

**SHORT REPORT //**

**Peer Learning Workshop  
“Sustainable Pathways for the  
Tourism Industry in Malta”**

Summary Report // 15 June 2022

This SHORT Report is conducted within the framework of the ESPON 2020 Cooperation Programme, partly financed by the European Regional Development Fund.

The ESPON EGTC is the Single Beneficiary of the ESPON 2020 Cooperation Programme. The Single Operation within the programme is implemented by the ESPON EGTC and co-financed by the European Regional Development Fund, the EU Member States and the Partner States, Iceland, Liechtenstein, Norway and Switzerland.

This delivery does not necessarily reflect the opinions of members of the ESPON 2020 Monitoring Committee.

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ISBN: 978-2-919816-51-4

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Layout and graphic design by BGRAPHIC, Denmark

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**Disclaimer**

The information contained herein is subject to change and does not commit the ESPON EGTC and the countries participating in the ESPON 2020 Cooperation Programme.

The final version of the report will be published as soon as approved.



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# Abbreviations

ALDREN	ALliance for Deep RENovation in buildings
FLEXIGRID	Interoperable solutions for implementing holistic FLEXibility services in the distribution GRID
H2020	Horizon 2020
KPI	Key performance indicator
nZEB	Nearly Zero Energy Buildings
RDI	Research, Development and Innovation
SCALIBUR	SCALABLE TECHNOLOGIES FOR BIO-URBAN WASTE RECOVERY
SME	Small-medium sized enterprises
UNWTO	World Tourism Organization a UN Specialized Agency
WATLY	An autonomous and mobile water treatment plant powered by solar energy
ZEB	Zero Energy Buildings

# 1 Introduction

Like earlier pandemics, COVID-19, had a devastating impact on the tourism sector, with the consequences still being felt. Pandemics often result in a considerable drop in visitor arrivals, and as such the spread of COVID-19 also caused a worldwide downturn in international travel. Demand, spending, consumer confidence and, consequently, supply all dropped during the COVID-19 outbreak, raising problems that must be quickly resolved and which require policy intervention and action

A major economic contributor to the Maltese economy is tourism. In 2018, tourism rendered directly 33,180 jobs and 14.9% of total employment, and it is one of the top five contributors to the economy in Malta, with a GDP contribution of 12.8% in 2018<sup>1</sup>. Following ten years of recurrent record growth between 2010 and 2019, which was bolstered by the country's enhanced airline connectivity and its reduced seasonality, Malta experienced an unprecedented dip in performance due to the COVID-19 pandemic. The Maltese tourism sector also faces several challenges, such as integrating quality at all levels of the value chain, rebuilding the airline route network, and encouraging collaboration across diverse digital tourism efforts by consolidating and effectively using data. Tourism recovery will need to take into consideration these challenges, along with the new demands of the post-COVID-19 reality and the accelerated effects of climate change that pose direct threats to tourism. This will require a shift away from the previous economic model, implying more sustainable approaches to development.

The online ESPON Peer Learning Workshop on Sustainable Pathways for the Tourism Industry in Malta was implemented within this context with the aim to collect insights into the sustainable development challenges of the Maltese tourism sector, the recent strategies devised for their resolution, showcase innovative sustainability solutions created in diverse international initiatives, as well as to further the discussion of key Maltese tourism stakeholders (representing the policy, industry, research, innovation and capacity-building dimensions) on viable sustainability pathways for the Maltese tourism industry with an emphasis on the hospitality sector.

The ESPON Peer Learning Workshop "Sustainable Pathways for the Tourism Industry in Malta" (more information at <https://www.espon.eu/espon-malta-event-sustainable-tourism>) took place on 30 May, 2022 and it was organised together with INOVA+ INNOVATION SERVICES S.A. and stakeholders from Malta. The workshop involved key stakeholders from the Maltese tourism industry, namely the Ministry for Tourism in Malta and the Malta Tourism Authority. The event programme is shown further below.

This report aims to provide statistics on the peer learning workshop and present conclusions and reflections on the sustainability solutions showcased during the event.

