



***Autorità di Bacino Distrettuale
dell'Appennino Meridionale***

Land-Sea
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PROJECT LAND-SEA

“Sustainability of the Land-sea System for Ecotourism Strategies”

MOLISIAN REGIONAL POLICY ANALYSIS FIRST REPORT





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Summary

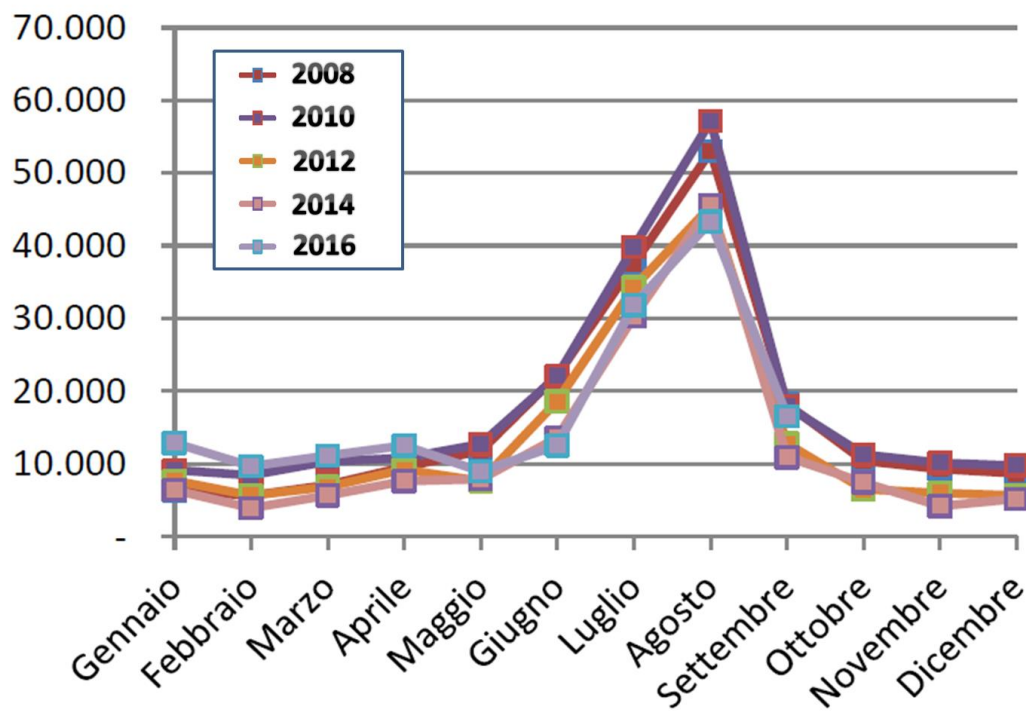
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1. CURRENT SITUATION OF TOURISM IN MOLISE

Molise, while remaining the tail-light of the Italian regions compared to the total number of arrivals and tourist presences, has recorded in the last years an average annual growth rate among the highest in the country, this demonstrating the great potentiality existing in the territory. By analyzing in detail the data shown in Figure 1, it is possible to note as, both for arrivals and for presences, the trend is positive, except for the slowdown suffered by presences in 2004. On the other hand, the average stay never exceeds, in the years since 1998 to 2004, the 4 days.



It is evident how the Molise coast holds the leadership in terms of arrivals and presences however, while this registers a negative trend since 2002 onwards (above all for the loss of competitiveness of the bathing product, in general) the rest of the region, with small steps but with constancy, it marks important incremental variations.



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Molise presents a large wealth of eno-gastronomic excellences and significant proofs of agro-pastoral life, such as rural burgs and kilometers of grass ways, the Tratturi.

Molise has adopted the model of the Ecomuseums (l.r. 11/2008) and promoted the “Albergo Diffuso” project in the burgs.

In particular, with the Regional Law 7/2014 was established the formula of the Albergo Diffuso to promote the development of sustainable tourism in all its forms.

However, Molise is affected by basically seasonal tourist flows and concentrated in summer season. The offer of tourist services and hospitality is mainly concentrated along the coastal strip. In urban areas (enterprises's register 2014) are present 44 of receptivity enterprises (22% of total), 19 of which in Campobasso, 17 in Termoli and 7 in Isernia. On 11,435 beds in total, equal to 0.2% of national ones, almost 80% is located in the province of Campobasso and in the coastal municipalities.

The accommodation offer is not adequately developed, with a presence, in 2012, of 36.4 beds per 1,000 inhabitants, compared to an average South Italy area of 58.9 and to an Italy's value equal to 80; the region is on the penultimate place at the national level.

The tourism sector, therefore, presents a limited employment impact; in 2012 only 4.2% of employed persons worked in the tourism sector, in line with the European data, but lagging behind the nationally registered impact of 5.3%.

From an environmental point of view, the region is affected by areas of particular importance. There are:

- the Protected Natural Areas (1.52% of the regional area):
- 1 National Park of Abruzzo Lazio and Molise (Mainarde Sector);
- 2 Oasis (LIPU of Bosco Casale and WWF of Guardiaregia);
- 4 Natural Reserves, of which three at National (Collemuccio, Montedimezzo and Pesche) and one at Regional level (Torrente Callora).



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The reserve of Collemuccio-Montedimezzo has been extended to the whole territory of the seven municipalities that are part of the ASSOMAB consortium, an important recognition by UNESCO closed the world network of uncontaminated areas. Part of the above mentioned protected areas affect the urban area of Isernia (3.5% of the territory). For the Natura 2000 Ecological Network, 85 Sites of Community Importance have been identified (22.4% of the regional area) and 14 Special Protection Areas (14.7% of the regional area), of which about 50.000 have been transferred to Habitat. The Natura 2000 areas affect urban areas in the following measure: Campobasso 2.1% of the territory; Isernia 27.5%; Termoli 10.4%.

The Molise territory is endowed with two important archaeological poles [Pietrabbondante and Altilia Sepino] and significant architectural assets and it still needs interventions for the enhancement of cultural heritage.

Only 9 are the State Institutes of antiquity and art (data of 2011) and 34 Institutes non-state ones, of which 21 were located in the province of Campobasso and 13 in the province of Isernia. Multiple (beyond 100) are the buildings of historical interest (of religious and non-religious origin) present in the urban areas. Moreover, these boast 12 "minor" archaeological sites (2 in the area of Campobasso, 4 in the area of Termoli and 6 in that of Isernia) and 7 museum complexes (2 in Campobasso, 2 in Termoli and 3 in Isernia).

The weight of private operators in the cultural sector in Molise stands at 0.5% of cultural enterprises nationwide, with a contained level of sector employees, whose percentage share of total employment stands at 1.3% compared to the average for Mezzogiorno (1.6%) and Italy (1.7%). In urban areas (business register 2014) about 50% of operators are concentrated (415 companies in the Campobasso area, 320 in the Termoli area and 160 in Isernia, for a total of 895).



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The largest number of active enterprises are the sectors related to agriculture, forestry and fishing (24%), trade (23%), construction (12%) and accommodation and catering (8 %); then all others follow.

