

ENPI-MED PROGRAMME

PROJECT:

MEDITERRANEAN EXPERIENCE OF ECO-TOURISM (MEET)

WP4, Act. 4.3.2 **Criteria for Pilot Actions selection - APPROVED**

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INTRODUCTION

The first goal of this document is to be the main point of reference – for concerned MEET PPs – for the start-up of the Pilot Actions selection process in each of the 10 concerned countries (see Act. 5.1 "Selection and contracting of Natural Park Managing Bodies").

It contains the minimum standards each Pilot Action must respect (§ 2 "Common criteria for Pilot Actions selection") and additional criteria that can be added within any country-based selection process (§ 3 "Country-based criteria"), the latter being just a suggestion for each MEET PP.

Therefore only the "common criteria" have to be considered binding for all the Pilot Actions, while the "country-based criteria" have to be taken in account only as suggestions: each MEET PP is free to integrate (or not) some of them in the selection criteria that will steer the Pilot Actions selection process, and he can also add additional ones, not included in the lists of this document.

This document is based on the results of Act. 4.3.1 (Expected Pilot Actions features) but there are numerous additional elements in order to make it an easy-to-use reference for the MEET PPs and the concerned National Authorities to set up the process of Pilot Actions selection and contracting (Act. 5.1).

The timeframe of the whole Pilot Action implementation is set in the WP5 Time schedule; in any case all the Pilot Actions must finish (with the submission of the Final Report to the concerned MEET PP) by the end of 2014.

Therefore the Pilot Action selection and contracting process should end by the end of 2013, in order to make available 12 months for the Pilot Action implementation,

1 CONTENTS OF AN IDEAL PILOT ACTION

The main contents of an ideal Pilot Action should be:

- a. setting up an Ecotourism planning process through a participatory approach (see results of WP4 Act. 4.2: Guidelines for an ecotourism planning approach in the Mediterranean): creating a Forum involving all the stakeholders at local level, defining a roadmap, building up a common vision, approving an overall strategy and Action Plan, which includes among the priority actions the design of a Pilot ecotourism package.
- b. Implementing awareness raising campaigns, with a particular focus on local communities and economic operators, on the ongoing ecotourism planning process;
- c. tailoring at least one Pilot Eco-tourism package of at least 3 days (and 2 overnights) for low season, addressed to small groups (from 5 to 20 foreign people) and respecting the selection criteria set by the project; the setting up of the ecotourism package can foresee also the creation of some small infrastructure and/or facilities within the involved Protected Area, that can be part of the Pilot Action costs;
- d. testing (in a low-season – for the Protected Area – period) the Pilot Eco-tourism package through "testing" of at least two different target groups of eco-tourists (e.g. representatives of Tour Operators selected by the project, groups sent by a local TO, etc.) assessment of the customer satisfaction and of potential positive effects (environmental, economic and social ones) at local level, final design of Pilot Eco-tourism package.

Therefore it is clear that a Pilot Action within the MEET project is an activity made of two main pillars: the participatory planning process and the eco-tourism package design.

The participatory planning process must start and end within the Pilot Action timeframe (see WP5 Time schedule), must be based on the principles defined in Act. 4.2.2.4 ("Guidelines for an Ecotourism planning approach in the Med"), must be led by the Protected Area management body and must end with a formal commitment of the latter. Below the main standards are described.

An example of the possible steps/activities of an ideal participatory planning process can be summarized as follows:

- a. Survey of existing ecotourism-related resources of the Protected Area
- b. Creation of a Forum (through the identification of the stakeholders, establishment of Rules of Procedures, etc.) that is the main decision maker body
- c. Definition of the planning process roadmap to be followed
- d. Definition of a long-term vision, and of the strategy to reach it
- e. Awareness campaign towards local community, in order to raise interest, to inform on the occurring process and on the decisions taken by the Forum
- f. drafting of a 5-year Action Plan (through working groups)
- g. assembling of the Action Plan and adoption by the Forum.

A breakdown of such steps and related time length, cost estimation etc. can be found in the "Act 4.3_Pilot Actions contents and costs.xlsx" file.

