementation and oversight. Recent initiatives like the EU Ocean Pact reflect similar gaps, with tourism largely absent despite its coastal footprint. Particularly relevant to address is the concrete application at national level.

### ACTORS INVOLVED

National ministries of tourism, environment, and planning; Union for the Mediterranean (UfM); UNEP/MAP, Barcelona Convention and its Regional Activity Centres; local governments; NGOs; marine spatial planners; MPA managers; climate coordination units, NECSTour Governance Hub, CPMR Intermediterranean Commission Task Force on Sustainable Cultural & Maritime Tourism, WestMED Technical Group on Sustainable Tourism, MedCities

### NARRATIVE

This pathway focuses on mainstreaming sustainable tourism within broader policy frameworks and strengthening horizontal and vertical integration. It emphasises coherence with regional conventions, alignment with international sustainability goals, and differentiated strategies that address the realities of sub-regional Mediterranean contexts. Strengthening

governance also means involving local authorities and civil society more effectively in planning processes.

### POLICY ACTIONS

#### 4.1. Multi-level Governance Alignment:

Align national tourism development plans with the UNEP/MAP Ecosystem Approach, the Barcelona Convention, the EU Mission 'Restore our Oceans and Waters', the WestMED Malta Ministerial Declaration and UfM's Sustainable Blue Economy Roadmap. Establish focal points within national ministries to coordinate across sectors.

#### 4.2. Climate Policy Mainstreaming:

Integrate blue tourism sustainability measures into Nationally Determined Contributions (NDCs), national adaptation plans, and national climate finance strategies. Support countries in aligning tourism policies with the Glasgow Declaration and the future EU Sustainable Tourism Strategy.

#### 4.3. Maritime Spatial Planning (MSP) and Integrated Coastal Zone Management (ICZM) Integration:

Institutionalise tourism as a component of MSP and ICZM processes, ensuring spatial coherence and balance between conservation, public access, and tourism infrastructure.

#### 4.4. Marine Protected Areas (MPAs) and Target 3 Integration:

Embed tourism strategies in the management plans of MPAs and connect them to national biodiversity commitments (e.g., 30% protection by 2030 target).

#### 4.5. Context-Specific Policy Frameworks for National and Sub-Regional Implementation:

- Northern Mediterranean: Promote leadership in policy innovation, standard-setting, and public-private partnerships.
- Eastern Mediterranean: Strengthen institutional capacity, reduce fragmentation, and support peacebuilding through integrated planning.
- Southern Mediterranean: Prioritise adaptive governance for managing rapid tourism expansion, pollution control, water security, and management of fishery resources in connection with pescatourism.

#### 4.6. Administrative Coordination and Simplification at Destination Level:

Streamline overlapping administrative responsibilities related to coastal and tourism governance by creating unified destination-level coordination bodies. Develop simplified permitting processes and shared digital platforms to facilitate inter-agency communication, enhance policy coherence, and reduce regulatory burdens on compliant operators.

#### 4.7. Compliance Enforcement Mechanisms for Sustainable Tourism Governance:

Establish a regional compliance and enforcement instrument to ensure alignment with sustainability frameworks. Equip public authorities with adequate legal mandates, inspection tools, and sanctioning mechanisms to monitor tourism operations, address non-compliance, and uphold environmental and social standards across the tourism value chain.

### SUPPORTING REFERENCES AND EXAMPLES

UNEP/MAP MSSD (2016–2025).<sup>9</sup>

UfM Blue Economy Roadmap.<sup>109</sup>

Barcelona Convention ICZM & SPA/BD Protocols.<sup>117</sup>

UNEP/MAP Regional Plan on Marine Litter Management in the Mediterranean.<sup>144</sup>

Community4Tourism Interreg Euro-MED project's Practices Handbook on Unpacking the Potential of ICZM & MSP processes for Sustainable Tourism in the Mediterranean.<sup>143</sup>

IUCN (2024) Regenerative Blue Economy Report – Governance Chapter.<sup>125</sup>

UNWTO (2021) Glasgow Declaration on Climate Action in Tourism.<sup>145</sup>

Interreg MED Sustainable Tourism Governance Project.<sup>154</sup>

EU Maritime Spatial Planning Directive.<sup>155</sup>

Dialogue4Tourism Interreg Euro-MED project's White Paper on Sustainable Tourism Governance in the Euro-MED area.<sup>101</sup>





## 5. RESEARCH AND INNOVATION

### CHALLENGE ADDRESSED

Lack of (localised) data, monitoring systems, and cross-sectoral knowledge exchange constrain the capacity of Mediterranean destinations to design, implement, and evaluate sustainable blue tourism strategies. Many countries lack observatories or tools to track climate, biodiversity, and social, economic, and environmental impacts of tourism. Digital transformation, including smart tourism systems, integrated data platforms, and emerging AI applications, remains underutilised despite its potential to enhance real-time monitoring, predictive analysis, and evidence-based decision-making.