The indicator represents an economic varied reality in which the enterprises linked to tourism, sector as we will see privileged in the strategic choices of the Urban Area, show good values. If however we deepen the study, crossing this data with the analysis of turnover, it is evident that the "accommodation and catering" sector, a key driver for tourism development, loses several positions to the detriment of other sectors, more productive in general terms. Moreover, if the per capita turnover of the individual economic initiatives is calculated, the sector is even in the penultimate position, with a value of 17,873 Euro of average revenues per active company. However, this data suffers from non-small distortions deriving from the submerged economy, which reaches its peak in the summer. One of the objectives of the urban strategy is, therefore, the design of specific incentive tools for companies in the tourism sector that are aimed at reducing the undeclared and promoting initiatives aimed at the deseasonalization of activities.

Analyzing the data on the birth and termination of companies, as regards in particular the only reality of Termoli taken for example for the territory of the Urban Area, it emerges that the number of new companies registered in the Chamber Register in the municipality was equal, in 2014, to 248 units, compared with 228 terminations. The birth rate is 7.1%; the mortality rate is 6.6%, a decrease compared to the previous year (-2.2 points). The values recorded show, for the municipality of Termoli, a greater entrepreneurial dynamism compared to the regional average (birth rate of 5.6%).³ From a structural point of view, the distribution of economic activities in the territory of Termoli shows some peculiarities with respect to the economic context of the region: observing the sectoral distribution of the local units on the total sectors taken into



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consideration (Istat census 2011), the data show an industry weight of 27.1% in the municipality of Termoli (compared to 22,8 for the Molise region); a total of 34.6% of services (compared to 35.3% registered at regional level); a value of the percentage of commercial enterprises equal to 35.1% (33.8% the regional figure). The institutions are present in the municipal area with a number of 3.3% (the regional average is 8.2%). Compared to the total, the number of companies active in agriculture is marginal (the farms of Termoli are 1.7% of the total number of farms in Molise).

The historical series relating to the number of companies in the tourism sector located in the territory of the AU in the last decade shows, with the exception of 2015, a constantly increasing trend (with an overall increase of 31.36 % recorded between 2005 and 2016).

This figure takes on significance when compared to the total number of companies, which remained almost identical during the period under review.

In relation to public services supporting innovation, it should be noted that the Urban Area of Termoli hosts a branch of the Università degli Studi del Molise that offers the following degree courses:

1. Degree course in Tourism Sciences, with addresses "Tourism and Local Development" and "Eno-gastronomy and Tourism" (inaugurated in 2016);
2. Master's Degree Program in Tourism Management and Cultural Heritage (inaugurated in 2017).

Termoli, the main center of Molise overlooking the Adriatic, enjoys an entrepreneurial structure that has one of the main elements of interest in tourism. The sector, in fact, represents an important voice for the economy of the Basso Molise, in the context of which the City plays a role of flywheel and attractor. Support for the tourism economy is therefore a priority need for the entire AU. It is necessary to consider that, in general, the market registers a progressive diversification of the demand: once the figure of the



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"holiday maker" has been set, the tourist is today constantly searching for novelties, original destinations, adequate services and infrastructures.

The urban tourist offer system is identified as a widespread system, concentrated mostly on the territory of Campomarino and Termoli, but too often unstructured and inhomogeneous, failing in a systemic way to establish itself with a strong and recognizable identity in the scope of a national and supranational catchment area: a system historically exposed to competition. In this context, the planning strategy aimed at affirming and promoting a differentiated tourism offer should be developed, hinged on the enhancement of the natural, landscape, environmental, eno-gastronomic, historical and cultural heritage of the area.

The quantitative analysis of the tourism phenomenon in the Urban Area is affected by the difficult availability of official data especially in relation to the Campomarino flows, a municipality characterized by a very peculiar offer based on the second houses system often used directly by the owners or their family members and friends. According to a cadastral analysis provided by the Municipality, it is clear that about 70% of the 11,000 housing units falling within the municipal area are made up of second houses or holiday houses.

This situation and the lack of classical accommodation facilities (hotels, residences, b&b, etc.)⁶ does not facilitate the formulation of official statistics on arrivals and presences, although indirect estimates lead to the hypothesis of an increase in population in the municipality over ten times in the months of July and August.

The availability of more structured data allows a more detailed analysis of the Municipality of Termoli, as shown below. Against a situation of substantial maintenance of national market shares (with an increase in domestic ones) from the most farsighted local systems that have known how to re-engineering its own tourism proposal (this is the case of the most attractive destinations, primarily Rimini, but also minor seaside resorts), there seems to be an awareness of the need for change for most of the Adriatic



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coast's seaside resorts that continue to show up on market with an offer now outdated. Termoli, on the basis of its intrinsic potential, faces a new challenge: overcoming the monofocusing of the product and exploring new targets and tourist markets.

The tourist-type who chooses Termoli as a holiday destination is, mostly Italian, often resident in the neighboring regions (with the exception of the Lombards) who moves for holidays with the family.

Generally, the choice of Termoli as a holiday destination is made almost exclusively on the basis of suggestions and invitations from relatives and friends. This evidence shows that informative channels are informal and, therefore, Termoli, and more generally Molise, is effectively excluded from the classic commercial channels (Il Molise is not sold in the catalog!).

On the basis of the numbers recorded by the various regional tourist offices, it is easy to see that the tourist flows concentrate mainly on seaside tourism, so much so that the coast attracts the majority of travelers who choose Molise.

As a consequence, there is a high seasonality of demand (see Graph 4) which, as is known, produces problems of environmental, social and economic sustainability.

In 2015 the total number of arrivals and presences is respectively equal to 46.725 and 186.022, with an average stay of approximately 4%. Of these, 41,025 are the arrivals of Italian tourists and 161,438 the number of their attendance, with an average annual stay of 3.94%. While, in relation to foreign tourists, 5,700 are arrivals and 24,584 presences, with an average stay of 4.31%. The figure that emerges is that foreign tourists are still very few compared to the Italians who prefer Termoli as a tourist destination, but stay for longer. Eventually, as mentioned, there is a decrease in arrivals and presences in the spring and summer months (May to August) of 2016, compared to the previous year, contrary to what was recorded, in the months of January, February, March and April.



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We must highlight some interesting positive signs, such as the receptive size that has been enriched with new structures, especially extra-hotel, replacing part of the offer of beds provided by hotels now obsolete and out of the market. According to recent data available, it emerges that the Adriatic resort has a total accommodation capacity of 1,840 beds, destined to increase by 2018, the year in which it is planned to open a new extra luxury facility on the north seafront.

It should also be remembered that the official figures are added to the numbers, not statistically recorded, relating to the use of rental homes or second homes that, however, represent a substantial portion of the tourism movement.

Despite these signals, there remain critical issues related to the overall availability of beds that add up to those, even more important, of **absence of planning and definition of competitive tourism products**.

