



# Policies, Practices and Strategies of cultural tourism in Europe

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### *Purpose and scope of the deliverable*

This is a framework report on Policies, Practices and Strategies. All partners have contributed material used in the production of the report which is described in the Work Programme as D2.1.

This report seeks to establish a benchmark. With so much in flux, a starting point for identifying significant policy change is necessary. The benchmark is set at the outset of the project, approximately Q1 (January to March 2020), before the impact of COVID-19 and before the onset/impact of the new Programming Period. As a benchmark, the report seeks to be descriptive; there is no attempt at this stage to introduce any evaluation into the document; nor is there an intention to 'cluster' case studies or countries – each case stands on its own merit. The attention to policy detail at Case Study level is relatively light. Here we are describing the Policy Framework. Detailed work on the Case Studies will take place later in the project when we have access to survey data and can view the emerging policies following the current hiatus in tourism.

This is the first stage of the policy theme running through the three years of SPOT - the Social and Innovative Platform on Cultural Tourism and its Potential towards Deepening Europeanisation.

This Framework Paper consists of four parts:

- Part One:** The Executive Summary
- Part Two:** The report on Policies, Practices and Strategies for each of the 15 partners  
(= Appendix A – Exploration of the Policy Framework)
- Part Three:** A spreadsheet showing broad themes for each of the partners  
(= Appendix B)
- Part Four:** A list of the sources used in preparing the report

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# 1 EXECUTIVE SUMMARY

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This is the first stage of the policy theme running through the three years of SPOT - the Social and Innovative Platform on Cultural Tourism and its Potential towards Deepening Europeanisation.

This is a framework report on Policies, Practices and Strategies. All partners have contributed material used in the production of the report which is described in the Work Programme as D2.1.

At the outset, it is worth noting the context of the report. SPOT was launched at the beginning of January 2020. The COVID-19 pandemic started to be experienced in various parts of Europe in February and March 2020, having a major impact on tourism in a very short space of time. It quickly became clear that tourism policy would be reviewed in all countries, but the implications for cultural tourism are still being worked out and policies will be somewhat fluid for an extended period.

A second major factor affecting the policy world is the end of the European Union Programming Period in 2020 and the development of new policies for the next period. This point marks a step-change for both EU-derived policy and the allocation of Structural Funds and whilst not all policies are dependent on these sources of funding for many countries they are an important factor. The sources explored in the paper show that while some policies have not been updated during the Programming Period, others are updated regularly and anticipate new directions after 2020.

A third factor – affecting some of the partner countries – has been a significant change of political direction. This has led to some major changes in the orientation towards tourism at large and towards cultural tourism in particular. For many, the economic driver remains (or is enhanced), but for others, additional factors are being brought into play – citizen focus, environmental concerns and so on. In some cases, the initiative for the dynamic implementation of policy moves between the national, the regional and the local. The resulting reorganisations mean that some new policy directions are, at best, only broadly sketched out.

This report seeks to establish a benchmark. With so much in flux, a starting point for identifying significant policy change is necessary. The benchmark is set at the outset of the project, approximately Q1 (January to March 2020), before the impact of COVID-19 and before the onset/impact of the new Programming Period. As a benchmark, the report seeks to be descriptive; there is no attempt at this stage to introduce any evaluation into the document; nor is there an intention to 'cluster' case studies or countries – each case stands on its own merit. The attention to policy detail at Case Study level is relatively light. Here we are describing the Policy Framework. Detailed work on the Case Studies will take place later in the project when we have access to survey data and can view the emerging policies following the current hiatus in tourism.

As part of the development of the framework, relevant issues are recorded including:

- Key actors in tourism and cultural policy
- Delivery mechanisms
- Links between different administrative levels
- Connectivity between actors
- Underlying concepts framing policy
- Orientation (e.g. over- or under-tourism, focus on employment, focus on GDP)

- Engagement of local residents
- Local perspectives of tourism – acceptability, importance etc.
- Outliers – the distinctive approaches which may have meaning for others

The policy process for SPOT is described in the Work Programme:

- i. The initial Policy, Practices and Strategies framework report identifies key actors, policies and processes, investigating how different processes interact with each other; how these interactions are mediated within particular places, and though the engagement of all actors; how cultural tourism is perceived in practice to re-position regions within broader social, economic and environmental relations.
- ii. As new policies are put into place over the next six months, a review will identify the changes and responses to a changing environment. This progression from the benchmark, in conjunction with survey data and detailed information from the Case Studies, will form the basis for dialogue with the Stakeholders from July 2021.
- iii. As part of the dialogue with Stakeholders, 'good practice' examples will be documented. Whilst not necessarily transferable to other situations, 'good practice' can be observed based on:
  - methods of policy formulation (participative processes etc.)
  - organisational structures
  - presentation of concepts
  - collaborations
  - environmental benefits
  - training for employees, agencies, operators
  - citizen engagement
  - target market identification
  - infrastructure development
  - financial coherence

A 'good practice' database is intended to be included in the SPOT platform.
- iv. Further analysis of the policy examples together with survey data provides the material for presentation and discussion with agencies at the European level.
- v. Policy briefings for national, regional and local actors will be prepared following a widespread further debate with Stakeholders.

Material is included:

Appendix A The report on Policies, Practices and Strategies for each of the 15 partners

Appendix B A spreadsheet showing broad themes for each of the partners

Appendix C A list of the sources used in preparing the report

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## 2 POLICY, PRACTICES AND STRATEGIES (Appendix A: Case Study Reviews)

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Appendix A – Exploration of the Policy Framework

### 2.1 Art Nouveau, Barcelona, Spain

#### NATIONAL LEVEL

Tourism is covered by the Ministry of Industry, Commerce and Tourism and the importance of the topic is recognised by the appointment of a Secretary of State for Tourism. The Secretary is State is leading a process based on the 2019 National Strategy for Sustainable Tourism, a vision with a horizon of 2030, which sets out a participative process involving the Spanish regions to lay the foundations for appropriate tourism according to the assets and requirements of each region. Recognising the world-class status of the Spanish tourist industry, the Strategy sets out an objective with five axes:

- Collaborative Governance
- Sustainable Growth
- Competitive Transformation
- Tourist Space, companies and People
- Product, Marketing and Intelligence

‘Collaborative Governance’ envisages the integration of the entire tourism ecosystem with the participation of public and private sector and other actors; the necessity of cooperation across Ministries is identified. The Transformation Axis sets out the intention of transforming Spanish tourism towards a model of ‘sustained and sustainable growth’ with an equitable distribution of the benefits and burdens of tourism.

The Ministry of Culture and Sport has a remit to preserve, reinforce and publicise Spanish Cultural Heritage; it carries out extensive surveys of tourist visitors and accommodation demands for tourist cultural visits, both internal and international. The Ministry seeks to collaborate with, and coordinate, the functions of the Autonomous Regions which have prime responsibilities in this area.

Important national policies for the preservation and promotion of cultural heritage (amongst others) are in evidence in Spanish tax laws – tax reliefs are given for donations by the public and relevant organisations to non-profit bodies operating in the public interest. This patronage is of considerable benefit to arts and cultural sites, collections and activities and particularly the Art Nouveau sites in Barcelona. Also of importance is the law on Spanish Historical Heritage which protects sites (including parks) and cultural and historical goods. Regulation of trade in artefacts is clearly set out, together with the requirement for the maintenance of inventories.