### ACTORS INVOLVED

National tourism and environment ministries and statistical offices, universities, research centres, international organisations (e.g., UNWTO, IUCN, UfM), regional observatories (e.g., NSTOs), donor agencies, NGOs, local innovation hubs, data managers, data analysts, and industry associations and platforms related to maritime, coastal, and sustainable tourism.

### NARRATIVE

This pathway seeks to build a robust science-policy-practice interface by expanding the research base, creating knowledge platforms, and fostering collaboration. It positions the Mediterranean as a regional knowledge hub for sustainable tourism. Strengthening indicators and monitoring is critical for policy coherence, destination management, and financing.

### POLICY ACTIONS

**5.1. Operationalise Sustainable Tourism Observatories:** Strengthen and expand the Network of Sustainable Tourism Observatories (NSTO) in the Mediterranean. Harmonise data collection and indicators across destinations, aligning with international goals and regional frameworks. Apply sustainability metrics (e.g. visitor flows, water use, biodiversity impact) alongside biodiversity-sensitive indicators such as species richness or seagrass health. Integrate these into national reporting systems and ensure observatories generate open-access data for local decision-making. As a foundation, establish minimum data baselines and commit to transparency.

**5.2. Collaborative Research Platforms:** Establish regional and national innovation alliances that unite academia, DMOs, NGOs, and the private sector to address regenerative tourism, climate resilience, and ecosystem-based planning.

**5.3. Sustainable Blue Tourism Metrics and Indicators:** Develop and adopt a set of harmonised blue tourism indicators and critical thresholds to evaluate regenerative impacts at destination level. These should measure key outcomes such as biodiversity health, carbon intensity, water use, and socio-economic benefits. Ensure these metrics are incorporated into tourism performance monitoring systems to guide adaptive management, investment decisions, and local planning priorities.

### 5.4. Technological Innovation Pilots:

Fund testbeds for regenerative business models and tech solutions (e.g., visitor flow management, smart mooring systems, data dashboards, eco-certifications). Encourage scalable approaches through public-private funding.

### 5.5. Private Sector Mobilisation for Innovation and Knowledge Generation:

Establish targeted incentives—such as tax benefits, innovation vouchers, and co-financing schemes—to encourage private tourism operators to invest in sustainable product innovation, data generation, and applied research. Promote public-private partnerships and integrate efforts into regional blue economy innovation platforms.

### SUPPORTING REFERENCES AND EXAMPLES

UN Tourism INSTO Framework.

Interreg Euro-MED NSTO Hub.<sup>156</sup>

BTI Caribbean Policy Notes (2023–2024).<sup>151</sup>

IUCN (2024) Regenerative Blue Economy Report – Innovation and Data Section.<sup>125</sup>

UfM Sustainable Tourism Expert Group Outputs

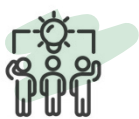
NECSTouR Tourism of Tomorrow Lab.<sup>157</sup>

MEET Network.<sup>44</sup>



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## 6. KNOWLEDGE SHARING AND CAPACITY BUILDING

### CHALLENGE ADDRESSED

Limited trans-regional cooperation, knowledge gaps between sectors, and uneven capacity across destinations to implement sustainable blue tourism practices.

### ACTORS INVOLVED

Local and regional governments, national tourism and environment ministries, private tourism operators, NGOs, marine scientists, community organisations, educational institutions, and regional bodies (e.g., UNEP/MAP, UfM, MedPAN, Plan Bleu).

### NARRATIVE

Effective Blue Tourism transitions require inclusive, cross-sector collaboration, shared knowledge, and strengthened capacities. Promoting joint learning across Mediterranean regions and stakeholder groups can enhance innovation, build trust, and accelerate the adoption of sustainable practices.

### POLICY ACTIONS

#### 6.1. Public-private-community partnerships for co-learning:

Establish or strengthen collaborative initiatives where governments, tourism businesses, and local communities jointly identify challenges, share knowledge, and co-develop solutions that align with sustainable and inclusive tourism goals.

**6.2. Joint training programmes and capacity-building workshops for tourism stakeholders:** Expand the offer of regionally coordinated training on sustainable tourism practices, marine conservation, and regulatory compliance, tailored to the needs of tour operators, destination managers, and local authorities.