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<sup>1</sup> OECD Library. [Online]. *Malta*. Available at <https://www.oecd-ilibrary.org/sites/ade41547-en/index.html?itemId=/content/component/ade41547-en#section-d1e126930>. [Accessed 6 June 2022]



## Peer Learning Workshop programme – “Sustainable Pathways for the Tourism Industry in Malta”

### Sustainability challenges, strategies, and management tools

10:00	Introduction
10:05	Welcome speech
10:20	Sustainable tourism challenges and strategies in Malta
10:45	Digital transformation for sustainable Maltese tourism development
11:00	Q&A
11:10	Break
11:25	TOURISM - Carrying capacity methodology for tourism
11:45	Tourism: Innovation for sustainability
12:05	Q&A
12:15	Lunch break

### Solutions and pathways for a sustainable and resilient tourism industry

13:15	Technologies and frameworks for a sustainable hospitality sector <ul style="list-style-type: none"><li>❖ Nearly Zero Energy Hotels</li><li>❖ ALDREN – Alliance for Deep RENovation in Buildings</li><li>❖ CSMS: Smart, energy efficient air-condition</li><li>❖ FLEXIGRID-Interoperable solutions for implementing holistic FLEXibility services in the distribution GRID</li><li>❖ WATLY: An autonomous and mobile water treatment plant powered by solar energy</li><li>❖ SCALIBUR: Scalable technologies for bio-urban waste recovery</li></ul>
15:15	Break
15:25	Panel Discussion
16:20	Closing

## 2 Registration and participation data

Prior to and during the registration process, the peer learning workshop was promoted through various communication channels with the aim to engage principally Maltese tourism stakeholders to participate in the event, as well as other non-Maltese parties with interest in the addressed theme.

Save-the-date communication materials were produced and disseminated to announce the workshop in an early phase, capitalising on established communication platforms of ESPON EGTC, the Ministry for Tourism in Malta and the Malta Tourism Authority and INOVA+ (email lists, website and social media).

Invitation emails were distributed with the help of the Maltese stakeholders involved in the event organisation, the Malta Hotels and Restaurants Association and the Malta Chamber of Commerce. Dedicated promotional materials were also sent to the University of Malta, Institute of Tourism Studies in Malta, UN World Tourism Organisation, the European Regions Research and Innovation Network, NECSTouR, Startup Europe Regions Network and key European initiatives involved in the event.

Additionally, a direct promotional approach was made to the HR departments of 36 Maltese 4- and 5-star hotels. These were contacted via phone calls and two follow-up emails.

### Registration data

The peer learning workshop counted with the registration of 38 individuals. The registrations came primarily from Malta (N=23), followed by Italy (N=7), Luxembourg (N=2), France (N=2), Spain (N=2), the United Kingdom (N=1), and Croatia (N=1). Note that 5 of the 6 registrations from Italy and 1 of the 2 registrations from France were from individuals representing Maltese tourism organisations. The data on individuals' countries is available in Figure 1. The registered individuals were from a wide range of organisations: 29 from policy-making bodies, 5 from higher education institutions, and 4 from other sorts of organisations (e.g., travel agencies, local foundation, tourism initiative).

