

**Session 1 – Setting the Stage: Positioning the  
Mediterranean in the Global Market –  
Opportunities and Challenges**  
*23 Jun 2015*



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**Miguel Payeras, Managing Director**

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# Tourism

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The only destination group growing is **“Others”**

## Diversification of destinations

Rank	1950	Share	1970	Share	1990	Share	2010	Share
1	United States		Italy		France		France	
2	Canada		Canada		United States		United States	
3	Italy	71%	France	43%	Spain	39%	China	31%
4	France		Spain		Italy		Spain	
5	Switzerland		United States		Austria		Italy	
6	Ireland		Austria		Mexico		United Kingdom	
7	Austria		Germany		Germany		Turkey	
8	Spain	17%	Switzerland	22%	United Kingdom	18%	Germany	14%
9	Germany		Yugoslavia		Canada		Malaysia	
10	United Kingdom		United Kingdom		China		Mexico	
11	Norway		Hungary		Greece		Austria	
12	Argentina		Czechoslovakia		Portugal		Ukraine	
13	Mexico	9%	Belgium	10%	Switzerland	9%	Hong Kong (China)	11%
14	Netherlands		Bulgaria		Yugoslav SFR		Russian Federation	
15	Denmark		Romania		Malaysia		Canada	
	Others	3%	Others		Others		Others	44%
<b>Total</b>	<b>25 million</b>		<b>166 million</b>		<b>436 million</b>		<b>940 million</b>	

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Is **intensity** the only way forward?



Destination	Annual Visitors / Resident
Majorca	14
Minorca	14
Ibiza	25
Formentera	120
Vatican	5.500
Venice Old Quarter	365
Andorra	105
Venice	81
Las Vegas	75

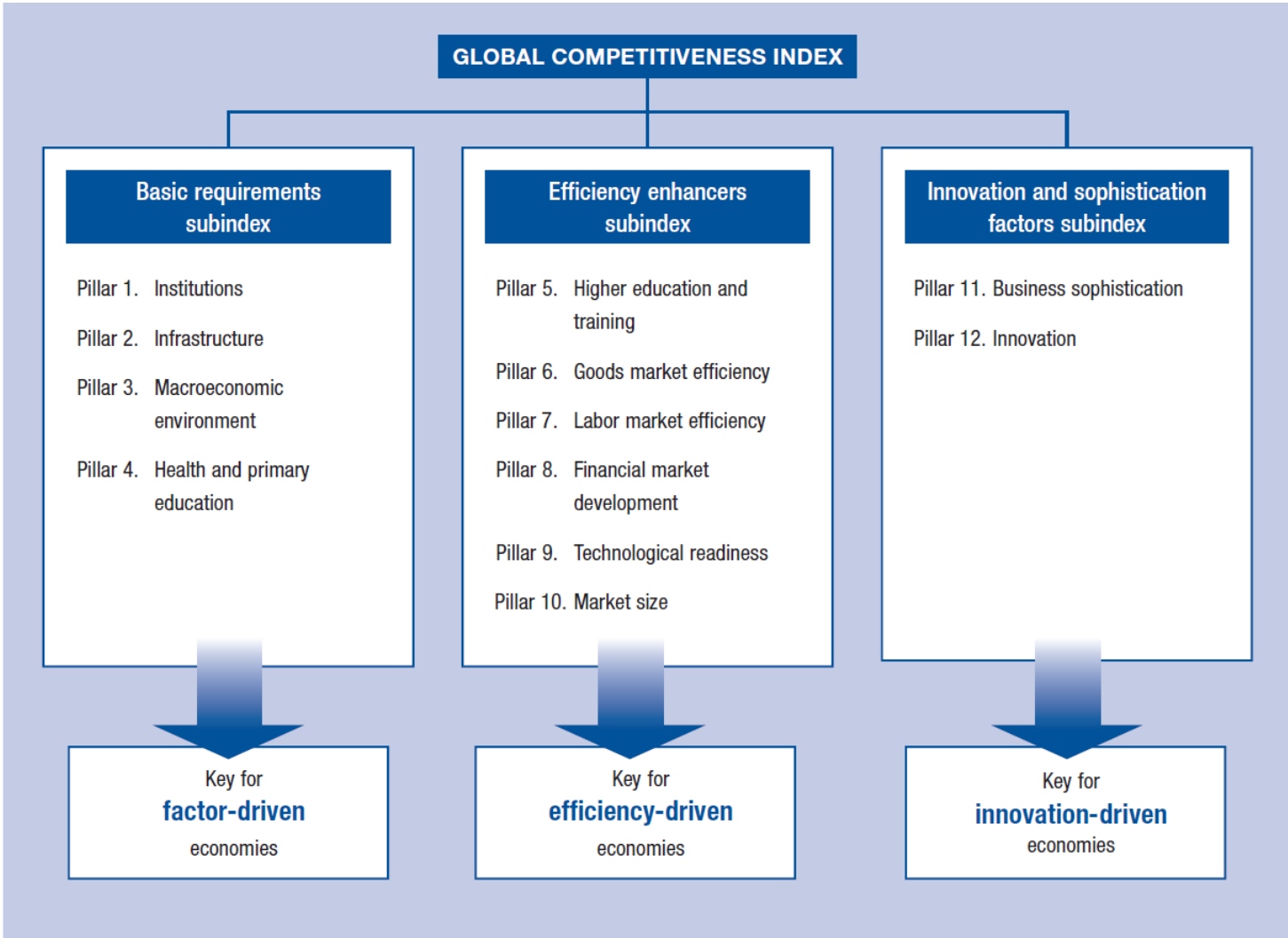
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# Competitiveness