Among the opportunities for the sector are: the imminent reorganization of the port of Termoli (through the port regulatory plan, the redevelopment of the three squares on the sea and the development of the airport to intercept new tourist and commercial flows); the renewed effervescence of the tourist brokerage sector, which saw the birth of various travel agencies (many of which specialized in incoming); the dissemination of territorial animation services provided, for example, by tourist guide associations.

Another strong point can be represented by the **generational transition** underway in the Thermolian receptive system made up almost entirely by small and medium-sized family businesses. This phenomenon can be an advantage if we consider, for example, the greater familiarity of the new generations in the use of more sophisticated management techniques and tools, as well as the availability of a more qualified knowledge base (linguistic, informatic and relational).

Among the cross-cutting initiatives carried out by local institutions, we note the adhesion of Termoli to the "Aalborg Charter" (in 2008) and to the National Coordination of Italian Local XXI Agendas. The Municipality has also joined the national circuit of the



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"Città del Bio" (Association of Municipalities and Local Authorities that promote Organic Agriculture).

With regard to the effectiveness of environmental policies, it should be noted that, in addition to being awarded the Blue Flag for years, in 2009 the Municipality received the "Comuni Ricicloni d'Italia" award, conferred by Legambiente and the Conai (under the patronage of the Ministry of the Environment) for the separate collection service and for the strong sensitivity on the theme of recycling.

Termoli, gradually, is laying the foundations for a more sustainable future for its residents and visitors.

With reference to the analysis of the Region System, and in consideration of the ongoing crisis condition that has reduced investment capacity and has oriented towards conservative options the planning policies 2007-2013, for the 2014-2020 cycle, Molise expresses, with reference to the OT of which art. 9 of the Reg. CE n. 1303/2013, the following investment needs:

- "Strengthening research, technological development and innovation" - OT1;
- "Improve access to information and communication technologies, as well as the use and quality of the same" - OT 2;
- "Promoting the competitiveness of small and medium-sized enterprises, the agricultural sector and the fishery and aquaculture sector" - OT 3;
- "Supporting the transition to a low carbon economy in all sectors" - OT 4;
- "Protecting the environment and promoting the efficient use of resources" - OT 6;
- "Promoting sustainable and quality employment and supporting workers' mobility" - OT 8;
- "Promoting social inclusion, combating poverty and all forms of discrimination" - OT 9;
- "Investing in education, training and vocational training, for the skills and lifelong learning" - OT 10;



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- "Strengthening the institutional capacity of public authorities and stakeholders and an efficient public administration" - OT 11.

In the context of the ESF regional strategy specifically related to the OT8 and 10, the valorisation of the Natura 2000 benefits become important, consistent with the objective of consolidating and supporting in particular the employment and competitiveness of businesses that are specifically present in tourist destinations, in order to provide the qualitative improvement of the offer and the competitive repositioning of some territories in the agriculture and tourism sectors.

The training initiatives, aimed at employed and unemployed, scheduled in the OT10 will take into account the needs of the regional productive sectors including those of the so-called "blue economy". Actions should aim at ensuring maritime employment through labor mobility between the sea-related sectors and between land-based and sea-based jobs, by enhancing the high levels of qualifications between traditional and emerging maritime sectors, including those related to maritime and coastal tourism.

According to the Smart City Index of Between 2014, in the national scene, the Molise region capitals, Campobasso and Isernia, take on positions of particular digital backwardness, occupying respectively the 98th and the last (116th) position of the ranking. The gap inherent in Smart Health, Mobility, Government, Culture & Travel services is particularly large (over 100 per position for both); Smart Security and Smart Justice are lagging behind the city of Isernia. The only positive exception, shared by the two capitals, concerns Smart Education (13th and 27th position).

The state of implementation of the Digital Agenda of Molise is summarized by the following indicators, updated in Rapporto Italia Connessa 2014, which, however, do not reveal the effects of the aforementioned interventions currently underway for most of the year 2013.



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- Broadband base (% families with standard BB coverage of landline): 89% (target ADE 2013: 100%);
- Fast Broadband (% families with BB Ngran coverage): 0% (obiettivo ADE 2020: 100%);
- Regular use of internet (% of people who use internet regularly): 47% (target ADE 2015: 75%);
- No internet use (% of people who do not use internet): 51% (target ADE 2015: 15%);
- Access information e-Gov (% people who used internet to get information from the PA): 10% (target ADE 2015: 50%);
- Forms forwarding e-Gov (% people who used internet to send forms compiled by the PA): 6% (target ADE 2015: 25%);
- e-Commerce citizens (% people who have made purchases online): 10% (target ADE 2015: 50%);
- e-Commerce enterprises (% enterprises 10 + employees who have made purchases online > 1% purchases): 13% (target ADE 2015: 33%);
- e-Commerce enterprises (% enterprises 10 + employees who have made sales online > 1% purchases): 3% (target ADE 2015: 33%).



2. TERRITORIAL AND SECTORIAL PLANNING POLICIES

2.1. Territorial and urban planning

Molise with an area of 4,438 km² records one of the lowest population densities in Italy: 70.7 ab / km². The mountain municipalities are 90% of the total and 70% of the population live there compared to a national average of 20.2% and 22.4 of the EU to 27.

The average size of the Municipalities is just over 2,300 inhabitants, with significant dispersion of the population on the territory; out of a population of 319.101 inhabitants, equal to 0.52% of the national population, only 33% of the total resides in the Municipalities of Campobasso (48.747), Termoli (32.793) and Isernia (22.025).

The remaining population (around 215,000) is parcelled out in the other 133 municipalities in the region.

This condition varies moderately if the urban area qualification extends to the 7 municipalities immediately adjacent to the major centers: in this case, in fact, the demographic weight rises to about 40% (urban area of Campobasso: 55.006; Termoli 46.720; Isernia: 24.666). The senilisation of the population is one of the most significant phenomena of the last decades. The old age index, according to the latest census, rose from 148.4 in 2001 to 178.1 in 2011 with a greater incidence in the province of Isernia (191.9) compared to the province of Campobasso (173.2). With reference to the DPS Internal Areas - Centers classification, it is evident a depopulation phenomenon in the internal areas because, as compared to the 2001 census, there is a change from 145.458 units to 133.985 units (2011 census) with a negative trend of 7,89%. On the other hand, in the centers there is a population increase of 2,59%, from 175.143 units in 2001 to 179.675 in 2011. In relation to the population aged 0-14 years, in the period 2001-2011 in the internal areas there is a negative trend of -21.84% while for the centers the trend, however deficitary, is equal to -9.75 %. The surveys carried out by the DPS classify the



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regional territory as a reality with a predominance of peripheral areas; 25% of the municipalities are included in the macro-class of the Centers, compared to 75% of the municipalities classified in the Internal Areas macro-class.

Molise expresses an economy that is not sufficiently inclined towards innovation, with an openness to the outside that is not entirely satisfactory, not particularly brilliant in terms of creating wealth and job opportunities and supported by the consumption of exogenous resources. The Istat surveys for 2012 show a contraction in regional per capita GDP levels of -2.3%, among the most significant at national level; this decline continues the negative trend of recent years. The downward trend of the general indicator of productivity Added value at base prices for ULA in 2012, equal to 42.5, shows a non-performing production system that is not yet sufficiently permeated by the sectors with the highest intensity of knowledge and greater added value.