#### REGIONAL LEVEL

The Catalan Ministry of Economy and Knowledge (now replaced by the Ministry of Business and Knowledge) produced a plan in 2012 (Catalunya 2020 Strategy) which recognises the need for sustainable tourism and addresses the issue of ‘quality tourism’ and relates strongly to EU economic policy

(‘smart, sustainable’). The Ministry is responsible for some aspects of quality control in tourism products.

The Catalan Tourism Agency, a government body and part of Ministry of Economy and Knowledge, seeks to contribute to the prosperity of Catalonia and its tourism sector, being its voice abroad and focusing on attracting tourists and providing greater added value. The Agency includes members from the Chambers of Commerce and the relevant tourist boards. It places Catalan tourism in a world context and produced the 2018-2022 Strategic Plan for Tourism. The Strategic Plan addresses the huge anticipated increase in tourism to the region. Amongst the main responses sought by the Plan are the achievement of a higher quality tourist experience, reducing the pressures of tourism in Barcelona and on the coast by spreading the increasing numbers of visitors and the economic benefits inland, by increasing the number of visitors in low seasons and by attracting investment to develop new tourist products and services.

## LOCAL LEVEL

Barcelona City Council is perhaps the main driver of tourism policy affecting the case study area. The City Council views tourism, not as an economic sector, but rather an enduring feature which is fundamental to life in the city – ‘the City is Tourism’. It affects nearly every aspect of life in the city and consequently is a component of economic, planning and social strategies. Sustainability and Inclusion feature strongly in all the plans and are represented in the economic plan Green Deal (2020). The Green Deal proposes a Tourism and Culture Fund to develop new facilities to increase the cultural value of the city.

The City Council recognises the inter-connectedness of activity in the field of urban management and tourism and created a Tourism and City Commission which draws together the significant Council departments (including Strategic Supervision, Tourism and Events, Security and Prevention, Urban Habitat, Quality of Life, Equality and Sport, Communication, Culture Knowledge and innovation, together with the relevant District Councils and Turisme de Barcelona). The 2017 ‘collective strategy’ – the Barcelona Strategy for Tourism 2020 draws together the plan for Destination Barcelona. Following a large participation exercise involving a very wide range of tourist product providers, transport agencies, the Region, interest groups, trade associations etc., the key recognition was that the role of tourism management had moved beyond that of marketing and attracting new visitors – for Barcelona the integration of tourism with the city required long-term inclusive actions. This required ‘strategies based on a need to reinforce the public leadership of tourism governance’ – the collective governance of the tourist city.

Balancing the two issues - the quality of life for citizens of Barcelona and the need to harness the economic contribution of tourism - features strongly in City Council strategies, not least in accommodation and housing issues. In 2017, the Special Tourist Accommodation Plan was published to seek an equitable balance across the city to meet the needs of local residents in the context of increasing demands for tourist accommodation. The Special Urban Plan for the Regulation of Tourist Accommodation, Youth Hostels, Temporary Collective Residences, and Housing for Tourist Use sought to address some of the problems, but there is strong opposition; it is clear that this is an ongoing struggle. From 2012 different initiatives were introduced: the Barcelona Social Inclusion Plan for 2012-2015; Promotion of the participatory process on the Barcelona tourism model 2015; the Municipal Action Plan 2016-2019; Barcelona Right to Housing Plan 2016-2025; Program for the Coexistence between



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Neighbours and Tourist Accommodations 2017. All sought to achieve some measure of balance in this difficult area.

In the planning field, a more strategic approach has been taken to address the issues inherent in over-tourism and the possibilities for Barcelona. Metropolitan Strategic Reflection: Building the Barcelona Metropolitan Area - Strengthening the Local World is a document which takes a wide-ranging view of the processes which led to the current position and sets out the key themes:

- Social inclusion – including neighbourhoods
- Sustainable economic development
- Environmental sustainability
- Efficient mobility
- Cohesive territory – land use
- Capital status and governance

The City Council has legislated along national lines on the preservation of cultural artefacts, buildings, architectural, artistic and other heritage, but has gone further with a Special Plan for the protection of urban quality. Also, special protection is given and a specific plan has been drawn up for the case study area, for example, with particular reference to its Catalan character.

The City Council's District Action Plan for example sets out specific programmes and projects to enhance all aspects of life in the area.

## 2.2 Buzau Carpathians and Sub-Carpathians, Romania

### NATIONAL LEVEL

The Ministry for Public Works, Development and Administration are responsible at the national level for tourism, absorbing the functions of a previous dedicated Ministry of Tourism. The overall view of tourism at the national level is strongly influenced by external strategies, notably those of the EU. The Ministry is primarily focused on access to finance and programme and project delivery. In particular, an EU multi-country programme, Strategy for the Danube Region, has a key component 'Culture, tourism and direct contacts between people' and the overall approach seeks to enhance cooperation between relevant countries.

A long-horizon (2035) Territorial Development Strategy, under the auspices of the Ministry for Public Works, Development and Administration, addresses a wide range of infrastructure investments. Included in these is a specific theme addressing cultural infrastructure prioritised according to metrics relevant to tourist and cultural activities. There is an intention to protect, promote and exploit natural and cultural heritage. The strategy looks upwards towards European and global competition and downwards to take in regional and county assets and requirements. Spatial planning is carried out with a high level of technical detail; a ranking of counties and municipalities assesses the adequacy of the infrastructure to support activities, including tourism.

A Master Plan for the Development of National Tourism was created in 2007 (within the Ministry of Economy, Energy and the Business Environment). This covered the period 2007-2026 and examined the tourism infrastructure, training capacity and marketing. The economic impact of tourism was a priority. The vision set out in the Master Plan was, by 2026, to transform Romania into a quality tourist destination based on its natural and cultural heritage. It aspired to create growth in tourism in advance of other tourist destinations in Europe as measured by numbers of visitors and accommodation stays. To do this, initiatives were set out covering:

- statistics and research,
- policies, organization and legislation in tourism
- human resource development and training
- planning and development proposals
- tourist information services
- investment policy in tourism
- marketing
- environment protection

At the national level, tourism planning activities are strongly influenced by cooperation with Czechia, Poland, Romania, Serbia, Slovakia, Hungary and Ukraine under the Strategy for the Sustainable Tourism Development of the Carpathians. The Romanian part of this, from 2015, sees:

- coordination of public policies for the Romanian Carpathians and the emergence of the current regional and local governance structures
- the improvement of functional relationships between urban and rural areas
- consolidation of activities specific to the mountain area
- creation of a sustainable development network in the Romanian Carpathians i.e. increasing the level of integration between tourism and other relevant sectors, including socio-cultural,

ecological and economic elements, together with public participation and tourism awareness.