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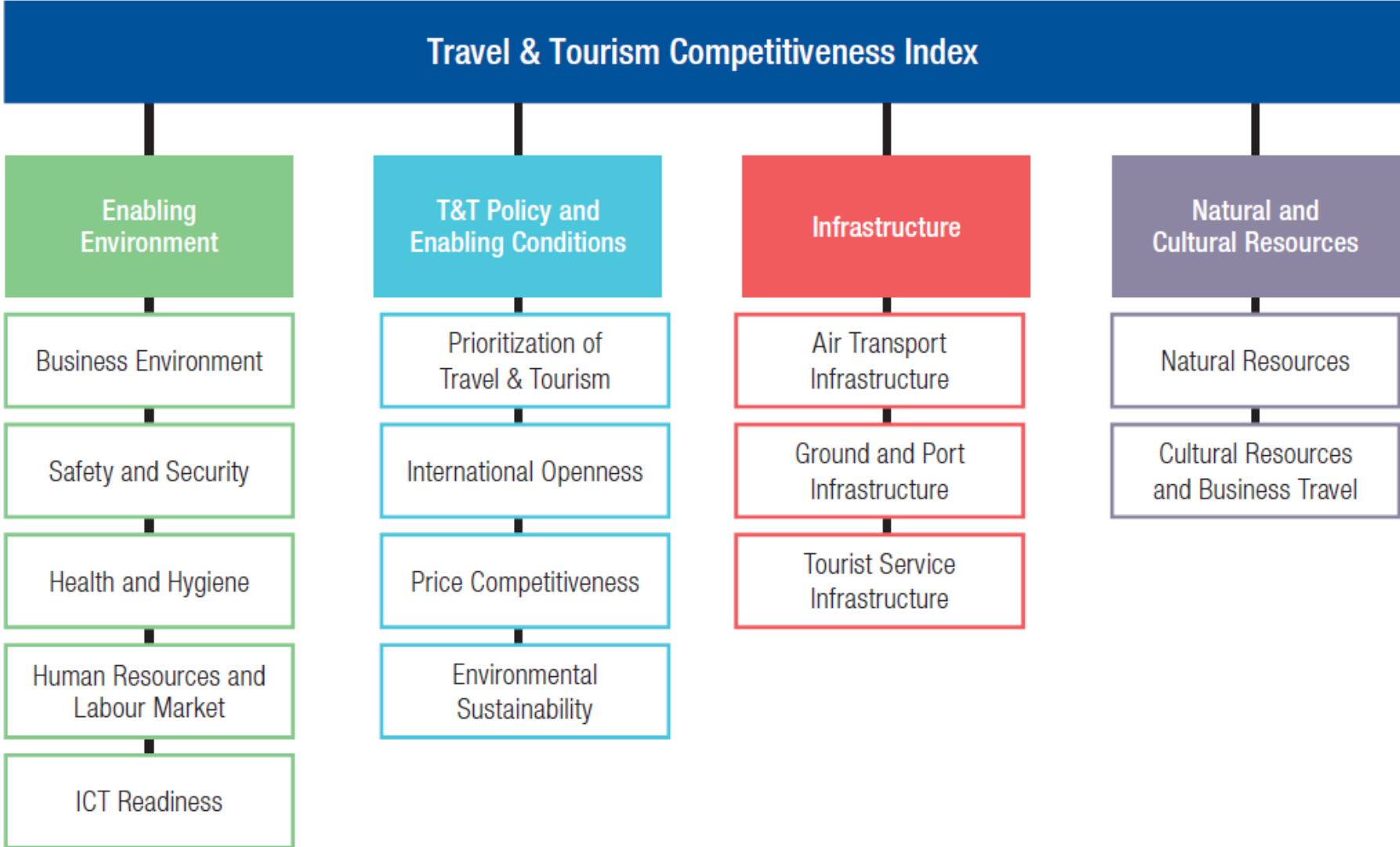
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Stage 1: Factor-driven (37 economies)	Transition from stage 1 to stage 2 (16 economies)	Stage 2: Efficiency-driven (30 economies)	Transition from stage 2 to stage 3 (24 economies)	Stage 3: Innovation-driven (37 economies)
Bangladesh	Algeria	Albania	Argentina	Australia
Burkina Faso	Angola	Armenia	Bahrain	Austria
Burundi	Azerbaijan	Bulgaria	Barbados	Belgium
Cambodia	Bhutan	Cape Verde	Brazil	Canada
Cameroon	Bolivia	China	Chile	Cyprus
Chad	Botswana	Colombia	Costa Rica	Czech Republic
Côte d'Ivoire	Gabon	Dominican Republic	Croatia	Denmark
Ethiopia	Honduras	Egypt	Hungary	Estonia
Gambia, The	Iran, Islamic Rep.	El Salvador	Kazakhstan	Finland
Ghana	Kuwait	Georgia	Latvia	France
Guinea	Libya	Guatemala	Lebanon	Germany
Haiti	Moldova	Guyana	Lithuania	Greece
India	Mongolia	Indonesia	Malaysia	Hong Kong SAR
Kenya	Philippines	Jamaica	Mauritius	Iceland
Kyrgyz Republic	Saudi Arabia	Jordan	Mexico	Ireland
Lao PDR	Venezuela	Macedonia, FYR	Oman	Israel
Lesotho		Montenegro	Panama	Italy
Madagascar		Morocco	Poland	Japan
Malawi		Namibia	Russian Federation	Korea, Rep.
Mali		Paraguay	Seychelles	Luxembourg
Mauritania		Peru	Suriname	Malta
Mozambique		Romania	Turkey	Netherlands
Myanmar		Serbia	United Arab Emirates	New Zealand
Nepal		South Africa	Uruguay	Norway
Nicaragua		Sri Lanka		Portugal
Nigeria		Swaziland		Puerto Rico
Pakistan		Thailand		Qatar
Rwanda		Timor-Leste		Singapore
Senegal		Tunisia		Slovak Republic
Sierra Leone		Ukraine		Slovenia
Tajikistan				Spain
Tanzania				Sweden
Uganda				Switzerland
Vietnam				Taiwan, China
Yemen				Trinidad and Tobago
Zambia				United Kingdom
Zimbabwe				United States