In Italy, the unemployment rate has risen sharply, rising from 12.8% in the first quarter of 2013 to 13.6% in the first quarter of 2014. In Molise this figure was more significant; according to the ISTAT 2014 surveys, if in the fourth quarter of 2011 the percentage of the unemployed population stood at 10.4%, in the first half of 2013 this figure was equal to 16.3%, reaching 16.4% in the first half of 2014. As far as the number of businesses is concerned, the presence of companies per thousand inhabitants reaches 58.6, - value Mezzogiorno 51.8 - not too far from the Italy figure of 63.8%. However, the average number of employees of the companies is limited, equal to 2.6 in 2011, lower than the Mezzogiorno (2.8) and the Italy (3.9) data (Noi Italia, ISTAT). The number of companies in the period 2011 decreased by -0.8%, in line with the South (-0.9%) and Italy (-1.1%) figures. The level of exports decreased by -6.1% in 2012, against a growth recorded both in the Mezzogiorno (7.8%) and at the national level (3.7%). The value of exports of goods to GDP in 2012 fell to 5.9%, compared to a national figure up by 24.9%.

Positive features can be seen in the composition of exports, which shows a an important and increase in the incidence of exports of products with dynamic global demand, a sign



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of a partial and prospective emancipation of the production system from the traditional mature sectors. Gross fixed investment in% of GDP from 2006 to 2010 fell significantly, from 28.4% to 21.7%. These elements, together with the net dependence from the outside (given by the increase in net imports as a percentage of GDP, which reached 19.3% in 2011 compared to the national figure of 2.3%) show a worrying fragility of the regional production system.

In line with the provisions of the ROP ERDF ESF Molise 2014-2020 on the subject of Urban Areas and in implementation of the DGR n. 56 of 24/02/2016, this document refers to the territory called "Urban Area of Termoli" comprising the Municipalities of Termoli, Campomarino, Guglionesi and San Giacomo degli Schiavoni.

The URBAN AREA thus delimited, later also referred to simply as AU, has in Termoli the leading Commune as the reference territory of the entire area, from an economic, demographic and social point of view.

The territory of the Urban Area occupies an area of 244.35 square kilometers and records a density of 217.76 inhabitants per square kilometer, much higher than the regional one (70.7 ab / kmq) which is one of the lowest in Italy.

The total population of the urban area, equal to 48.178 inhabitants in 2015, is distributed between Termoli (33.739 inhabitants), Guglionesi (5.321 inhabitants), Campomarino (7.712 inhabitants) and San Giacomo degli Schiavoni (1,406 inhabitants).

In the past the territory of the Urban Area, included in a coastal stretch between the rivers Fortore and Trigno, included two different ecosystems, marine and terrestrial, constituting a transition zone between land and sea with a continuum of vegetation in which dune systems coastal areas covered with Mediterranean herbaceous species, typical of sandy coastal areas, coexisted with evergreen coastal woods of holm oaks and small coastal lakes.

With the passage of time, the progressive anthropization has led to the metamorphosis of the environment: **the great reclamation works, the wild urbanization, the river**



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regulation with the consequent progressive erosion of the coastline and the construction of the great infrastructures (railway, highway, highway) have broken the ancient natural balance and the original landscape has assumed the current appearance.

Even today, however, along the interfluvial coast, the original environment of coastal dunes, coastal forests and Mediterranean spots survives and is preserved, especially in the territory of Campomarino, where there is a substantially intact ecosystem. The challenge is to put strategies in place to preserve this integrity.

The Molise coast presents a great diversity from the environmental point of view: sandy coasts and dune fields alternate with the mouths of the main regional waterways. From these develop a series of important ecological corridors towards the hinterland.

As will be better explained below, the basic idea of this document revolves around the enhancement of the entire "**Costa dei Delfini**" which, by involving coastal stretches belonging to different adjacent municipalities, requires programmatic, material and immaterial interventions, which generate virtuous paths of economic and tourist development, coherent with the national coastal zone development strategy.

About two-thirds of the entire Molise coast are included in Sites of Community Interest (SIC). The three SICs, identified as part of the BioItaly project, based on the D.M. 25 March 2005, pursuant to Directive 92/43 / EEC, are:

- 1) Foce del Trigno - Marina di Petacciato (IT7228221) falling within the territory of the Municipalities of Montenero di Bisaccia, Petacciato and Termoli;
- 2) Foce del Biferno - Litorale di Campomarino (IT7222216) falling within the territory of Termoli and Campomarino;
- 3) Foce del Saccione - Reclamation Ramitelli (IT7222217) falling within the territory of Campomarino.



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The "Foce del Biferno - Litorale di Campomarino" SCI (IT7222216) covers 816.93 ha along the coastal sector, close to the Biferno estuary and includes the entire Campomarino coastline. The Natura 2000 sheet thus describes the site "By its very nature, the area of contact between the fluvial and marine environment with the resulting vegetation aspects. The site, in particular, has a large number of habitats typologies typical of the coastal environment that have a good degree of conservation and representativeness. It is a staging area for a considerable ornithofauna and the river environment is also important for the ecology of *Emys orbicularis*". The card also identifies a high vulnerability of the site due to the presence of discharges of urban centers, without adequate facilities for the purification, and the numerous tourist sites. In addition to the presence of the marsh turtle (*Emys orbicularis*), classified in the sheet between the "Animal and plant species of Community interest requiring strict protection", the presence of the solitary hermit (*Osmoderma eremita*), an invertebrate at risk of extinction. This SCI has extremely interesting naturalistic aspects, on which however the anthropic impact weighs heavily on the protected ecosystems. The dunes of Campomarino constitute a nesting environment especially for the Corriere Piccolo (*Charadrius dubius curonicus*) and for the Osprey (*Pandion h. Haliaeetus*).

All the SIC in the Molise Region, with the exception of the three that concern the River Fortore and the Lake of Occhito, do not have a Management Plan, a tool to protect the habitats and conservation of the species in line with the socio-economic factors that insist in the local area.

Another important aspect to frame the territorial context is linked to agriculture: the whole area has always had a strong agricultural connotation and many cultural and social traditions are linked to this specificity.

Today the agricultural production is concentrated mainly in the area of Guglionesi and in part of that of Campomarino, having the other two municipalities of the Urban Area



known a development of the territory much more linked to industry and services, especially logistic and tourism. Following is a diversified historical, demographic and cultural analysis for the four different municipalities that make up the Urban Area.

2.2.Strategic tourism plan

On the tourism front, there are still potentials that are not adequately exploited, especially in terms of the competitive effort of the various segments: seaside and coastal, which, according to available estimates, absorbs 50% of the presence of the entire Molise region; nature and landscape (lakes, woods, environmental oases, parks); widespread rurality, history and culture (just think of the numerous examples of Romanesque art, the castles, the richness of the craft traditions of master organs, watchmakers and cabinet makers).