Further national planning – in the field of culture and heritage – is carried out by the Ministry of Culture, resulting in the Strategy for Culture and National Heritage 2016-2020. This has an impact at regional, county and local levels and identifies programmes and projects for public funding. The vision is to respect cultural rights and to focus the public and the community on culture as a public service. Objectives include:

- protection of cultural heritage and promotion of sustainable development
- encouragement of public/private partnerships
- development of entrepreneurship and relevant training opportunities
- promotion of cultural forms specific to national minorities and ethnic groups
- appropriate interventions for vulnerable groups.

## REGIONAL LEVEL

The study-area falls into the South-East Regional Development (NUTS 2). The South-East Regional Development Agency is a public utility body (non-governmental) bringing together local authorities, business, universities etc. to direct structural funds to the region. The Regional Master Plan identifies a high potential for tourism, culture and cultural infrastructure. A Smart Specialisation Strategy seeks to identify and build on high performing sectors in the region and includes the tourism sector.

## LOCAL LEVEL

At County level, Buzău County Council coordinates the local authority and community organisations. It has a Strategy for Tourism Development and Promotion in Buzău County (2016-2020) which researches tourism at the local level and develops strategies pertinent to local conditions. The County Council has a particular focus on cultural and folklore dimensions, promoting festivals, fairs and traditional crafts.

Some of the local mayors have programmes and policies relevant to their areas and have reference to tourism and sustainable development. Some maintain tourist information centres etc.

## TOURISM

A significant organisation is the Romanian Eco-Tourism Association, bringing together the National Tourism Authority, the national parks, private operators and ecological and tourism interest groups. It seeks to improve the quality of ecotourism services and to develop the infrastructure for ecotourism destinations, to contribute to nature conservation and sustainable development in Romania. It is a significant promoter of tourism in Romania and provides maps/guides and certifies accommodation and tourism services.

The National Association of Rural Ecological and Cultural Tourism focuses specifically on rural tourism and provides a range of training courses aiming to improve the quality of provision and promotes partner organisations.

At the local level, Buzău county and some of the local administrative units provide a range of tourism and information services.

## 2.3 The Cyclades, Greece

### NATIONAL LEVEL

From 2016, Greece once again had a Ministry of Tourism (following several reorganisations, tourism was briefly part of the Ministry of Economy, Infrastructure and Tourism). The role of the Ministry includes intervening to harmonise policies affecting tourism across all Government Ministries and supporting the authorities of Regional and Local Government and other bodies with responsibilities in the field of Tourism; as an example, it was charged with working with the Ministry of Finance to attract private funds into the field of tourism.

The National Tourism Strategic Plan 2014-20 looked to:

- enhance infrastructure, streamlining regulations, developing untouristed areas
- respect sustainability
- improve air accessibility and marinas
- improve the quality of visitor experience and improve training for tourism workers
- develop more specialised tourist products

In 2016, in the framework of actions of the Operational Program "Competitiveness, Entrepreneurship and Innovation" a new direction was introduced: 'Policy for the promotion of sustainable tourism development in Greece' had an over-arching goal 'Strengthen the Greek brand and identity beyond tourism in a collective effort, mobilising stakeholders in the tourism and other sectors of the Greek society and economy' and sought to:

- Anchor and support key themes in tourism in which Greece will develop a sustainable competitive advantage.
- Stimulate innovation and entrepreneurship, introducing new momentum to the Greek tourism industry and further strengthening the identified key themes.
- Indicate options for selected 'fast track' opportunities for tourism products, which would help to extend the short season to "365 days Greece" and increase average per capita spending.

Economically, tourism had not featured as strongly at the national level as its international profile might have indicated. However, in 2019 the updated version of the National Development Strategy, 'Greece: A Growth Strategy for the Future' was introduced. The Deputy Prime Minister and Minister for Economy and Development indicated that it set the stage for the next programming period from 2021 – changing the course of the national intervention. Stating that 'for decades, the Greek economy was moving without a "compass"; economic growth was anarchic and fragmented', the new strategy 'Sustainable, Fair and Exclusive Development' focuses on 9 sectors, including Tourism and Culture, sets out progress in these areas and points to necessary investment strategies for the coming decade. The proposed Strategy incorporates the UN Sustainable Development Goals and is in line with European development priorities. There is a strong theme stressing the interconnectedness of the key sectors (including Environmental, Agri-foods, Transport etc.) and the possibility of synergy by close cooperation. Tourism is seen as a driving force in economic development – tourism can generate cooperation and synergy and give a focus on local communities. The development strategy makes solid and supporting reference to the existing National Tourism Strategies.

As part of the refocus, Enterprise Greece - an official agency under the auspices of the Ministry of Foreign Affairs - promotes investment in Greece, promotes exports from Greece, and strives to make Greece more attractive as an international business partner, one of the target sectors being tourism.

In keeping with the drive to increase the impetus of Greek Tourism in 2019, a consultants' report for the Ministry for Tourism reviewed Strategy. 'The next day of Greek Tourism' found that Greece is in the middle of the global tourism competitive rankings (24th in the world). The primary conclusions were that the following actions needed to be implemented systematically:

- Strengthen demand from high-income destinations
- Introduce complementary products to increase income
- Expand peak demand across destinations
- Upgrade the tourist product

(The new strategy for 2021-30 builds on these themes)

Greece regularly carries out reviews of policy relating to tourism sectors. In 2018, a significant law set out proposals for Thematic Tourism. So pilots of destination management plans are carried out and thematic plans for special forms of tourism, including cultural tourism, Green Policy for Tourism, Policy for Alternative Tourism (diving tourism etc.) have been developed. Institutional frameworks, education for tourism, entrepreneurship have all been reviewed.

The Greek National Tourism Organisation, an independent legal entity, but supervised by the Ministry of Tourism, is responsible for the implementation of policy, working with the tourism industry and promotion of Greece, nationally and internationally as a tourist destination. Its Marketing Plan for 2019-20 differentiates the offer between 13 regions, proposes new destinations and supports measures to reduce seasonality.

The Ministry of Culture and Sports oversees many of the aspects and organisations of Greece's cultural heritage and is charged with the protection of antiquities and historic sites (including extensive underwater assets) and support of a range of museums. The focus is more on preservation, investigation and education than on using the assets as tourist attractions per se. There is considerable emphasis on modern cultural activities and the work of both historic and modern culture is framed in the context of Greece's contribution to European culture.

## REGIONAL LEVEL

The primary regional government body is the Decentralised Administration of the Aegean. The region is a local self-governing legal entity under public law and is the second level of local government that generally plans and implements policies at the regional level within its remit. The Decentralised Administration is divided into North and South Regions, the capital of the South Region being Ermoupolis on Syros

The Ministry for Tourism has regional units which work on specific aspects of tourism in the region. The Regional Service of the Ministry of Tourism is sited on Rhodes, with a Tourism Support Unit based on Syros serving the Cyclades.

The South Aegean Region, in collaboration with the Association of Greek Tourism Enterprises (SETE) and Marketing Greece, developed a three-year Strategic Tourism Development Plan, which began to

be implemented in March 2016 in line with current marketing trends. There is an integrated network of tourism promotion actions of the Region under the strapline 'AegeanIslands. Like No Other'. In particular, the South Aegean Region has drawn together a whole range of tourist-related businesses and organisations to promote the 2019 European Region of Gastronomy. In addition to developing local products, quality standards and gastronomic identity, and food chain management, the initiative also focuses on bringing former natives back to their homeland.