**6.3. Trans-regional projects and exchanges under EU and Barcelona Convention frameworks:** Strengthen coordination and resource mobilisation for trans-regional blue tourism projects by embedding them within the implementation strategies. Such initiatives should promote harmonisation of policy instruments, co-financing of innovation pilots, and structured knowledge transfer between Mediterranean countries.

**6.4. Peer-to-peer learning among destinations through twinning and pilot initiatives:** Support the formalisation of destination twinning schemes and demonstration pilots through regional cooperation frameworks, enabling structured peer-to-peer exchanges. Pair destinations with differing capacities or experiences, particularly through strategic South-South twinning between leading

and emerging destinations, to foster practical learning, knowledge equity, and the replication of sustainable blue tourism models.

**6.5. South-South and Mediterranean Knowledge Transfer:** Establish a structured exchange facility to enable the transfer of policy and governance models between the Mediterranean and other marine tourism regions (e.g., the Caribbean, Indian Ocean, Coral Triangle) facilitating shared approaches to governance models, observatory frameworks, and nature-based product innovations. The mechanism should address common challenges, including maritime spatial planning, sustainable finance, and monitoring frameworks.

**6.6. Island-Specific Blue Tourism Resilience Hubs:** Launch a regional programme to create localised “Blue Tourism Resilience Hubs” on Mediterranean islands to coordinate and implement sustainable tourism practices that address environmental, social, and climate challenges specific to insular contexts.

### SUPPORTING REFERENCES AND EXAMPLES

UNEP/MAP MSSD (2016–2025).<sup>9</sup>

Plan Bleu (2021) Sustainable Tourism in the Mediterranean Report.<sup>158</sup>

Interreg MED (2019) BlueTourMed Project Outcomes.<sup>159</sup>



Merja Zerga lagoon, Morocco ©Mubadarat/IUCN



## 7. SUSTAINABLE FINANCE AND INVESTMENT

### CHALLENGE ADDRESSED

Despite increasing recognition of the need for sustainable blue tourism, financial flows remain insufficient, fragmented, and often misaligned with regenerative goals. There is a lack of tailored instruments for small-scale tourism actors, limited access to blended finance, and minimal integration of ecosystem-based solutions in investment planning.

### ACTORS INVOLVED

Finance ministries, international financial institutions, multilateral development banks, national tourism boards, private equity firms, ESG investors, impact funds, donor agencies, development cooperation agencies, community banks and cooperatives.

### NARRATIVE

This pathway focuses on unlocking and aligning finance for sustainable Blue Tourism through innovative tools and partnerships. It supports the integration of biodiversity and climate considerations into mainstream investment and financing instruments. Blended finance (public-private funding), nature-based credits, and inclusive business models (national tax

incentives or subsidy mechanisms) are essential to closing the investment gap and scaling impact.

### POLICY ACTIONS

#### 7.1. Public and International Funding:

Leverage existing EU, multilateral, and bilateral instruments and funding programmes (e.g., Interreg, Horizon Europe, InvestEU, EMFAF, Green Climate Fund) to support the shift toward sustainable blue tourism and to upgrade infrastructure to reduce environmental impacts. Encourage alignment with regional investment frameworks under UNEP/MAP and UfM.

#### 7.2. Blended and Private Financing Mechanisms:

Establish co-financing frameworks that combine public funding (e.g. grants, concessional loans) with private investment in ecosystem restoration, renewables, and circular economy systems. To attract capital to regenerative tourism, incorporate de-risking tools such as guarantees, first-loss provisions, and technical assistance funds.

#### 7.3. Blue Carbon and Biodiversity Investments:

Support seagrass and wetland restoration by linking tourism to biodiversity and blue carbon credits, payments for ecosystem services, and nature-positive branding. Pilot tourism-integrated blue carbon initiatives using platforms such as the Blue Natural Capital Financing Facility, and integrate these mechanisms into Nationally Determined Contributions (NDCs) and SDG strategies.

#### 7.4. Community Finance Innovation:

Promote microfinance, revolving funds, and seed/small capital for tourism SMEs and cooperatives, especially those led by women, youth, and local communities. Align financial support with local stewardship plans and destination-level sustainability goals.

#### 7.5. Sustainability Scoring Model for Tourism Funding Allocation:

Develop a standardised sustainability scoring system to prioritise public and blended investments in line with environmental, climate, and social goals. Include clear criteria for impact, risk mitigation, and return expectations to support more informed and transparent investment decisions in the blue tourism space.