Further undoubted potential are represented by a favorable social climate, deriving from the absence of organized crime phenomena; a "quality of life" strongly linked to the values of tradition, nature and rurality that make the area particularly attractive for new entrepreneurial initiatives and a good propensity to invest in the local productive fabric.

Based on the context conditions described in the previous paragraphs, the general objective of the Termoli AU strategy is focused on three areas of intervention: mobility, environment and culture.

Mobility is a crucial aspect for the urban area as it is conditioned by several factors:

- ⊗ Termoli with its urban environment is characterized by being a preferential access point to the territory of Molise from the east, thanks to the presence of road and rail axes;
- ⊗ the coastal industrial pole determines the concentration of important quantities of goods and people on the territory of the area;



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© the attractiveness exercised, particularly in the summer period, towards regional and extra-regional tourists, creates further concentrations that often put the local transport and mobility system in crisis.

This last circumstance produces the major problems of livability and use of urban services, making it essential to intervene on the development of independent and sustainable transport systems based, for example, on cycle and pedestrian paths, capable of decongesting the territory and improving its use in synergy with other interventions foreseen by the programmatic lines of the local administrations. The **Urban Mobility Plan** that the municipalities of the Area undertake to adopt by the end of 2017 will report the guidelines for the transition to sustainable urban mobility. In order to give an overall picture of the projects currently in progress in terms of mobility, a summary of the actions to improve the various infrastructures and existing mobility systems is proposed below, with particular reference to the Municipality of Termoli.



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Strengthening of network logistics and material and immaterial mobility.



Completion of the N-O / S-E guideline as a strategic communication axis along the AU coastline



Enhancement of crossways access to the N-O / S-E route to bring the hinterland closer to the coast



Development of an integrated and congruent parking system with local mobility



Progressive reduction from vehicular traffic in the nineteenth-century city in favor of pedestrian areas

Cultural activities represent a vital aspect for any social reality, in the absence of which all the other human and economic spheres would not find a real completion. The Urban Area of Termoli can count on a vast set of cultural resources, such as the buildings of worship and their treasures, the centers of education, training and specialization, art collections, museums and universities, unique material and immaterial traditions and assets, too often not valued. The activities to be implemented through the implementation of the strategy will involve the cultural aspect in different ways, given the potential of the sector and the needs of the territory, also in terms of tourist attraction. In this direction it is addressed the exploitation of the dynamism of local associations and third sector organizations, often interested in managing places of social aggregation with a cultural matrix;

enhance the eno-gastronomic and folk heritage, substantially intact; to recover, from a social and tourist point of view, the memory that saw the Molise coastal area, protagonist in the last century, in the definitive turn towards the conclusion of the German occupation and the war hostilities.

2.3 Key Interventions

In the context of the integrated development of the Urban Area of Termoli it is necessary to take into consideration some definable "pivotal" interventions that have multi-sectoral repercussions. As will be clarified below, significant initiatives are planned to create new spaces and innovative forms of management of areas that have been too depressed for too long, especially through a general rethinking of mobility and the organization of central infrastructures.

- **Coastal network for sustainable mobility: the "Via Nova del Mare" with transversal ecosensible axes**

At the base of the development of the coastal area of Molise is the project of the "Via Nova del Mare" (along the Costa dei Delfini), a light infrastructure able to support the development of marginal areas and redevelop the degraded areas, as well as provide new services and opportunities for recreation.

This is a complex project that consists of several interventions, some of which are shown below.



Figura 2: La via Nova del Mare lungo la “Costa dei Delfini”



- **Projects in the municipality of Termoli.**

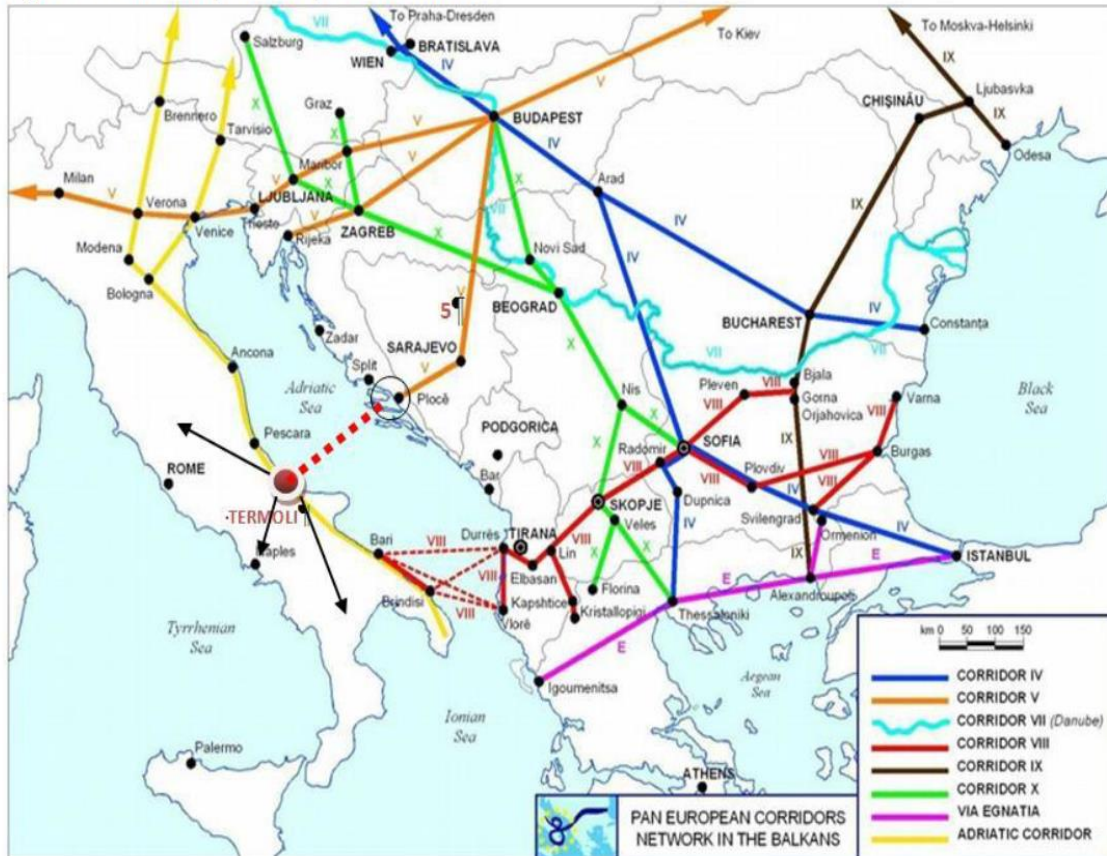
The major interventions to be carried out in the territory of Termoli cover the objective of designing a "Strategic development plan for the Molise coast" capable of triggering territorial development processes with strong characteristics of eco-sustainability and environmental protection. Some of these interventions are only in the planning stage, others in full execution. With the new port, Termoli, taking advantage of the privileged geographical context compared to other Italian Adriatic port cities, will be able to seize good development opportunities in the near future as part of the maritime traffic growth process in the current Euro-Mediterranean scenario.