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Country/Economy	TTCI INDEX		Enabling Environment Pillars, values				
	Regional rank	Global rank	Business Environment	Safety and Security	Health and Hygiene	Human Resources and Labour Market	ICT Readiness
<b>SOUTHERN AND WESTERN EUROPE</b>							
Spain	1	1	4.09	5.97	6.11	4.87	5.26
France	2	2	4.52	5.44	6.52	4.96	5.55
Germany	3	3	5.32	6.06	6.85	5.18	5.51
Switzerland	5	6	5.76	6.32	6.50	5.64	6.03
Italy	6	8	3.59	5.68	6.27	4.45	5.14
Austria	7	12	4.94	6.47	6.97	5.09	5.70
Netherlands	8	14	5.44	6.16	6.24	5.13	5.96
Portugal	9	15	4.54	6.33	6.06	5.18	4.97
Belgium	13	21	4.71	6.18	6.49	5.03	5.47
Luxembourg	16	26	5.73	6.46	6.26	5.16	6.09
Greece	18	31	4.04	5.49	6.57	4.75	4.71
Croatia	19	33	3.65	6.00	6.33	4.41	5.03
Cyprus	20	36	4.72	6.00	5.80	5.16	4.63
Slovenia	23	39	4.03	6.20	6.05	4.69	5.07
Malta	24	40	4.76	6.03	6.35	4.61	5.24
Montenegro	33	67	4.39	5.69	5.71	4.85	4.42
Macedonia, FYR	34	82	4.87	5.75	5.99	4.47	4.47
Serbia	35	95	3.38	5.46	6.04	4.29	4.45
Albania	36	106	4.11	5.34	5.22	4.68	4.07
<b>Southern and Western Europe average</b>			<b>4.56</b>	<b>5.95</b>	<b>6.23</b>	<b>4.87</b>	<b>5.14</b>
Europe standard deviation			0.69	0.35	0.41	0.35	0.59