The ecotourism package design and test is the second pillar of the Action Plan.

In fact among the Action Plan developed in the framework of the participatory planning a section dealing with the design of some ecotourism packages – whose contents (attractors, activities and services) are located mainly within the Protected Area – must be foreseen.

The dedicated working group must select the most feasible package(s) and develop it, tailoring it in relation with the project MEET expectations (see also the results of the Tour Operator interviews).

Possible steps/activities of this second stage of the Pilot Action can be summarized as follows:

- a. tailoring of an Ecotourism package and signing the agreement with any involved service provider
- b. renovation of small infrastructures/facilities (if needed, and if sufficient resources are available)
- c. test of the package(s), through at least 2 target-related (foreign eco-tourists) groups, provided by the MEET project
- d. carrying out of a customer satisfaction assessment (through a questionnaire provided by the MEET project)

Two examples of ideal ecotourism packages are presented in the "20130920_Act 4.3_Pilot Actions_examples of packages.doc" file, in order to better explain the philosophy of ecotourism and the expectation of MEET project towards the packages to be developed by selected Protected Areas.

2 COMMON CRITERIA FOR PILOT ACTION SELECTION

The criteria of this section must be considered the minimum standards each Pilot Action must respect, therefore they have to be considered binding and to be included – by the concerned MEET PP – in the official criteria of the Pilot Action selection procedure to be set for each country.

Also the assessment – by the concerned MEET PP – of the Pilot Actions Interim and Final Reports must first of all check the fulfillment of these criteria.

Preconditions for any Protected Area to submit a Pilot Action proposal are the following:

- A. The Pilot Actions must be implemented within a Protected Area, and shall be managed by the Protected Area management body (if existing) or by the competent National Institution
- B. Eligible protected area (whatever is the typology: e.g. Natura 2000 site, etc.) must be:
 - Located in a region eligible for ENPI-MED Programme (see http://www.enpicbmed.eu/documenti/29_153_20090109135603.pdf for the list)
 - Established with public Act
 - The Act identifies a managing body (already existing, not to be established!)

In order to assure the respect of the common standards, each Protected Area, when selected, becomes a member of the MEET Network (see WP6, Act. 6.1 "Establishment of MEET Network and Secretariat") and will receive the support of the Secretariat (PP5 IUCN-Med) and its Antenna (IUCN ROWA) in the framework of the capacity building strategy (see WP6, Act. 6.2 "Management of MEET Network and Secretariat").

Such strategy should foresee a first specific training at the beginning of the participatory planning approach, mainly dedicated to the Protected Area staff (managers and/or officers appointed for the setting up of the planning approach and the co-planning of the pilot eco-tourism package), and a second training initiative at the beginning of the ecotourism package tailoring, mainly dedicated to local stakeholders involved in the organization and management of the pilot eco-tourism package.

2.1 CONCERNING THE MANAGEMENT PROCESS OF THE PILOT ACTION

A. Preconditions

1. Active involvement of the Protected Area managing/responsible body (or Public institution responsible of) in the planning process must be assured
2. Conservation goals of the concerned Protected Area must be officially set in a binding document

B. Minimum standards required

1. have consistency with and contribute to the conservation goals of Protected Area
2. be consistent with sustainable sectorial development policies at national and local level
3. adopt a participated ecotourism planning approach and a cooperative management process
4. while setting up the process, identify the stakeholders taking into consideration local inhabitants identities, traditions and needs, specifically those of native people (if present) or small groups that are closely linked to their territory
5. set up a communication campaign towards the local community, which should be at the same time transparent (in spreading the meeting announcements, in publicizing the joint decisions, etc.) and effective
6. involvement of the local community representative institutions (both public – e.g. municipalities – and private – NGOs, etc.)
7. benefitting mainly the local economy(related to tourism) directly and indirectly, actually and potentially
8. contribute to creation/enhance of local employment

9. foresee the signature of a formal Strategy (and an Action Plan) by the Protected Area managing body (or Public institution responsible of) and representatives from local communities and local economic actors
10. design – in coordination with the other national selected Protected Areas implementing the Pilot Actions – at least one low-season (exceptions must be justified) Ecotourism package of at least three days (and two overnight), to be included in the MEET catalogue
11. test of the package through at least two “educational tour” (i.e. a free-of-charge enjoyment of the package) with foreign eco-tourists (or foreign Tour Operators representatives) identified by, or in agreement with, the concerned MEET PP
12. ensure the existence of a monitoring system of ecotourism package-related negative impacts on environmental/social/economical assets of the Protected Area.