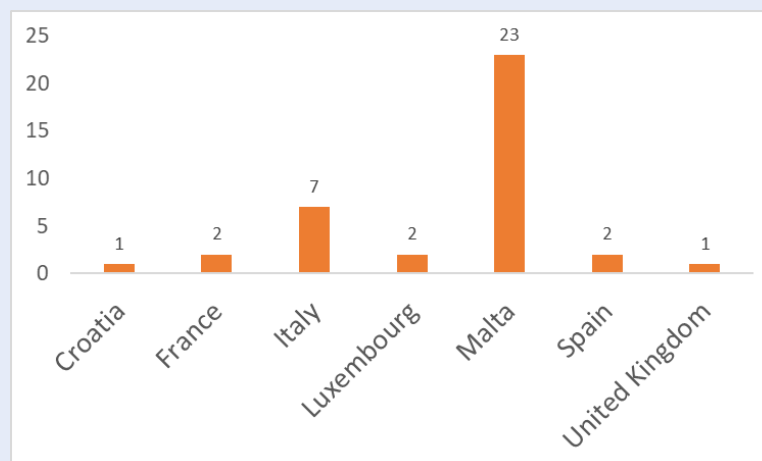
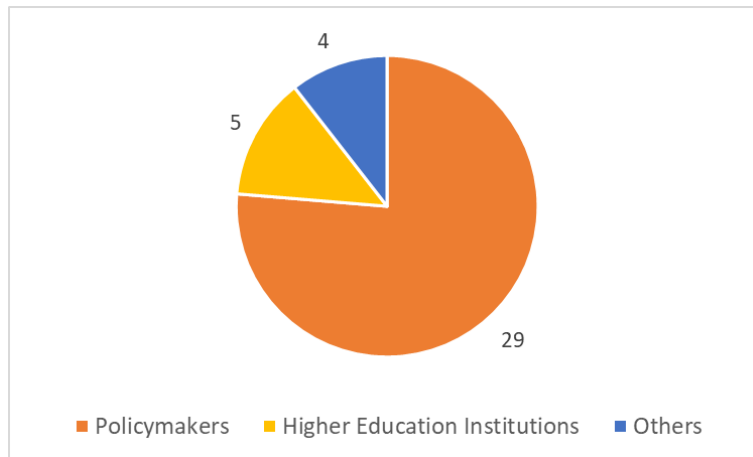


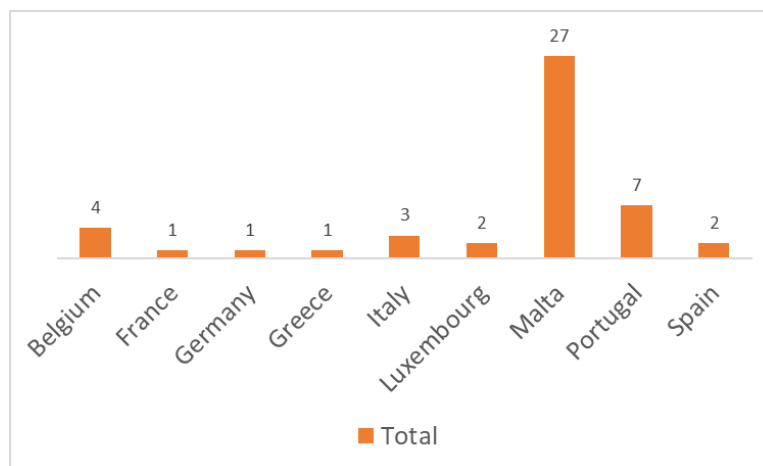
Figure 1. Registration data by country



**Figure 2. Registration data by typology of entities**

### Participation data

The peer learning workshop counted with the attendance of 48 participants altogether. The majority of the participants came from Malta (N=27), followed by Portugal (N=7), Belgium (N=4), Italy (N=3), Luxembourg (N=2), Spain (N=2), France (N=1), Germany (N=1) and Greece (N=1), as shown in Figure 3. Due to Zoom's privacy configurations, it was only feasible to collect the names (usernames) and the countries of the audience members, hence it was not possible to identify all participants' organisations.



**Figure 3. Participation data by country**

It is of note that the event also counted with the presence of 20 speakers coming from ESPON EGTC, the Ministry for Tourism and the Ministry for The Economy, European Funds and Lands in Malta, the Malta Tourism Authority, The Malta Chamber of Commerce, the University of Malta, the Institute of Tourism Studies in Malta, as well as from the European and global initiatives. A part of these speakers and their organisations represented key target groups of the event.

### 3 Short presentation of sustainability solutions for the tourism sector

The Peer learning workshop presented several sustainability solutions promoted in the frame of range of European research, development and innovation projects (RDI) and a global initiative, the UNWTO.