In fact, just under 130 miles from the port of Termoli, lies the port of Ploce, which is part of Croatian territory but represents in all respects the outlet to the sea of the economy of Bosnia and Herzegovina and, in general, of the Balkan hinterland.



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Figura 5: Corridoi paneuropei nei Balcani



Su Ploce attests the "Branch C" of Corridor V, which is the axis that connects Venice - Trieste / Koper - Ljubljana - Maribo - Budapest - Uzgorod - Lvov (Kiev).

Branch C, with a North-South orientation, starting from Budapest and passing through Hungary and Bosnia-Herzegovina, connects the central part of Europe with the Adriatic Sea right in the Croatian port of Ploče. Mainly on this route, as well as on that of the corridor VIII, a good part of the development opportunities for Molise maritime transport will be concentrated in the near future.

In this context, the possibilities of developing commercial and passenger traffic to Split, Ploče and Dubrovnik are of great importance. Of particular interest is the prospect of



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improving services for passengers only, which, from Termoli, mainly during the summer, can head towards the nearby Croatian islands.

In the hypothesis of a 2006 study entitled "Gate on the East", still very timely and interesting, the establishment of an eventual entry into service of the Termoli - Ploce line would allow a 20% increase in total maritime traffic (alternative to the road) to and from Croatia (with a potential attraction of about 45% of the maritime traffic with Croatia currently attested in the ports of Ancona, Termoli and Bari). In absolute terms, the study **"Porta ad est" evaluates the traffic potential of the Termoli - Ploce line in about 330,000 t / year, with annual growth rates of 4-5%.**

At the planning and content level, the PR of the new port is developed according to some main strategic lines:

1) the port infrastructure is designed in multi-functional terms. In it coexist more types of activities and, in particular: commercial traffic, passenger traffic with connections to the Tremiti islands and to the eastern shore of the Adriatic, productive fishing, tourist boating, shipbuilding and moorings for public administrations.

The basin below the ancient village will be totally dedicated to urban and tourist activities with the pleasure boating and the "city on the harbor". The marina, with a total capacity of about 500 berths, would offer the possibility of accommodating large boats (maxi-yachts). On the large triangular square, moreover, a sort of "maritime village" would be built with small squares overlooking the port and animated by shops, bars, restaurants and green spaces. The surface, for this purpose available, would be about 90,000 square meters.

The PRP, in order to complete the decongestion of traffic around the port, provides for the construction of a loop link between the port area and the western part of the city. This would eliminate the bottleneck that currently "chokes" the traffic in the saddle (via Rome - via Aubry) that separates the historic center from modern neighborhoods.



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- **Projects in the municipality of Campomarino**

The Municipality of Campomarino, like that of Termoli, has developed a series of projects, some of which are under implementation and others that will be implemented in the coming years and which will have a supra-municipal value. Below is a brief description of the various interventions:

A. Promenade extension to the south: construction of a route from the center of Campomarino to the Canale delle Due Miglia, respectful of the dune habitat.

B. Bicycle lane: with this project we aim to achieve multiple objectives, urban, environmental, tourism and social.

C. Pine forest: It is envisaged the construction, within the coastal pinewood, of equipped paths and an adventure path that, in protecting the environmental good, allows its use also in order to provide support to tourism and economic activities.

D. Completion of the tourist port: The interventions are aimed at modifying the current "basin" arrangement of the entrance of the avallorto in the "converging mole" type.

E. Completion of the Sports Hall: This intervention, certainly of strategic interest for the entire region, would allow the area to be equipped with an infrastructure that can act as a support for all sporting and tourist-accommodation activities.

F. "Le Fantine" woods rehabilitation: The intervention is aimed at the redevelopment of the Bosco "Le Fantine".



2.3. Plan to foster nature tourism in Molise

Focus on the **naturalistic and environmental** issues, it is possible to note the presence in the region of an articulated plot of areas of particular importance. Among these are the Protected Natural Areas (equal to 1.52% of the regional surface) such as: the National Park of Abruzzo, Lazio and Molise (Mainarde Sector); the Oasis managed by environmental associations (LIPU Oasis of Bosco Casale and WWF Oasis of Guardiaregia) and the Nature Reserves (State: Collemeluccio-Montedimezzo and Pesche e Regionale: Torrente Callora). Moreover, in relation to the Natura 2000 ecological network, in Molise 88 Sites of Community Importance were identified (22.4% of the regional area) and 13 Special Protection Areas (14.7% of the regional area).

The coastal area of Campomarino and in particular that to the south, towards the border with Puglia, has a territory that is characterized by the Mediterranean dunes and pine forests. The area should be protected and valued in order to ensure the preservation of the ecosystem and improve the usability of the environment by citizens and visitors.

Finally, to better guide the strategic choices of the AU in relation to the entire region, consider that Molise is endowed with a vast **wealth of eno-gastronomics excellences** and significant testimonies of agro-pastoral life, including many rural villages and kilometers of grass routes that cross and characterize the territory: the "Tratturi". In this direction, Molise has adopted a model of local development based on the Ecomuseums (Law 11/2008) and has promoted the project "**Albergo Diffuso and Ospitalità nei borghi**", whose aim is the revitalization of small villages.

The Regional Law 7/2014 has, in this direction, established the formula of the diffused hotel in order to promote and qualify the **development of sustainable tourism** in all its forms and with the aim of de-seasonalizing and enriching the tourist offer; to recover the building heritage of the historic centers and villages, stimulating the economy;



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reduce land use; enhance the ancient craft skills; avoid the depopulation of small towns far from traditional tourist circuits; offer new job opportunities.

The Urban Area of Termoli is suited to this form of development, also by virtue of its potential in terms of food and wine. As an example, in the area of Campomarino are produced the Biferno and Rosso Molise DOC wines and in the territories bordering the Urban Area are produced excellences, such as the pampanella of San Martino in Pensilis and the ventricina di Montenero di Bisaccia. Furthermore, the municipalities of the Urban Area fall within the production area of the "Molise" PDO oil.

Above all, in recent years we have tried to focus on strengthening the eno-gastronomic offer, but it is certainly necessary a greater integration between the potential of the structures and those of the territory, as well as the strengthening of the whole range of services and products offered.

The interventions foreseen by the Urban Development Strategy, therefore, will take into account the possible synergies with the existing planning, aiming at the integration of the instruments and the sources of financing.

The protection, recovery and enhancement of the **environment** are fundamental aspects of the urban strategy, especially in consideration of the greater concentration, compared to the regional average, of industrial activities, infrastructures and tourist presences.

The widespread anthropization on the coast, accelerated since the mid-60s and the development of economic initiatives related to tourism during the '70s, in some cases in the absence of plans for land management, have produced a strong impoverishment of heritage environmental and biodiversity.