An exercise carried out in 2019 (funded by the European Bank for Reconstruction and Development) set out to develop destination management plans for Rhodes and Santorini. This involved participation with residents, businesses and was carried out in collaboration with the Ministry for Tourism. Active in the South Aegean is the University which hosts the Tourism Observatory and developed a tourism plan in 2015.

### **LOCAL LEVEL**

In the case of the study area for the Prefecture of Cyclades the following 3 municipalities are established (each including several islands):

1. Municipality of Syros-Ermoupolis with headquarters in Ermoupolis and historical headquarters in Ano Syros. The Municipality of Syros- Ermoupolis is responsible for a range of functions and maintains a range of year-round cultural activities and festivals.
2. Municipality of Naxos and the Small Cyclades based in Naxos.
3. Municipality of Thira based in Thira.

## 2.4 Ida-Virumaa, Estonia

### NATIONAL LEVEL

In Estonia, responsibility for Tourism policy accrues to the Ministry of Economic Affairs and Communications. The wish to increase tourism to generate income and economic activity is very clear; the main objective of Estonian tourism policy is to increase the international competitiveness of Estonian tourism and to ensure sustainable economic growth by developing tourism services and domestic tourism. Estonia operates in a market where there is considerable competition from neighbouring states and it starts with many significant disadvantages, not least of which is the low level of accessibility by air travel.

The National Tourism Development Plan 2014–2020 sets out both the challenges and the way forward. The main goal of the development plan is to grow the tourism sector by approximately one third. To achieve this it proposes the following key actions:

- Increase the awareness of Estonia as a travel destination.
- Diversify the choice of tourism products and services and improve their quality.
- Increase the awareness of tourism undertakings of the opportunities for introducing new business models and product design.
- Ensure the availability of profound and interesting tourism information along the visitor's route.
- Improve transport connections that are important for tourism.
- Develop regional tourism products.

Implementation of national tourism policy and development activities takes place through the Estonian Tourist Board, under the Enterprise Estonia Foundation (which is administered by the Ministry of Economic Affairs and Communication). The overall vision of the Estonian Tourist Board is unashamedly financial – 'to increase tourism export earnings' and metrics for activity in different sectors will measure that increase. In addition to the marketing and promotional activities, the Tourist Board undertakes training with the regional tourism organisations and supports investment on significant tourism projects and major events intending to enhance the reputation of Estonia.

Some changes to the view of tourism are flagged for the future. A draft strategy for 2020-24 identifies Estonian culture (folklore and intangible heritage) as a unique selling point that can tie together different areas of tourism and attract new tourists.

The Ministry of Finance is responsible for regional policy and the Regional Development Policy 2020 (developed in 2014) mirrors European policy fairly closely.

The Ministry of Culture developed the Culture Strategy 2020 (adopted in 2014). The national cultural policy is based on the constitutional aim of ensuring the preservation of the Estonian nation, language, and culture in perpetuity. Estonian culture is defined as the creation of native Estonians as well as that of other nationalities living in Estonia. To reflect the emphasis on these two dimensions, the Ministry has an Under-Secretary for Cultural Heritage and an Under-Secretary for Cultural Diversity.

In addition to the focus on Culture as it relates to Estonian citizens, the Ministry seeks to invest in cultural infrastructure which supports tourism and regional development. The contribution of folklore

and the variety of traditions and languages is seen as a genuine opportunity to create richer tourist experiences.

## REGIONAL AND LOCAL LEVELS

There is no regional authority covering the Case Study area, rather the county of Ida-Viru operates under a collaboration of eight cities and several rural authorities. This is a strong collaboration and has been operating for many years, producing the Ida-Viru Development Strategy 2019-30+; the operational arm of that joint work is the Ida Viru Enterprise Centre. The Strategy identifies a number of issues affecting the region, with a focus on population loss and poor transport connections (both national and international). The over-riding message from the Development Strategy is the importance of continuing joint working of the authorities across the whole range of service and economic activities. Amongst these activities is Tourism: local agencies have formed a Tourism Cluster, comprising the local authorities and around 50 local bodies; the Tourism Cluster Strategy 2014-20 set out the parameters for that joint work. Tourism is important as an economic activity, but at a more basic level, the Strategy suggests that only by maintaining the number of visitors to the region will it be possible to provide a full range of services to the public; lack of adequate quality services and accommodation for visitors is identified as a problem. Whilst noting the range of potential visitor attractions, the Strategy referred to the difficulty of developing a single image to project outside the region. Three priority areas were agreed:

- marketing
- product development
- leadership and management (leading networks and increasing tourism competencies)

A draft Strategy for the period after 2020 (initially 2020-23), takes some of the issues forwards:

- product and service development with a focus on client satisfaction
- unified marketing strategy through dedicated tour operators in the region
- focus on attracting family visits via promotion as ‘Adventure Land’
- organising and coordinating training to promote both employee loyalty and service quality

There is an intention to introduce a tourist tax to provide income to support these activities.

As a footnote, while the 2014-2020 Strategy highlighted ‘cultural tourism’, the proposed 2020-2023 strategy narrows the focus and, whilst elements of cultural tourism remain part of the regional offer, they are seen as an element of adventure/nature and wellness tourism.



## 2.5 Kinderdijk, Netherlands

### NATIONAL LEVEL

The Ministry of Economic Affairs and Climate has a general competence on Tourism, but with only a small central resource, the work on tourism is strongly focused through the Netherlands Board of Tourism & Conventions, an independent foundation. The broad Government approach had been 'to strengthen tourism and recreation in the Netherlands by attracting more visitors from abroad', but in 2018, a Tourism Summit involving representatives of the Provinces, together with a wide range of representatives of business, tourism and government organisations was held. A strengthened policy was established based, not on increasing tourist numbers, but on 'increasing the value and spread of foreign visitors'. This was developed (via work with over 100 experts and including participation with residents and administrators) into Perspective 2030, a detailed policy proposal with an over-riding goal 'By 2030, every Dutch person will benefit from Tourism' and a sub-text 'residents first'.

Perspective Destination Netherlands 2030 pursues those goals with:

- more benefits than burdens (everybody will be better off)
- all areas of the Netherlands are appealing (spreading the tourists over more of the country: the policy HollandCity describes how this will happen)
- accessibility (improved transport links to move tourists)
- sustainability
- a hospitable industry (improving the quality of the tourist experience)

In developing the Strategy, the Provinces stressed the need for better information, better collaboration, better coordination. However, the Ministry sees scope for distinctive regional approaches to meet local needs rather than strong central guidance.

The Cultural Heritage Agency of the Netherlands is part of the Ministry of Education, Culture and Science. The focus of 'Mission, Vision, Strategy of the Cultural Heritage Agency of the Netherlands 2020' is on preservation and interpretation; it looks overwhelmingly towards a Dutch audience. The Strategy addresses Monuments, Movable Heritage, Archaeology and Landscapes in that context. However, the Agency works also on shared cultural heritage in a partnership with ten other countries and an important dimension of the work of the Agency is in connection with World Heritage sites - the Agency takes the line that key importance of the sites is in the image of the Netherlands which is presented to the outside world and so the cultural position of the Netherlands in the world.