### SUPPORTING REFERENCES AND EXAMPLES

Plan Bleu (2025) Mobilizing Finance for Coastal Adaptation in the Mediterranean. Technical Report. GEF MedProgramme SCCF Project.<sup>160</sup>

Plan Bleu and UNEP/MAP (*in progress*). Environmentally Friendly Economic Tools and Finance: A Pathway to Sustainability in the Mediterranean.

NECSTouR (2022) EU Sustainable Tourism Funding Handbook (2022).<sup>161</sup>

UfM Blue Economy Roadmap-Pillar 5.<sup>109</sup>

IUCN (2024) Regenerative Blue Economy Report – Investment and Finance Section.<sup>125</sup>

Blue Natural Capital Financing Facility – Blue Carbon and NbS Financing Guides.

C4T – Handbook for accessing EU Tourism funding.

Funding and Financing Opportunities and Instruments on the EU Mission ‘Restore our Oceans and Waters’ portal.

## 6. Conclusions

The Mediterranean is at a critical crossroads where the future of blue tourism must reconcile environmental imperatives with socio-economic development. The report reveals that while tourism continues to be a key economic driver, accounting for a substantial share of GDP, employment, and investment in the region, it simultaneously exerts unsustainable pressure on ecosystems, communities, and infrastructure.

### Systemic Pressures and Vulnerabilities

Blue tourism in the Mediterranean is growing rapidly, yet unevenly, with a disproportionate concentration of arrivals and benefits in north-western countries. This growth is intensifying structural vulnerabilities, such as seasonal overdependence, unaffordable housing, job precarity, and the erosion of local cultural identity. Concurrently, the region faces compounding environmental risks: biodiversity loss, water stress, land degradation, and the degradation of key marine ecosystems like *Posidonia oceanica* meadows.

Climate change acts as a major risk amplifier. Rising sea levels, more intense droughts, marine heatwaves, and shifting seasonality are already affecting destination viability, particularly on islands and in southern and eastern Mediterranean regions. Geopolitical instability and global crises, exemplified by the COVID-19 pandemic and regional conflicts, have further exposed the fragility of the existing tourism model.

### The Imperative for Transformation

Tourism must evolve from a growth-oriented paradigm to one that is regenerative, inclusive, and climate-resilient. This transformation requires a fundamental shift in how destinations, businesses, and policymakers approach development, governance, and community engagement:

- Embracing Nature-based Solutions (NbS), while accelerating decarbonisation and resource efficiency, improving enhancing adapting capacity.
- Replacing mass tourism with low-impact, locally-rooted tourism models such as ecotourism, pescaturism, and cultural tourism.
- Aligning tourism with global and regional frameworks including the EU Green Deal, the SDGs, the Barcelona Convention, and national adaptation plans, ensuring a coherent governance architecture.
- Prioritising vulnerable regions, especially in the south and east of the Mediterranean, through targeted investment, knowledge transfer, and stakeholder empowerment.

### Ecosystem and Community Anchors of Resilience

The long-term resilience of Mediterranean blue tourism depends on safeguarding ecosystems and empowering local communities as stewards of change. Healthy marine and coastal ecosystems, particularly Marine Protected Areas (MPAs), are central to sustaining biodiversity, enhancing tourism quality, and buffering destinations against climate impacts. Yet MPAs remain underfunded and under-managed. Strengthening their governance, connecting them to tourism concessions and certification schemes, and aligning them with biodiversity outcomes are critical priorities.

Equally, local actors must be at the heart of the transition. SMEs, community groups, and women-led initiatives represent vital innovators and custodians of place-based knowledge. Supporting them with capacity-building, access to finance, and inclusion in decision-making ensures that tourism transitions are socially inclusive as well as environmentally sound.

### Policy and Governance Pathways Forward

The report outlines seven interconnected policy pathways across two pillars: thematic strategies (climate adaptation, mass tourism management, and product diversification) and enabling frameworks (governance, research, knowledge sharing, and finance). These pathways aim to:

- Embed sustainability into the planning and infrastructure of destinations.
- Foster cross-sector and multi-level governance integration.
- Establish robust science-policy-practice interfaces.
- Mobilise public and private finance mechanisms to support the transition.

The Mediterranean has the institutional architecture, scientific knowledge, and cultural heritage to lead a global shift toward regenerative tourism. What is now required is committed, coordinated implementation. As the region faces mounting ecological and geopolitical challenges, sustainable blue tourism is not merely an opportunity, it is an urgent necessity for ensuring ecological integrity, social well-being, and long-term economic vitality across the Mediterranean basin.



Umbrellas on a beach in Greece © Deravedisian/unsplash



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