2.2 CONCERNING THE ECO-TOURIST PACKAGE

A. Minimum standards required

1. Mainly designed in order to be offered to foreign eco-tourists, coming from English-speaking countries (USA, Canada, Australia) (see results of Act. 7.2.2 – networking with selected TOs: a short description of the target will be soon available)
2. the package must be in English;
3. possibility for all packages to be offered in additional languages, in order to be offered also to other markets of origin (starting from Japan: see results of Act. 7.2.2 – networking with selected TOs: a short description of the target will be soon available)
4. To be designed for small groups (from a minimum of 4 to a maximum of 16 people)
5. To offer at least 3 days (2 overnights) of activities and services included in the package
6. To be offered not in the peak season for the concerned Protected Area (exceptions must duly justified)
7. To mainly concern ecotourism attractions/facilities located in and around the protected area
8. To be original and innovative (see “Report on Ecotourism Best Practices”, Act. 4.1.3)
9. To support revitalization of less developed areas and rural communities (if this is consistent with conservation needs and needs of protection of local traditions and identity)
10. To assure minimum safety and quality standards (see results of Act. 7.2.2 – networking with selected TOs: a short description of the needed standards will be soon available)

B. Environmental sustainability (at least one):

1. Energy efficiency / Renewable Energies (EE/REs)
2. Reduction of Natural resources (water, soil, species, etc.) exploitation/extraction
3. Pollution (chemical, noise, etc.) and waste reduction
4. Sustainable mobility
5. Environmental impact raising awareness action

C. Economic sustainability (at least one):

1. Support/development of other related economic sectors (handicraft, etc.)
2. Use of innovative technologies
3. Mechanisms for financing sustainable activities (e. g. visitors payback schemes, etc.)

D. Social sustainability (at least two):

1. Increase of public awareness towards sustainability
2. Increase of local community awareness towards own territory/identity/etc.
3. Increase of local community standard of living
4. Distribution of product-related incomes to local community
5. Creation/rehabilitation of public spaces
6. Social integration (women, disabled, etc.)
7. Revitalization of cultural traditions
8. Opportunities for cross-cultural exchange
9. Cultural heritage protection

3 COUNTRY-BASED CRITERIA FOR PILOT ACTION SELECTION

For each of the 10 countries concerned in the MEET project, any responsible MEET PP can add additional criteria, taking advantage of the below indicative lists.

It can also add additional criteria, not included in these lists, but not in contradiction with project goals and with already approved WP4 related documents .

Also the assessment – by the concerned MEET PP – of the Pilot Actions Interim and Final Reports must first of all check the fulfillment of these criteria.

3.1 CONCERNING THE MANAGEMENT PROCESS OF THE PILOT ACTION

1. supporting the implementation of an ECST process (e.g. supporting the start up of the phase II or III of the ECST)
2. implementation of a Tourism Carrying Capacity system, or at least an assessment system on environmental impacts of the ecotourism package(s)
3. supporting the environmental certification of some services (accommodation, etc.)
4. linking the goals of the ecotourism planning process with another environment-related planning process (e.g. CBD Aichi Target 11, Natura 2000 conservation action plans,)

3.2 CONCERNING THE ECO-TOURIST PACKAGE

A. Physical context (indicative list)

1. marine
2. coastal (beach or rock)
3. plain

4. hill
5. mountain
6. lake, river
7. archaeological area
8. human settlement
9. desert

B. Fields of activity / typologies of services (indicative list):

1. bird-watching (fish watching, etc.) and/or howls-hearing (wolf-howling, etc.)
2. trekking, climbing, rafting, diving, etc.
3. caves discovery
4. guided tour in cultural sites
5. experience of meeting with local inhabitants
6. cultural activities (art, handicraft, etc.)
7. sustainable development education
8. participatory science/research
9. volunteering
10. sustainable transportation (electric cars, horse, bikes, traditional boats, etc.)
11. traditional/typical food and drinks
12. eco-accommodation
13. meditation (yoga...)