### REGIONAL LEVEL

The public authority here is the Province of South Holland. In the context of the national strategy for tourism, South Holland has 'Perspective for Tourism South Holland 2030'. The distinctive interpretation for the region includes:

- establishing a strong link between the growth of tourism and social and economic goals linked to employment, facilities, ecology and identity. This requires a long-term view and links with others outside the region.
- intervention to ensure/enable suitable investments, programmes and initiatives take place to deliver the overall aims.
- intervention to improve the quality of the offer to visitors.

- cooperation, delivery networks to be addressed taking particular account of spatial planning requirements
- role of the Province in stimulating knowledge creation and exchange.

There is a strong emphasis on cooperation between the different levels of government to achieve satisfactory/acceptable solutions to balance the benefits/disbenefits of tourism.

## LOCAL LEVEL

The Kinderdijk Steering Committee (comprising The World Heritage Kinderdijk Foundation, the municipalities of Alblasterdam and Molenlanden, the Rivierenland Water Board, the Cultural Heritage Agency of the Netherlands and the province of South Holland) has developed the Kinderdijk Area Perspective.

Kinderdijk has a range of complex interests, with a World Heritage site, a broad desire to increase income from tourists, over-tourism, concern over local residents living in a 'theme park', water safety, environmental and spatial planning pressures amongst the issues to be tackled. The Kinderdijk Area Perspective seeks to address the many competing pressures and posits a range of options. The urgency of action is portrayed by the statement 'Kinderdijk is at the crossroads'. Mass tourism is seen as a threat and those preparing the strategy sought examples around the world of highly focused tourist flows to major attractions. Their conclusion was 'best practice examples involving iconic tourist attractions and the maintenance of the quality of life of local residents have not been found'.

Developing a unique approach for the specific circumstances, the Perspective seeks to address the problem by the use of 'Stories' to segment and manage the flow of tourists. Management of tourist numbers – via pricing, story-telling, developing story-based visitor flows to adjacent areas etc. – is critical. So international visitors, for example, can be given a thorough background which may encourage longer stays and inter-connectedness with neighbouring attractions.

The Municipalities of Molenlanden and Alblasterdam play a major role, not only in managing tourist activity (Molenlanden municipality owns most of the World Heritage site) but particularly in support of local residents. Molenlanden is very active in e-participation and in citizen engagement with local strategies, working to ensure the 'residents first' mantra has meaning.

## 2.6 Komárom, Hungary

### NATIONAL LEVEL

Responsibility for tourism rests with the Ministry of National Development, which in 2013 produced a plan 'National Development 2030 – National Development and Territorial Development Concept'. The Concept describes a serious economic problem and sets out to identify the potential areas for growth and increased employment. It seeks to identify resources to make progress and the primary framework of the development policy consists of the EU Cohesion and Rural Development Policy and the EU development resources available in the 2014-2020 programming and development period. Based on the national needs and specificities, the Concept sets out mid-term strategic focus points (between 2014 and 2020), which contribute to the implementation of the long-term objectives of the country. The national priorities are adjusted to the programming frameworks defined by the European Union. Principles described are:

- inclusion and social cohesion (including addressing disadvantaged sub-regions)
- equal opportunities and strengthening the identity of nationalities
- sustainable development and sustainable growth
- value preservation and intelligent growth

In its analysis, tourism is identified as one of the top ten priorities but is seen to be underperforming. Potential is recognised, particularly in health and wellness, based on a history of spas and the natural endowments of the country, but there is considerable work to be done. Anticipated foreign investment had not been forthcoming and Hungary has tended to rely on European funds to make progress. Specific reference is made to cultural tourism, which is considered to be restricted – particularly to attract international visitors - by the lack of investment in maintaining and improving cultural assets. The tourism market is seen to be largely domestic and from neighbouring countries, but the competition (fierce!) from the same locations is described. There is an enthusiasm to explore cross-border opportunities to increase the quality of the potential tourist offering, to encourage longer stays and to make efficiencies in marketing.

The National Tourism Development Strategy 2030 (produced in 2017) – strapline 'We want to share our passion for Hungary' – has many priorities and, as part of its vision, the Strategy seeks to develop 'cooperative tourism', enabling visitors to experience local lifestyles by living together with the local communities, in harmony with the environment. It looks for contribution to 'the protection of our communities and national values and the encouragement of patriotism'.

The national approach to dealing with destinations – Tourism Destination Management - aims to create and operate a sustainable and competitive tourism system in a region visited by tourists, with activity at national, regional and local levels. The driver for this activity – under the auspices of the Ministry for National Development – is the Hungarian Tourism Agency. The Agency, formerly part of the Ministry, was spun out as a private sector organisation to reorganize the sector according to market needs, the professional preparation of legislative work and national marketing tasks, the coordination of events, tourism product development and the management of foreign missions. The Kisfaludy Tourism Development plan, as part of the overall strategy, seeks to address the identified underinvestment in facilities and accommodation. State-supported attraction and infrastructure development and a redefinition of the state's role in tourism form the first part of the plan (to 2023); the

second phase involves decreasing the share of state's involvement and establishing a sound and effective regional organisational system. The intention is to provide more equitable distribution of the benefits of tourism, whilst seeking social, economic and ecological sustainability.

In the Ministry for Human Capacities, the Secretary of State for Culture holds the Culture brief. The Cultural Tourism Development Strategy 2009-2013, which covered implementation until 2015, was very outward-looking, identifying cultural tourism as a marketable product. It described Hungary's intellectual heritage (including famous historical, public and literary figures) and sought to develop relevant festivals and celebrations to build on this resource. Cultural tourism has now been absorbed into the overall Tourism Development Strategy 2030.

## REGIONAL LEVEL

The Territorial Development Strategy and Operational Programme for Komárom-Esztergom County, 2014 was posited on the gap between tourism potential and tourism actuality. It sought to identify new venues and routes for tourism, to develop the organisation networks and to prioritise projects which preserve and sustainably utilise cultural tourism targets, including cycling and walking options, together with the promotion of health tourism. The importance of structural change and new opportunities (for collaboration and finance) as a result of developments in the Danube basin were highlighted. The opportunity for cross-border stimulation of the tourist economy was stressed, as was the necessity to manage conflicts and shortcomings. The need for investment was also identified, not only to maintain and improve the cultural tourism infrastructure but also to address the issues caused by depopulation – abandoned and derelict buildings, poor services etc.

A previous strategy, the Tourism Development Strategy of Central Transdanubian Region 2006 set out many desirable developments, but implementation proved difficult due to financial and other issues. Transport and accessibility are a continuing problem.

An aim is to promote the twin cities of Komárom-Komárno, with Hungarian/Slovakian cross-border economic development, making use of the possibilities offered by the new infrastructures and establishment of new tourism opportunities utilising the bridge across the Danube. In this context, it is important to recognise the Slovakian role in tourism policy in this area; Komárno is in the Nitra Region of Slovakia and the pertinent policies are described in the Case Study relating to Nitra elsewhere in this report.