What remains of the environmental excellence, surveyed as areas of SIC and SPA, needs to be, on the one hand, protected to prevent its disappearance or destruction, on the other hand valued to provide green areas to serve residents and tourists.

In order to achieve these results, the Urban Authority intends to direct its development strategy also according to the following program lines:



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Develop an integrated system of parks with a high naturalistic interest, enhancing the geomorphological structure of the territory



Enhance the waterfront located at the limits of the most anthropized areas



Improve the management of fluvial and focal environments aimed at environmental enhancement and the reduction of flood risks



Strengthen energy self-sufficiency initiatives to improve the quality of life

3. CONSERVATION POLICIES

From the point of view of pressures on the environment, according to the analysis reported in the ERDF-FSE POR 2014-2020, Molise in 2005 recorded an increase in gas emissions, or tons of CO₂ equivalent per 1,000 inhabitants, equal to 57,7% compared to the values recorded in 1990, with an increase of its detachment from the Europe 2020 target. In recent years, probably also due to the crisis that has reduced the environmental pressures of a productive nature, this trend has been reversed. to pass CO₂ emissions into per capita atmosphere (tons / year) from 10.66 in 2007 to 7.8 in 2010.



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These values are also connected to the over-production of electricity and the incidence of traditional thermoelectric plants that cover 87.7% of the Molise energy needs, and require a constant supply of hydrocarbons.

In the period 2005-2011, however, the share of electricity production from renewable sources grew significantly; in fact, in 2011, the threshold of 67.4% was reached, exceeding with great margin the target set by the Europe 2020 Strategy, equal to 20% of total consumption.

The inversion of trend with respect to 2005 was possible thanks mainly to the increase in production of wind plants, which increased by 420% in the period 2005-2009, allowing an increase in the production of green energy equal to 186.1%.

Termoli, although hosting a turbo gas plant, built and managed by Sorgenia and started up in 2006 with an installed capacity of about 700 Megawatt / hour, does not present significant problems related to excessive production of CO₂. The plant represents for the Area a primary source of production and energy supply which, following a strict international management discipline, has avoided becoming a source of pollution.

At the plant, since 2007 there is an Environmental and Safety Management system in compliance with the most important international standards:

- Environmental Management certification according to the standard UNI EN ISO14001;
- Health and Safety Management certification according to the international standard BSI OHSAS 18001 (Sorgenia Spa data).

The Environmental Management System is not a protocol in itself concluded, but a process of continuous improvement, in which a fundamental step is represented by the EMAS (Eco Management and Audit Scheme) registration, a program of the European Union for the continuous improvement of the performances environmental aspects of industries and companies.



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As requested by the EMAS program, in order to obtain the Registration, specific Environmental Declarations have been drawn up and published, in which all the information concerning the various forms of impact of the plant (from atmospheric emissions to waste, to water discharges) and improvement objectives already achieved, in addition to those that we aim to achieve. Registered in 2008 with the certificate IT-000992, every year the Declaration is reviewed and verified.

Based on the data contained in the various EMAS declarations, the plant, after the first years of operation (2007, 2008, 2009) in which it worked at about 87% of its potential, coinciding with the incentives for production and use of renewable energy, saw a decrease in the percentage of production hours to reach a value of just under 38% in 2014 (with a decrease in annual CO₂ production from about 1,500,000 tons in 2008 to about 340,000 tons in 2014).

The reduction of CO₂ emissions into the atmosphere is a goal that is also formalized in the Sustainable Energy Action Plan (SEAP) that each municipality of the Area approved in 2013. Within the individual documents, the Municipalities have specified the different objectives to reduce emissions into the atmosphere through the adoption of various initiatives. The calculation on emissions reductions compared to the reference year (1990), based on the number of citizens residing in the individual municipalities, is heavily influenced by the distribution of industrial and economic activities in the area.

The Municipality of Termoli estimated, based on the scenario of the Plan, a reduction in emissions of 37.023 t CO₂ to 2020; the Municipality of San Giacomo degli Schiavoni a reduction of 178.4 t CO₂, the Municipality of Campomarino a reduction of 1.617 t CO₂ and the Municipality of Guglionesi equal to 413.4 t CO₂.

Only for physical and material interventions, for which it is reasonable to make a parametric estimate of the costs necessary for their construction, a total financial commitment of € 9.933.245.00 is made for the Municipality of Termoli, for the Municipality of San Giacomo degli Schiavoni of € 322,666.48, for the Municipality of



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Campomarino of € 1,731,121.70 and for the Municipality of Guglionesi of € 897.185,19. Through these investments we want to achieve a 20% reduction for the Urban Area compared to the emissions of the reference year (1990).

A structural element to achieve a sustainable and zero-impact growth model is the **disposal of waste and its recycling**. According to the POR Molise FESR-FSE 2014-2020 data, in the region the urban waste collected per inhabitant in the period 1996 - 2012 rose from 364.7 kg to 404.4 kg. Although growing, the regional figure is still lower than the average for the South (462.6 kg) and the Italian average (505.0 kg). The traditional methods of waste disposal remain preponderant: in 2012 the shares of waste disposed of in landfills amounted to 423.6 kg per inhabitant, higher than the average for the South (236.2 kg) and the national average (196.4 kg).

In relative terms, although increased from 2.8% in 2000 to 18.4% in 2012, the percentage of recycled waste remains low when compared to the South (26.5%) average and, above all, to the national figure (45,0%).

With regard to the **risks associated with natural disasters**, according to data from the last regional OP, Molise is the region with the highest number of municipalities with a high landslide risk. According to the risk classes, ranging from a moderate value (R1) to a very high risk level (R4), 36% of the Molise communes are located in R4 risk areas, 17% in R3 risk areas, 30% in risk areas R2 and finally 17% in risk areas R1.

In addition, 4,048 square kilometers of surface are at medium-high seismic risk (91.2% of the regional territory). The municipalities included in this area are 127 (93.4% of the total), the inhabitants are 266.328 (83.3% of the regional population) and 107.921 families (83.4% of the Molise nucleuses) 9. It should be noted that the geographical area in which the Urban Area of Termoli falls, with the partial exception of the Municipality of Guglionesi, does not present high risk factors linked to landslides, nor to seismic phenomena (low risk area).



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The hydro-geological risk is linked, in the Lower Molise, to the management of the waters of the Liscione artificial reservoir (Guardialfiera and neighboring municipalities). In 2003, for example, the abundant rainfall and a non-optimal management of the controlled release of water from the dam caused damages of about 500 million euros in the valley on the border between Termoli and Campomarino. It therefore emerges that one of the main challenges to be faced is linked to the correct maintenance and control of the infrastructures for the management of clear water flows and river courses which, in the case of extraordinary events, could create dangers for the population and damage to companies.

4. VISIONS AND TRENDS

As part of the strategic plan of the Urban Area of Termoli, we intend to develop initiatives and projects aimed at better organization and management of the territory's logistics and tourism system, integrating the use of the various existing infrastructures with the new forms of displacement designed for different users and to relocate mass tourism. A further objective is to favor the extension of the period of touristic use (currently characterized by high summer seasonality rates) and to support the companies of the Area towards sustainable development processes.