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Country/Economy	T&T Policy and Enabling Conditions Pillars, values				Infrastructure Pillars, values			Natural and Cultural Resources Pillars, values	
	Prioritization of T&T	International Openness	Price Competitiveness	Environmental Sustainability	Air Transport Infrastructure	Ground and Port Infrastructure	Tourist Service Infrastructure	Natural Resources	Cultural Resources & Business Travel
<b>SOUTHERN AND WESTERN EUROPE</b>									
Spain	5.89	3.93	4.22	4.61	4.91	5.54	6.58	4.59	6.69
France	5.16	4.22	2.95	4.67	4.98	5.78	6.15	4.80	6.56
Germany	4.84	4.24	3.62	4.90	4.93	5.99	5.61	4.41	6
Switzerland	5.64	4.11	2.57	5.63	5.03	6	6.35	4.32	2.93
Italy	4.62	4.09	3.49	4.34	4.26	4.65	6.66	4.60	6.51
Austria	5.52	3.99	3.49	5.13	4.01	5.42	6.83	4.07	2.92
Netherlands	4.66	4.25	3.56	4.81	4.89	6.21	4.62	3.19	3.51
Portugal	5.46	4.21	4.23	4.42	3.91	4.54	6.12	3.70	3.71
Belgium	4.47	4.13	3.73	4.28	3.83	5.96	5.65	2.65	3.67
Luxembourg	4.64	4.25	4.10	5.23	3.59	5.73	4.67	3.09	1.62
Greece	5.36	4.09	3.93	4.19	4.25	4.01	6.08	3.49	2.82
Croatia	4.51	4.14	4.28	4.38	3.06	4.20	6.35	3.80	2.67
Cyprus	5.96	3.75	3.97	3.92	3.48	4.91	6.77	2.66	1.88
Slovenia	4.93	3.70	4.34	4.74	2.44	5.13	5.72	3.87	1.40
Malta	6.03	3.94	4.22	4.17	3.83	4.98	5.61	2.22	1.44
Montenegro	4.57	2.44	4.48	4.30	3.03	3.51	5.84	2.76	1.09
Macedonia, FYR	4.41	2.36	4.55	3.65	2.39	3.25	4.58	2.15	1.30
Serbia	3.83	2.39	4.56	4.08	2.13	2.95	4.50	1.90	1.61
Albania	4.03	2.34	4.38	3.60	2.16	3.01	3.94	2.03	1.14
<b>Southern and Western Europe average</b>	<b>4.98</b>	<b>3.71</b>	<b>3.93</b>	<b>4.48</b>	<b>3.74</b>	<b>4.83</b>	<b>5.72</b>	<b>3.38</b>	<b>3.13</b>
Europe standard deviation	0.65	0.72	0.54	0.52	0.99	1.08	0.87	0.95	1.95