The RDI projects received funding from three programmes: Horizon 2020 (H2020), Intelligent Energy Europe Programme (IEE) and the European Observation Network for Territorial Development and Cohesion (ESPON). IEE was a multi-annual EU funding programme (2007-2013) contributing to the delivery on the EU's climate change and energy targets and H2020 was a multiannual EU RDI financing programme (2014-2020) providing funding to RDI projects to ensure Europe's global competitiveness by outstanding science, and industrial leadership, while tackling societal issues. The ESPON 2020 Programme aims at promoting and fostering a European territorial dimension in development and cooperation by providing evidence, knowledge transfer and policy learning to public authorities and other policy actors at all levels.<sup>2</sup>

**The presented solutions address three key domains of tourism development: destination carrying capacity (TOURISM), digitalisation and digital skill development (UNWTO programmes) and environmental sustainability (neZEH, ALDREN, CSMS, FLEXIGRID, WATLY, SCALIBUR). A short description of each of these initiatives is included in**

Table 1.

**Table 1. Short descriptions of the presented sustainability solutions**

**ESPON Carrying Capacity Methodology for Tourism (TOURISM):** The TOURISM project (<https://www.espon.eu/tourism>) established a novel methodology for measuring tourist capacity, making use of new technologies, alternative data sources, and innovative indicators. The capacity measurement takes into account the individual characteristics of the areas and their inherent vulnerabilities, applying a place-based approach. In particular, the TOURISM methodology is deployed in five steps: 1. Destination overview; 2. Identification of relevant causal loops between tourism and the territorial context; 3. Measurement of tourism flows; 4. Combining tourism effects and territorial context; 5. Identification of means to fight overtourism/paths towards sustainable tourism and formulation of policy recommendations.

**UNWTO Programmes:** UNWTO offers three key programmes for tourism stakeholders related to digitalisation / facilitated by digital tools: 1) Tourism Online Academy (<https://www.unwto-tourismacademy.ie.edu>), where higher education institutions can upload content to the public and participants obtain a certificate of completion; 2) UNWTO & Google Acceleration Programme (<https://www.unwto.org/unwto-acceleration-programme>) targets public servants (destination managers) and aims to build capacity by keeping them up to date on newer technologies and innovative approaches (e.g. creating digital marketing campaigns; promote the destination via digital channels) and 3) UNWTO Digital Futures for Tourism SMEs Programme (<https://www.unwto.org/digitalfutures>), which aims to assess where SMEs stand in terms of the uptake of technologies and offer capacity-building help their digitalisation processes (digital payment, artificial intelligence, digital marketing, cloud, CRM and operations within an SME), assisting them also in the creation of digital systems in their businesses.

**Nearly Zero-Energy Hotel (neZEH):** NeZEH (<http://www.nezeh.eu/>) aimed to accelerate the rate of large-scale renovations of existing hotels into Nearly Zero Energy Buildings (nZEB) by: providing technical advice to committed hoteliers; demonstrating flagship nZEB projects in the European hospitality sector; and undertaking training and capacity building activities. The neZEH e-toolkit empowers SME hoteliers to assess their energy consumption, identify solutions to minimize their energy costs and to reach energy efficiency improvement towards NZEB, as well as to get an estimate on the return on investment. The initiative also developed training materials for hotel owners and building professionals and a practical guide and tips for hotel managers and staff.

<sup>2</sup> ESPON. [Online]. *European Territorial Observatory Network*. Available at <https://www.espon.eu/programme/espon/espon-2020-cooperation-programme>. [Accessed 6 June 2022]

**Alliance for Deep energy renovation in buildings (ALDREN):** The main objective of ALDREN (<https://aldren.eu/>) was to support investments in deep energy renovation, providing a transparent, consistent, common EU-wide assessment framework and decision-supporting protocols and tools. ALDREN results are modular and holistic, involving modules like the step-by-step protocol to assess energy performance, indoor environmental quality and financial value of buildings before and after energy renovation. The modules can be used to produce a set of KPIs and recommendations for renovations that are reported in a European Voluntary Certificate and a Building Renovation Passport.

**Smart, energy efficient air-condition (CSMS):** CSMS (<https://elencon.com/>) provided a technology-based solution for energy efficiency for air conditioning. It minimizes cooling expenses through using predictive artificial intelligence for air conditioning chiller efficiency optimization in hotels.