The plan therefore develops according to the strategic guidelines outlined above, trying to integrate the interventions in the various sectors or sectors considered as priorities. As mentioned, the strength of the strategy is the "**Via Nova del Mare**", a light infrastructure that leads to the creation of a network of communication routes dedicated to different forms of transport, from traditional to eco-sustainable, with the development of interchange poles and charging hubs, designed to support forms of autonomous and innovative mobility at the service of different users (citizens, businesses, tourists). On the idea of the infrastructure are then integrated integrative



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elements of development, such as the redevelopment of adjacent areas, the provision of services for the use of space, the birth and development of business projects consistent with the programmatic lines identified.

The strategic plan provides for the possibility of integrating different forms of financing (including FSC funds and direct European funds such as those foreseen by the HORIZON 2020 programs, IPA II Adriatic, InterregAdrion, Interreg Italy-Croatia) that potentially contribute to the achievement of the identified objectives. In particular, the POR FESR ESF 2014-2020 resources will be used consistently with the objectives identified in the regional planning document and in line with the strategic choices of the Urban Area (see Section 3). For example, among the interventions on Axis 4, actions are included aimed at creating intermodal exchange nodes integrated with the fundamental infrastructures; through the resources allocated to Axis 3, companies operating directly and indirectly in the tourism sector will be facilitated in order to improve their efficiency and increase the quality of the services offered; the interventions on Axis 5 will be used for the redevelopment of natural environments and historical buildings in tourism and to support local promotional processes; through the resources allocated on Axis 6, we will try to promote the raising of skills to enrich the human capital endowment of the Area, also aimed at business creation; Axis 7 will be used to support the creation of the necessary social balance in the area.

Of course, as also addressed by the application form of the Land-Sea project, the most important measure of the Regional Operative Programme ERDF/ESF Region MOLISE 20142020 is related to the Priority Axis 5. Specific Objective is the "Improvement of the conditions, supply and use standards of the heritage in the areas of natural attraction". Specifically, it concerns interventions of protection and tourism valorisation of natural attraction areas with a strategic relevance for the region. Action 5.1. foresees interventions in protected areas both in land and sea environments for promoting and sustaining process of growth. The action sustains integrated plans of interventions and



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it's addressed to the private & public bodies responsible of the protected areas (municipalities, consortia, associations, etc). Interventions can concern the mapping of emergencies, the realization of control/monitoring systems, the environmental restoration of sites, the improvement of infrastructures and services for the development of the eco-tourism sector. This Policy Instrument should be improved because by now the planned actions for the better use of the natural heritage don't foresee a governance system that guarantees the correct execution of valorisation activities by preserving the correct and sustainable use of the territory. It is necessary, then, a governance configuration that overviews the sustainable impact in combination with the criteria of efficiency/effectiveness in all development investments involving the natural asset.

It is worth notice as the Regional Government adopted with Resolution No. 335 (published on BURM no. 53 dated 30/09/2017) the delegation of functions to the "Main Municipalities" for the implementation of the Urban Development Strategy, in the POR Molise FESR ESF 2014/2020. In the table below is therefore shown the distribution of the Priority Axis 5's funds to each Municipality Area:

1. AREA CB (Campobasso area)
2. AREA IS (Isernia area)
3. AREA TERMOLI (Termoli and nearest coastal area)

In the table below, it is highlighted the specific action derived by the Objective 5.1, as described in the following.

Priority Axis	Action	Total on Urban Area	AREA CB	AREA IS	AREA Termoli
5	5.1.1	€ 2'028'184.00	€ 700'592.00	€ 327'592.00	€ 1'000'000.00
	5.2.1	€ 2'822'594.00	€ 1'329'724.00	€ 492'870.00	€ 1'000'000.00
	5.3.1	€ 1'378'598.00	€ 466'945.00	€ 172'653.00	€ 739'000.00



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- The action 5.1.1. is related to interventions for the protection and enhancement of areas of natural attraction of strategic importance (protected areas in the terrestrial and marine environment, protected landscapes) that consolidate and promote development processes (6.6.1 AdP). Main admissibility indications and instructions are that the naturalistic protection and enhancement interventions must be concentrated in a few and identified areas of natural attraction of strategic importance (protected areas and protected landscapes), with particular reference to the Natura 2000 sites.
 - *Goal: Interventions for the protection and enhancement of areas of natural attraction of strategic importance (protected areas in the terrestrial and marine environment, protected landscapes) in order to consolidate and promote development processes. Recovery and enhancement of areas of naturalistic attraction*
 - *Financial allocation € 1 million*
 - *Note: The effectiveness of the interventions also depends on the approval of the Regional Competitiveness Management Plans*
 - *Indicator: Surface of recovered area, at least 10 hectare*

The area that will benefit from the intervention will be indicated. For example, for the realization of a path, it will be necessary to associate the surface served by the path to the required indicator and not the surface of the path.

- The action 5.2.1, related to interventions for the protection and enhancement of cultural heritage, both tangible and intangible, in areas of strategic importance that consolidate and promote development processes (6.7.1 AdP). Admissibility indications and instructions are: Cultural protection and enhancement



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interventions should be concentrated on relevant cultural attractors (few and identified), able to receive measurable flows of visitors (through appropriate input detection systems).

- Action 5.3.1 supports an integrated use of cultural and natural resources and promotion of tourist destinations (6.8.3 AdP). Eligibility indications and instructions are: In complementarity with private investments incentivized by the Action 3.2.1, integrated promotion interventions of the cultural / tourist offer will be carried out. In particular, the action will support a destination marketing policy by supporting the processes of construction and consolidation of an integrated tourism product, also by experimenting with innovative models; to strategic marketing activities (relationship of destination with the market); the networking of available services and the provision of new services, identifying the target audience, studying the needs of potential users, building an integrated service offer and a product-destination associated with the construction of a targeted communication campaign.

The Strategic Plan envisages the creation of the **territorial and economic factors as well as social context** that can ensure stable and lasting conditions of competitiveness, favoring the raising of the quality of human capital, the improvement of the urban context and the development of leading sectors. Therefore, Action 5.1.1, 5.2.1 and 5.3.1 shall be entrusted directly by Municipalities.

The basic idea revolves around the enhancement of the entire "Costa dei Delfini", involving the various municipalities adjacent to it, through multi-sectoral interventions, including infrastructures, that generate virtuous economic development routes, especially in tourism.



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The overall Vision therefore pursues the objective of re-evaluating the territory of Termoli and the neighboring municipalities as a productive and tourist center of Molise, developing and integrating services and interventions aimed at improving the quality of life of the inhabitants, increasing tourist flows and support the economic-industrial fabric, a fundamental driver of the development of the entire territory. In a nutshell, the vision is shown below:

"Urban Area of Termoli, from a place of access to the territory of Molise to the motor of the territory: towards an enlarged city that integrates, through participatory initiatives of sustainable development, its environmental, cultural, productive and infrastructural assets".

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