## LOCAL LEVEL

At the local level, there is a concentration on the opportunities for cross-border tourist activity; this is given additional stimulus by the construction of a new bridge across the Danube. The Integrated Sustainable Tourism Strategy of the wider Pons Danubii region (2019) identifies numerous opportunities to foster improved and sustainable development of the Danube region and particularly an integrated tourism approach. A project promoted by EU funding and involving 13 partners covers the period 2019-2028. Opportunities for Hungarian/Slovak collaboration and building on elements of common heritage are identified and the keys for progress are:

- cross-border interaction of tourism experts
- sustainable tourism
- joint marketing strategy

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The engagement of tourism services providers is important and mechanisms for increased collaboration are being developed.

The Local Government of Komárom provides many services for tourists, including information and development of new tourist products.

The Tourism Associations, key players in the hierarchy of the Tourist Destination Management process, are Komárom Tourist Association, the Tata and Surroundings Tourism Association and the Duna-Gerecse non-profit Association (jointly owned by the Tata and Komárom Tourist Associations and the Komárom-Esztergom County Local Government. Together, they promote tourism nationally and internationally, develop new tourist products, and assist in showcasing local handicrafts and food. There are parallel organisations on the Komárno bank of the Danube (covered in the Nitra section of this report).

## 2.7 Lusatia, Germany

### NATIONAL LEVEL

The Federal Government does not have a ministry dedicated to Tourism; the tourism brief resides within the Federal Ministry of Economic Affairs and Energy. Whilst this gives the Tourism Policy an undoubted economic orientation, the policy is wide-ranging and covers both background research, including demographic change and many social and structural considerations. To further ensure integration across a range of relevant activities the Bundestag has created a separate Tourism Committee (not a sub-committee of the Economic Committee).

A key report is the Federal Government report on Tourism Policy 2017. It states that the 'central task and goal of tourism policy at the federal level is to create a good framework for the positive development of tourism in Germany'. The framework is strongly reflected throughout the policy which aims to support activity primarily at the level of the Länder, the regions. The Joint Federal Government-Länder Task for Improving Regional Economic Structure (GRW) is the central instrument of the Federal Government's regional policy. GRW project funding is provided in the form of investments in trade and industry and the tourism economy, with municipal investments in economic infrastructure, including basic infrastructure for tourism (developing land for tourism and public tourist facilities). 14% of the GRW budget is allocated to tourism.

Some direct activities are seen as a Federal function, perhaps the most important of which is 'to directly assist the profitability and competitiveness of small and medium-sized businesses in the tourism industry' and a strong education and training thrust. It is recognised that the dual system of vocational training and education is of particular importance in the tourism and recreational industry. A total of twelve occupations in the dual system are available to the tourism industry across the range of hotel, catering and logistics operations.

The profitability and competitiveness of small and medium-sized businesses are actively promoted by the Ministry of Economic Affairs and effort is directed, amongst others, to supporting tourism businesses, particularly in disadvantaged rural areas. A specific long-term approach is taken with at least a ten-year planning horizon. Noting that the biggest challenges for German tourism policy are to enable rural regions and, in particular, economically weak regions and their populations to reap greater benefit from tourism than was previously possible, the Ministry has created a specific initiative to explore Cultural Tourism in rural areas. Several 'model regions' were selected for a 2015-18 national programme (including part of the SPOT Case Study region) and a 'coaching' approach was taken, bringing key players –small businesses, tourism industry professionals, creative artists etc. - to work together to develop the potential in the target areas.

The Ministry has a particular focus on maintaining and promoting a framework within Germany for all the interested players in the tourism and related activities; it maintains relationships with the main international organisations, particularly the EU (and its regional and structural funds), OECD, UNWTO and the T20 (a specifically focused grouping of tourism ministers deriving from UNWTO).

At the Federal level, cultural and media policy is overseen by the Commissioner for Culture and the Media, and policy is represented by a 2018 report. It recognises the continuity of culture, noting that it is inherited from previous generations and must be guarded and passed on to future generations.

The diversity of Germany's cultural landscape is important; the rich and diverse cultural scene is not limited to large urban conurbations but is very much alive in smaller towns and rural regions too.

A European perspective is presented: 'underpinned by our shared European cultural history, the EU has become a cultural community of values in which diversity is lived and what unites us is given priority over what divides us'.

Throughout, the policy has a strong emphasis on buildings and institutions, together with historical remembrance and commemoration. Attention is also given to minority cultures; four officially recognized national minorities live in Germany, among them the Sorbs which have their traditional settlement place in the Lusatia region. They differ from the majority population in having their own language, culture and history and thus their own distinct identity; this is reflected in tourism marketing.

Culture and cultural tourism are, in practical terms, primarily a responsibility of the Länder.

## REGIONAL

At the regional level, a strong emphasis on identity brings together the various actors in the field of Tourism. In particular, the 'Tourism Concept for Brandenburg' sets out six fields for action:

- innovation
- cooperation
- digitization
- infrastructure
- marketing
- focusing on target groups.

It engages tourism associations, funders, governmental and non-governmental organisations (although an analysis for the Tourism Network finds that there is scope for more cooperation between businesses operating in the field). A particular strength is the engagement of scientific institutions.

The overall strategy – which is heavily marketing-led – develops the Berlin-Brandenburg axis and identifies strengths and weaknesses in the region offers. Guidance is offered on brand development, creation of tourist products and packages, marketing and collaboration/networking. The Brandenburg State Tourism Association brings together many of the tourism organisations in the region and seeks both to promote and influence the regional marketing thrust.

Regionally, Cultural Tourism is described in a 2013 report which aligns with much of the thrust of tourism in Brandenburg and seeks to identify market opportunities, possible approaches by tourism services providers and stresses the need for partnership working.

Spatial Planning takes place through a joint Berlin/Brandenburg department and the State Development Plan (which is advisory, not binding) examines regional cultural landscapes with a view to recreation and tourism. Tourism is seen largely as a rural issue in the region, with particular reference to cycling and water-based activities.

The Brandenburg State Parliament addresses the future of rural areas (particularly in the context of demographic change) and in a 2019 report sought to address sustainable development. It considered

that rural tourism marketing needed to be improved sought to spread tourist activity to more seasons of the year and explored 'healthy' tourism markets – sports, medical and therapeutic activities.

## LOCAL

At the local level, there is intensive work in the Case Study area, under the auspices of the County Department for District Development, Economic Affairs, Financial Affairs and Security. Funding has been attracted from a wide range of sources and a very ambitious development plan is both in place and under continuous enhancement to create an extremely wide range of visitor attractions. The plan uses existing landscape assets – wilderness, biological diversity etc., but also seeks to restore a former military training area which is part of the Case study area and in which an International Nature Exhibition is planned.

One locality – Goyatz (part of the municipality of Schwielochsee) – has a Recreation Development Concept (2018). It sets standards for the development of the local recreation and tourism infrastructure (including cultural) and is a formal precondition to be licensed as an “Officially Recognised Recreation Community”, important for branding and tourism marketing.