**Interoperable solutions for implementing holistic FLEXibility services in the distribution GRID (FLEXIGRID):** FLEXIGRID's (<http://www.flexigrid-h2020.eu/>) main objective is to allow the distribution grid to operate securely and stably when a larger share of variable generation electricity sources is connected to low and medium voltage grids. This might be achieved through flexibility, reliability and economic efficiency. Benefits of FLEXIGRID to the hospitality sector are the reduction of energy costs, CO2 emissions, optimization of infrastructure use and contribution to tenants' comfort through blackout support utilizing battery storage systems.

**An autonomous and mobile water treatment plant powered by solar energy (WATLY):** WATLY (<https://watly.co/>) developed systems powered by solar energy that are capable of condensing air and producing purified, drinkable water out of it, including solutions for purifying sea water for delivering drinkable water. Several versions of this system were created in different dimensions and functionalities, including a water vending machine with interest for the tourism sector.

**Scalable technologies for bio-urban waste recovery (SCALIBUR):** SCALIBUR (<https://scalibur.eu/>) introduced innovative systems and technologies and proposes the transformation of waste from hotels, restaurants and catering (HORECA waste) into proteins, lipids and chitin from insect rearing and the organic part of municipal solid waste into biopesticides and bioplastics.

## 4 Conclusions and reflections on sustainability solutions for the tourism sector

In recent years, Malta faced a significant increase in its tourism activity. Tourist arrivals nearly duplicated between 2008 and 2018, resulting in 2.59 million visitors in 2018<sup>3</sup>. While the growth of the Maltese tourism industry had several positive impacts (e.g. job creation, income generation), it also caused negative consequences, ranging from pollution and environmental damage to overcrowding, noise and aesthetic alterations of public spaces, with implications on residents' daily lives and the liveability in Maltese touristic areas. Following the major drop in tourism caused by the COVID19 pandemic, Malta set as a priority rebuilding the tourism numbers within the shortest time possible. This, however, is planned to be achieved on more sustainable grounds, eliminating or reducing the previously unattractive aspects of tourism (some are referred above) and introducing and strengthening sustainable approaches (e.g. positioning Malta as a quality destination). The optimised management of Malta's tourism carrying capacity is crucial for achieving more sustainable tourism activity, and decreasing the adverse effects of the tourism industry. The first and key step of this process is creating a clear understanding of Malta's tourism carrying capacity.

The ESPON TOURISM project confirmed that when it comes to tourism, indeed individual territories within a country may face different realities. Tourism, on the one hand, is embedded in unique territorial frameworks and, on the other hand, tourism activity in a country and a region is not distributed evenly. In particular, there are tourism hotspots that attract a larger number of visitors and where the negative impacts of tourism are more intensely felt and seen. The specific territorial settings and differing tourist flows create unique conditions that need targeted interventions to better manage the carrying capacity, avoid "overtourism" and minimise the negative consequences of the high concentration of tourists. The ESPON TOURISM methodology, therefore, represents a very useful tool for the Maltese tourism sector for identifying the tourism carrying capacity on the island by offering a holistic approach for carrying capacity measurements, taking into consideration all these aspects, including the tourist inflows, the territorial contexts of destinations, stakeholder opinions and regional strategies.

To achieve the best results, the ESPON TOURISM methodology should be employed at local / regional levels within the country. The most appropriate governance level at which local overtourism can be managed, is the level that encompasses a group of municipalities (not going to the level of touristic interest areas nor tackling these aspects at a macro level). In the case of large cities, for instance, the city level might be too macro, hence measures could rather focus on specific sectors that are more affected by tourist flows.

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<sup>3</sup> John Ebejer. 2020. *Case Study 1: Overtourism in Valletta Reality or Myth?*. [https://doi.org/10.1007/978-3-030-42458-9\\_7](https://doi.org/10.1007/978-3-030-42458-9_7)

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Based on the discussions during the ESPON peer learning workshop, it can be concluded that penetrability /for the adoption of the solution in question:

- The measurement of tourism capacity in Malta should be broken down into smaller territories and be conducted preferably at local / regional levels (e.g city or groups of smaller municipalities) for a more precise overview and, consequently, better targeted solutions for carrying capacity management;
- A coordinated effort and increased articulation between various policy decision-making levels and bodies (both vertical - e.g. national/regional/local - and horizontal coordination – e.g. inter-sectorial, inter-municipal) is required to identify tourism carrying capacity in the country and devise carrying capacity management strategies that can respond to regional/local needs;
- Stakeholder involvement in both carrying capacity measurement and management should be promoted. Key stakeholders possess a deep understanding of the destinations and may have an active role in contributing to the sustainable management of carrying capacity (e.g. the hoteliers can foster sustainable transport modes of tourists for their visits to touristic hotspots, reducing thus the environmental burden).