C. Targets composing the small group (4 to 16 people) (indicative list)

1. Individuals (mixed group)
2. Families (with children)
3. Teenagers (13-18 years old)
4. young people (19-25 years old)
5. adults (26-60 years old)
6. elders (more than 60 years old)
7. Physically or mentally disabled (blind, deaf, etc.) persons
8. Already structured groups (classrooms, environmental NGOs members, etc.)

D. Period of the year (indicative list)

1. Spring
2. Summer
3. Autumn
4. Winter

4 PILOT ACTION SELECTION PROCEDURE

In the MEET project there are 3 different situations, as follows.

- A. The MEET PP does not manage any Protected Area, nor is the central public Institution responsible for them (Italy, France, Greece), and Protected Areas have their own Managing body
- Every concerned PP should organize a public competition (it can be a “call for interest”, a “competitive negotiated procedure”, etc.) where it is asked to the eligible (they must be located in ENPI-MED eligible regions) Natural Park Managing bodies to present a proposal for the Pilot Action implementation (expected Pilot Action features and selection criteria must be priority published by the PP), following the minimum criteria (see above § 2) and other eventually integrated country-based criteria.
 - Each candidate (eligible Natural Park Managing bodies) must submit an offer describing the way how to implement the expected Pilot Actions and the related costs (for a maximum of 40.000 or 50.000 €, depending the allocated budget by each MEET PP);
 - the MEET PP must select the best one/s, applying the best value-for-money ratio, and appoint the task (signing a contract) to the selected Protected Areas among those who submitted an offer; it is worth mentioning that such contract has to be managed as a sub-contracting relationship (i.e. it is not a funding scheme) where each MEET PP cannot pre-finance the selected PA activity (since it is a service procurement)
 - The occurred expenditures (anticipated by each contracted PA) have to be reported together with technical Reports to the relevant MEET PP; therefore, according to the implementation timing of the Pilot Action(s), contracted PA will be reimbursed following the approval of, at least, an intermediate Progress Report and a Final Report, submitted by the contracted Natural Parks Managing Bodies and approved by the concerned MEET PP.
- B. The MEET PP manages / is responsible of one or more Protected Areas (Spain, Egypt, Jordan, Lebanon)
- The MEET PP can identify (justifying with technical reasons) among its own Protected Areas the most suitable ones to implement the Pilot Actions.
 - A “Pilot Action description” is prepared by the MEET PP for each Pilot Action, describing the way how to implement the expected Pilot Actions and the related costs (for a maximum of 40.000 or 50.000 €, depending the allocated budget by each PP); this description must comply with the common criteria set above (§ 2);
 - Activities (and related expenditures) are carried out directly by the MEET PP, and reported in the project Interim Report; if such expenditures are not sub-contracts Cost Category related, a budget shift is needed;
 - If the MEET PP is a Protected Area managing body (PP8 in Lebanon) he can implement one Pilot Action in its own Protected Area and can select – in agreement with the central Institution responsible for Protected Areas, justifying with technical reasons – the other Protected Area(s) to implement the remaining Pilot Action(s); in this case the selected Protected Area must submit an offer describing the way how to implement the expected Pilot Actions and the related costs and such offer must be assessed by MEET PP if it complies with the common selection criteria set by the project; it is worth mentioning that a contract must be signed with the Protected Area managing body and it has to be managed as a sub-contracting relationship (i.e. it is not a funding scheme) where each

MEET PP cannot pre-finance the selected PA activity (since it is a service procurement, see above point A).