## TOURISM BODIES

Tourism bodies at the National and Regional levels are extremely well integrated into the planning and development processes. At the National level, the Tourism Association of Germany is active in ensuring the quality of the tourism offering, with the certification of accommodation and tourist information, by training tourism providers and by promoting the development of new tourism offerings. This is a two-way activity and – through the Tourism Association, operators have been able to press for a more strategic Tourism Plan at the Federal level. A 2019 report by the Tourism Association reviews progress, legislation, training arrangements, accreditation etc. for the period 2016-19.



## 2.8 Ljubljana City, Slovenia

### NATIONAL

The Ministry of Economic Development and Technology has a Tourism Directorate charged with 'drafting and implementing strategies and policies to promote tourism development'. It describes standards for the tourism and hospitality sectors, seeks to harness European Investment and Structural funds and participates in international organisations related to tourism. The orientation favours economic development as a motivator for tourism development and concentrates on improving the business environment to promote this.

The Strategy for the Sustainable Growth of Slovenian Tourism for 2017–2021 contains a thorough review of relevant data at Slovenian, European and international levels. A large number of shortcomings of the Slovenian tourism sector were identified, including:

- the low profile of tourism as an economic driver
- lack of international vision
- inadequate and out-dated tourism infrastructure (hotels, visitor centres, resorts, sports facilities etc.)
- lack of expertise in key tourism activities, including logistics
- poor public transport (both international and internal)

The Vision shows a major strategic change, building on the strengths already inherent (a 'green boutique destination', peaceful outdoor activities, geographical variety, 'Central European elegance' etc.) and portrays a high quality 'experiential' market orientation seeking to position Slovenia in many markets – Mediterranean Slovenia, Alpine Slovenia, Thermal Pannonian Slovenia and Central Slovenia with Ljubljana. It is strongly differentiated from a mass-market approach and is aimed to attract international visitors. Added dimensions include the wish to develop synergy of tourism activities (and information) with those of neighbouring countries and a determination to create progress based on sustainability. The Strategy identifies the whole range of actors who can help to progress the Strategy and sets out a monitoring regime.

Although the identified market has clear coherences with Cultural Tourism, that concept is not well developed in the Strategy; elements including gastronomy, urban tourism are emphasised.

The Ministry of Culture covers arts, culture, cultural heritage, the media, freedom of religion, cultural diversity, human rights and organisation of state ceremonies. It is concerned with the conservation of cultural heritage (including the Slovenian language) and has a directorate responsible for museums archives and libraries. There is a strong emphasis on cultural heritage as an important element of national identity and a primary direction towards a Slovenian audience; this is not a static concept and support is given to creativity and cultural self-employment in this context. The overall goals of the Strategy for Cultural Heritage (2020-23) are to encourage and support the role of heritage in contributing to an inclusive society, balanced and smart development and continuous knowledge transfer. It sets the actions in the context of international activities in the field of cultural heritage.

### REGIONAL LEVEL

Whilst Slovenia has no formal regional authorities, Regional Development Agencies group together the municipalities, engender cooperation and collaboration and assist in accessing structural funds.

The Regional Development Programmes relate to EU priorities, are the prime source of funds for regional development and are agreed with the municipalities and the Ministry of Economic Development and Technology. The Ljubljana Urban Region Plan (2014-20) emphasises cultural issues and institutions, seeks to promote cultural and natural heritage as a high priority and makes links with related tourism activities - sports, agriculture etc. and seeks to encourage entrepreneurship in products and services. One of the main functions carried out at the regional level is facilitation. Cooperation is promoted between a very wide range of stakeholders and tourism partners; funding advice and other assistance are provided and the promotion of the region is carried out.

The Regional Development Agency of the Ljubljana Urban region is the main regional institution to be engaged in the transnational INTERREG projects, some of which focus on cultural heritage valorisation and protection.

Other cultural aspects at the regional level are the province of the Institute for the Protection of Cultural Heritage of Slovenia, which operates both regionally and locally.

### **LOCAL AND COMMUNITY LEVEL**

Slovenia displays a vibrant network of tourism-related activities through the city and neighbourhoods. Ljubljana City Council provides a focus for development, has planning responsibilities (including transport) and has a City Department of Culture. It supports Ljubljana Tourism, a body promoting regional and local tourism and working with stakeholders and tourism providers. Citizen engagement and participation are carried out by small community organisations; the impact of traffic and other potentially negative effects from tourism are monitored at this level.

The Culture Development Strategy in the City of Ljubljana (2020-23) is concerned with protecting and promoting Slovenia's cultural heritage, whilst contributing to the quality of life, community cohesion and sustainability. It acknowledges the need to address an international audience, and as well co-operation in the development of cultural tourism with the nearby municipalities.

### **TOURISM ORGANISATIONS**

The Slovenian National Tourist Board promotes tourism products and services, both within Slovenia and internationally, including maintaining offices in Italy, Austria and Germany. The Slovenian Conventions Bureau provides planning services to potential event organisers and is supported by both public and private bodies operating in the field.

The Tourist Association of Slovenia is an independent umbrella organisation that brings together over 600 local voluntary tourism bodies, municipal and regional tourist associations and other organisations.

The Tourism and Hospitality Chamber of Slovenia represents member businesses and entrepreneurs in tourism and hospitality in their relationship with national authorities and with European industry associations. It provides professional help in the form of counselling, educating, informing, and training for its members and has jurisdiction over licensing of tourist guides and agencies and undertakes categorisation of accommodation establishments.

## 2.9 The Valley of Palaces and Gardens (Lower Silesia, Poland)

### NATIONAL LEVEL

The Ministry of Development holds the National Development Strategy 2020 (produced in 2012). The Strategy highlights changes expected in society with increased free time and see tourist products (including cultural and creative enterprises) as having a contribution to make. However, the Strategy refers to tourism only in passing, does not integrate tourism into the National Strategy and does not define tourism as one of the priority industries. A further report, produced in 2017, Strategy for Responsible Development by 2020 (with a Perspective to 2030) mentions tourism only in connection with the medical and wellness industries.

At the national level, responsibility for Tourism has recently changed. Formerly it was represented in the Ministry for Sport and Tourism, but in 2018 the two functions were split and Tourism was absorbed by the Ministry for Development. Tourism is now represented by a department in the Ministry, but with a limited remit: 'Responsibility for programming the development and shaping the legal and economic mechanisms of tourism, setting directions and priorities, and supervising the implementation of tasks in the field of tourism promotion in both domestic and foreign markets'. Also under the aegis of the Ministry is the Polish Tourism Organisation which carries out the Marketing Strategy.

The existing Tourism Development Programme 2020 was produced in 2015 for the former Ministry. The initial perspective is that 'the tourism economy may significantly contribute to improving the economic, territorial and social cohesion of Poland. All this creates new possibilities of approaching tourism development as a part of regional policy, indispensable for strengthening the competitiveness of individual territories' i.e. that the main focus for tourism policy is at the regional level and that entrepreneurship is a key vehicle for progress. The Strategy states that Poland is underperforming compared with other countries in the development of the contribution of tourism to the national economy. The programme seeks to promote the development of competitive and innovative tourism through supporting tourism sector enterprises, organisations, institutions and initiatives, while respecting the principles of sustainable development; amongst the priority areas is cultural tourism, with a particular focus on industrial tourism. (The other priorities are business tourism, rural, wellness and active tourism). The Ministry is seen to have an important role in promoting cooperation amongst all levels of government, tourism sector organisations etc. looking towards 'clusters' to aid the development of synergy. 15 National Ministries are identified as having potential contributions to changing the performance of Poland in the field of tourism. A National Tourism Management Centre, as part of the Ministry, would support the development of certification and management systems for the tourism economy, develop quality standards and professional competence at all levels of the industry.