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Rebuilding tourism numbers without restoring / multiplying the pre-Covid19 tourist flows, requires a paradigm shift in the Maltese tourism development. As part of its long-term strategy, Malta thus aims to reposition itself as a quality destination offering high-quality products and services and a differentiated experience to visitors, and through this, attracting diversified groups of tourists and generating a higher tourism expenditure per capita overall. For this quality shift to take place, the digital transformation of the tourism sector is indispensable. To accelerate digitalisation, the investment in digital technologies by tourism small and medium-sized enterprises (SMEs) and the upskilling of tourism industry players (throughout the entire value chain) will be necessary.

The pandemic also made it clear that digital skills and the ability to effectively master online digital tools are essential in helping countries to recover and become more resilient to different crisis. Recognising this need, the UNWTO has established programmes to promote digitalisation, digital skills, and the usage of new and innovative technologies in the tourism industry. These programmes are open to tourism decision-makers (UNWTO & Google Acceleration Programme), SMEs (UNWTO Digital Futures for Tourism SMEs Programme), and all types of tourism stakeholders (Tourism Online Academy), therefore, catering to the needs of Malta concerning offering capacity-building for the entire value chain.

Two of these capacity-building programmes are particularly interesting for the context of Malta. The UNWTO Digital Futures for Tourism SMEs Programme is targeted at SMEs and in Malta a significant portion of the organisations operating in the tourism sector are smaller businesses. In 2018, 65% of all hospitality entities consisted of sole-ownerships or partnerships, and 93% were micro-organisations with fewer than ten employees<sup>4</sup>. Smaller organisations tend to lack resources and may struggle to remain up-to-date about the digital transformation of the tourism industry and the opportunities digital technologies can open for tourism businesses. They also need a better understanding on how to grasp the digital opportunities, how they can lower costs, attract more visitors, improve customer satisfaction, among others, with the help of digital instruments.

The other programme with high relevance is the UNWTO & Google Acceleration Programme as tourism decision-makers equally require a deeper understanding on digital technologies and how these can be best exploited for better tourism planning and management.

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<sup>4</sup> Gordon Alistais Agius & Hillary Victoria Briffa. (2021) *Tourism and COVID-19 in 2020: The case of Malta as a small state*. Small States & Territories, 4(1), pp. 75-104

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Based on the discussions during the ESPON peer learning workshop, it can be concluded that for the penetrability/ adoption of the solutions in question:

- Increased awareness raising towards the tourism industry stakeholders is required about the ongoing digital transformation of the tourism sector, the importance of grasping digital opportunities to remain globally competitive, as well as about the available capacity-building programmes (including the UNWTO capacity-building offers) for upskilling tourism stakeholders;
- The set-up of dedicated financial assistance is indispensable by Maltese tourism decision-making bodies to create conditions and support the engagement of tourism industry stakeholders in training programmes on digital technologies (including the UNWTO capacity-building offers). This will also enable the inclusion of smaller tourism stakeholders with reduced financial resources, ;
- Exploring partnerships between the Maltese policy decision-makers and/or industry representatives (e.g. Malta Tourism Authority, The Malta Hotels and Restaurants Association, The Malta Chamber of Commerce, Federated Association of Travel and Tourism Agents) and the UNWTO may be beneficial as it may increase the Maltese participation in the UNWTO training programmes and may eventually result in customised UNWTO capacity building/support for the acceleration of digital transformation in Malta.