- C. The MEET PP does not manage any Protected Area, nor is the central public Institution responsible for them (Malta, Cyprus, Tunisia), and Protected Areas are managed at central level
- In situation of “natural monopoly”, i.e. when there are no independent Protected Areas Managing Bodies but only a central (governmental) institution responsible of Protected Areas management, the competition cannot occur and therefore a call for interest is avoided.
 - The MEET PP, in agreement with the competent institution, must identify (detailing technical reasons) the suitable Protected Areas where to implement the Pilot Actions.
 - A “Pilot Action description” must be prepared by the competent Institution for each Pilot Action, describing the way how to implement the expected Pilot Actions and the related costs (for a maximum of 40.000 or 50.000 €, depending the allocated budget by each PP); this description must comply with the common criteria set above (§ 2);
 - The competent Institution can participate in the implementation of the Pilot Action, or can identify other organizations (public or private) to be involved in the Pilot Action implementation: the latter can be contracted as subcontractors by the competent Institution or by the MEET PP;
 - A framework agreement (Memorandum of Understanding, etc.) instead of a contract must be signed between the MEET PP and the competent Institution, the latter being responsible for the Pilot Action implementation (and all the related expenditures);
 - The occurred expenditures (anticipated by the competent Institution) have to be reported together with technical Reports to the relevant MEET PP; therefore, according to the implementation timing of the Pilot Action(s), the competent Institution (or sub-contracted organization) will be reimbursed following the approval of, at least, an intermediate Progress Report and a Final Report, submitted by the competent Institution (or sub-contracted organization) and approved by the concerned MEET PP.

5 ELIGIBLE CANDIDATES PER COUNTRY

Any potentially to-be-contracted organization must be located in an ENPI-Med eligible region.

For each of the 10 countries concerned in the project MEET, an indication of the actors which can present a bid for the Pilot Action implementation is provided below.

1. Italy: 3 Protected Areas that have already signed the ECST / are in the process for / have formally started the process, selected by Ben (Federparchi) through a “Call for interest”
2. France: PP2 selected *National Parks located in ENPI-Med eligible regions and labelled with ECST are only two Cevennes National Park and Mercantour National Park, so they will be selected for Pilot Action implementation.*
3. Spain: 3 Regional Protected Areas of Cataluña, selected by the competent Institution (PP4 - Cataluña Region)
4. Egypt: (not available)
5. Jordan: 3 Protected Areas, selected among the Protected Areas managed by RSCN

6. Lebanon: 3 Protected Areas, selected by PP8 (ASCS) and the Ministry of Environment
7. Greece: 2 Protected Areas, selected by PP3 (MedPAN) through a call for interest
8. Malta: 2 marine Protected Areas, selected by PP3 (MedPAN) and Malta Environment and Planning Authority, the central Institution responsible for all the marine Protected Areas
9. Cyprus: 1 marine Protected Area (the only existing), selected by PP3 (MedPAN) and Department of Fisheries and Marine Research – DFMR (Ministry of Agriculture, Natural Resources and Environment), the central Institution responsible for all the marine Protected Areas
10. Tunisia: one marine Protected Area, selected by PP3 (MedPAN) and APAL (the central Agency responsible for all the marine Protected Areas) and one terrestrial, selected by PP5 (IUCN-Med) and General Directorate of Forests – Ministry of Agriculture (the central Institution responsible for all the terrestrial Protected Areas)

6 REFERENCE DOCUMENTS

- a. Best Practices Database (folder “meet.zip” and file “20130904_MEET_Act 4.1_DB on BPs_how to use.docx”)
- b. Report on Eco-tourism Best Practices of approaches and experiences (files “20130924_MEET_Act 4.1_BPs DB_Report_draft.docx” and “20130923_Act 4.1_Report on nat policies_draft[2].docx”)
- c. Guidelines for an ecotourism planning approach in the Med (file “20130926_Act 4.2.1_Ecotourism planning approach_guidelines_draft[3].docx”)
- d. Expected Pilot Actions features (files “20130926_Act 4.3.1_expected Pilot Actions features_DRAFT.doc”, “20130926_Act 4.3_Pilot Actions contents and costs.xlsx” and “20130920_Act 4.3_Pilot Actions_examples of packages.doc”)