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# Prosperity



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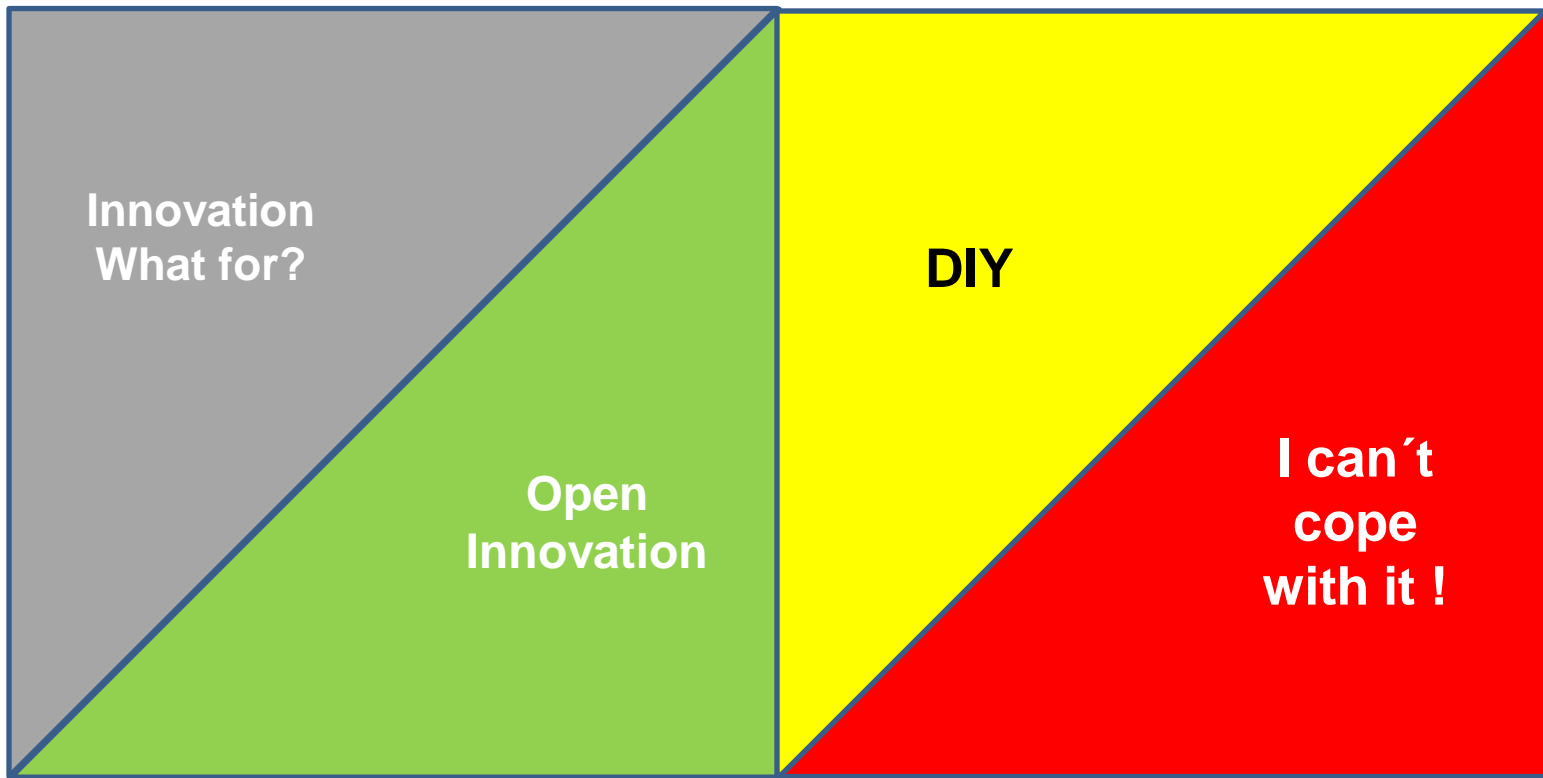
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# Opportunity



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***Many thanks! – Hvala!***



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