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One of the EU's major concerns is reducing its carbon footprint by 55% by 2030 compared to 1990 levels<sup>5</sup>. As mentioned in the workshop, the tourism sector is considered one of the most polluting sectors worldwide, being responsible for nearly one-tenth of the world's CO<sub>2</sub> emissions<sup>6</sup>. Environmental sustainability, therefore, has become a priority of the Malta's tourism industry. It was also referred during the workshop that Malta outperforms all other examined cities in regard to the change in the water consumption correlated with the change in the tourist arrivals, meaning that tourism activity substantially changes the consumption patterns on the island, having an extraordinary impact on the environment. Part of the sustainability transition are energy-saving, more sustainable energy usage and circular economy practices. The portfolio of environmental sustainability RDI initiatives showcased at the event (shortly introduced in section 3) presents several energy-saving and waste management solutions, especially relevant for the hospitality sector with potential applicability in Malta.

Some of the RDI solutions derived important conclusions which are shortly summarised below:

- Hotel retrofitting on a large scale is both technically and economically possible. For this, there are several technological options accessible;
- Large-scale retrofitting and deep energy renovation greatly contribute to energy savings that can range between 60-80%;
- Extensive refurbishment may augment the market value of the properties to the point that it can surpass the initial investment expenses.
- Renovations and energy efficiency investments in hotels should be done step-by-step and start with the low-cost measures and the ones that bring immediate return on investment;
- The application of energy efficiency technologies on their own is not sufficient to achieve nZEB. The change of user behaviour is an important parameter to maximise the potential of the technological solutions and thus minimise the energy usage / sustainable energy use;
- Energy savings are not sufficiently motivating for hotel owners to perform deep energy renovations towards nZEB or Zero Energy Buildings (ZEB) and thus such interventions should also result in non-energy benefits.

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<sup>5</sup> European Commission. 2021. *European Green Deal: Commission proposes transformation of EU economy and society to meet climate ambitions*. Available at [https://ec.europa.eu/commission/presscorner/detail/en/IP\\_21\\_3541](https://ec.europa.eu/commission/presscorner/detail/en/IP_21_3541). [Accessed 6 June 2022]

<sup>6</sup> Daisy Dunne. 2018, May. Tourism responsible for 8% of global greenhouse gas emissions, study finds. *Carbon Brief*. <https://www.carbonbrief.org/tourism-responsible-for-8-of-global-greenhouse-gas-emissions-study-finds/>



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Based on the discussions during the ESPON peer learning workshop, it can be concluded that for the penetrability/adoption of the presented RDI solutions:

- Awareness-raising on sustainability themes towards tourism stakeholders (including energy efficiency and other intervention areas) should be enhanced. Policy decision-makers together with key agencies in charge of promoting tourism industry development (e.g. industrial associations and business agencies) may have a central role in such a campaign;
- Financial incentives and support schemes should be designed and rolled out with the objective to fund /co-fund tourism stakeholders' investments in energy efficiency;

Tools, methodologies, practices and technologies resulting from environmental sustainability related RDI initiatives should be widely disseminated to the tourism industry. Tourism industrial associations (e.g. The Malta Hotels and Restaurants Association, Federated Association of Travel and Tourism Agents, chambers (e.g. Chamber of Engineers in Malta; The Malta Chamber of Commerce) and energy agencies (e.g. Maltese Energy and Water Agency) can play a vital role in transferring and supporting the implementation of these resources in the tourism facilities and the tourism industrial operations (e.g. The Malta Hotels and Restaurants Association launched several energy efficiency initiatives in the past years that focused on awareness raising and assisting its member hotels in achieving energy efficiency)<sup>7</sup>.

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<sup>7</sup> Office of the Prime Minister (Energy and Projects). 2017. *Malta's National Energy Efficiency Action Plan* (Energy Available at [https://ec.europa.eu/energy/sites/ener/files/documents/mt\\_neeap\\_2017.pdf](https://ec.europa.eu/energy/sites/ener/files/documents/mt_neeap_2017.pdf) [Accessed 5 July 2022]

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## **ESPON 2020**

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The ESPON EGTC is the Single Beneficiary of the ESPON 2020 Cooperation Programme. The Single Operation within the programme is implemented by the ESPON EGTC and co-financed by the European Regional Development Fund, the EU Member States and the Partner States, Iceland, Liechtenstein, Norway and Switzerland.

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