The Ministry of Development Funds and Regional Policy produced the National Strategy for Regional Development 2030 in 2019. Envisaging 'the more complete use of cultural and heritage assets', the Strategy does not develop the theme; tourism is not described as a core component of Regional Policy (but its presence in European Programmes is noted). The diversity between regions is anticipated, but the Ministry would act as coordinator, not setting out specific directions to be followed.

The Ministry of Culture and National Heritage maintains the National Strategy for Culture Development 2004-2020 (produced in 2005, but subject to updates). Whilst the Strategy is primarily focused

on preserving cultural assets (not least to celebrate diversity between regions), it does see the potential for economic activity in creativity and addresses the role of monuments in developing tourism. It sees the promotion of Polish culture in the context of, and as a contribution to, the development of a European identity.

The Ministry oversees the work of the National Heritage Board of Poland, the governmental institution responsible for the objects, buildings and other assets considered most important to the nation's cultural heritage.

## REGIONAL LEVEL

The Department of Economy, Lower Silesia Marshal's Office implements the 2020 Development Strategy for the Lower Silesia Voivodship (produced in 2005). A key aim is a diversification which seeks to achieve by:

- stimulating investment location and supporting the development of small and medium-sized enterprises,
- supporting the creation and absorption of innovation, including technology transfer,
- development of tourism, recreation and cultural heritage protection

In addition to promoting the use of cultural assets and general infrastructure development, the Strategy highlights the need for a developed network of high schools, post-graduate schools and universities educating tourism staff, well-prepared to work in tourism services.

The Department of Social Development and Labour Market (Unit of Tourism), Lower Silesia Marshal's Office has the Tourism Development Program for the Lower Silesian Voivodship 2009. It notes the changing nature of society (participation in decision-making, based on networks not hierarchies etc.) and states that the tourist development strategy had its priorities amended to take account of European funding opportunities. Amongst other priorities are:

- even development of tourism in the region – focus on areas currently less visited by tourists
- increasing the quality and competitiveness of leading products and tourist attractions
- preparation of separate training programs for individual parts of the tourism sector
- implementing a local identity-building program at school level primary, middle and secondary schools - increasing the level of knowledge about the region among residents
- stimulating the interest of the local community in undertaking activities in the tourism sphere and shaping pro-tourism attitudes among residents
- raising awareness of the importance of this branch of the economy among local decision-makers including heads of local government units (commune heads, mayors).
- working on cross-border activities and collaborations
- The Lower Silesian Tourist Organisation is an association established by the local authorities. It is charged with:
  - Promoting Lower Silesia as an attractive tourist region in terms of culture and nature
  - creating a positive image of the region in the country and abroad from the tourist's point of view
  - cooperating with the local government administrations for the promotion of tourist traffic and the arrival of tourists to Lower Silesia
  - cooperating with representatives of governmental authorities - voivods, local government, the Chamber of Tourism and other organisations and associations in the tourism industry

- organizing training and staff development for tourism purposes
- inspiring and participating in the creation of local tourist organisations in communes and counties

The Lower Silesia Chamber of Tourism is the grouping of tourist-related businesses in the region.

## LOCAL LEVEL

An important starting point for the local approach to sustainable development, including tourism, is to be found in the work of the Karkonosze Commune Association. A document, the Karkonosze Theses – produced following a widespread participation exercise of residents, civil servants, experts, businesses etc. have been adopted by many organisations – and discuss the relationship between development and civil society. The Karkonosze Society and the Karkonosze Foundation are two organisations amongst many which protect and share the common principles.

The Municipal Office in Mysłakowice operates in the case study area; the Tourism Support Programme (2016-2022) of the Mysłakowice Commune is produced and maintained by a large number of operators in the area – tourist associations, commune groupings, academics, environmental groups etc. The Tourism Support Programme is, in part, a response to the Community Development Strategy (which noted strong cultural and heritage assets in an area experiencing massive social and economic change, with agriculture and tourism as the key planks for future success). The Programme's starting point is that tourism is a market-led activity, but that by working together, local people and organisations can strongly influence the direction of that activity and can contribute to sustainable economic and social benefits for all.

The commune identifies itself as 'a tourist commune' and its goal is to be seen as a tourist commune with harmonious spatial development, well-kept, with an optimally used natural and unique environment with a cultural heritage. To achieve this by:

- developing and strengthening the tourism identity (linking to the regional image).
- systematic development of tourist infrastructure.
- implementing tourist information systems.
- effective tourist promotion (in connection with regional promotional activities).
- improving the image of the commune (engaging local residents to maintain high standards etc.).
- increasing the number of businesses in the development of tourism.
- efficient and effective tourism management.

Considerable thought has been given to engaging local residents in all aspects of making the 'tourism commune' a reality.

Janowice Wielkie is a second community in the Case Study Area. Its development strategy identifies tourism development as a significant opportunity for the general socio-economic development of the whole area. A fundamental feature is the protection of the natural and cultural environment. The under-developed tourist infrastructure and weak tourist promotion of the municipality are weaknesses – and the more attractive tourist offer of neighbouring communes is regarded as a major obstacle.

The whole Case Study area is characterised by a very active range of interest groups, institutions, cultural guardians, activity promoters etc.

## 2.10 Media Tourism, Scotland UK

Scotland is one of the constituent nations of the United Kingdom. Both Tourism and Culture are devolved powers and Scotland has control over both. The UK Government has powers which do impact on Tourism (notably in transport and some regulatory powers), but its relationship with Scotland on tourism issues as a whole is consultative. It is appropriate to treat Scotland as the National Government for the work on Tourism and Culture in that country.

### NATIONAL LEVEL

Responsibility for Tourism in Scotland has recently changed from the Cabinet Secretary for Economy, Fair Work and Culture to the Cabinet Secretary for the Rural Economy and Tourism, emphasising the importance of the rural economy as a key contributor to Scotland's economy as a whole and of tourism's place in that.

The 2015 report 'Scotland's Economic Strategy' indicated that tourism was one of six economic sectors on which the government would focus and indicated many areas of financial support, with a particular emphasis on fragile communities. Two pillars formed the basis of the strategy:

- Increased Competitiveness
- Tackling Inequality

A delivery programme for the Economic Strategy - 'Protecting Scotland's Future: the Government's Programme for Scotland 2019-2020' - set out many actions concerning tourism:

- minimise the burden of regulation and associated cost
- recognise the essential role of marketing Scotland at the UK and international levels
- provide sustainable support to enable the industry to deliver high quality, value-for-money and memorable experiences
- support the growth of a skilled, professional and inclusive tourism workforce
- continue investment in Scotland's digital infrastructure to accelerate growth
- consider how to ensure that transport policies, practice, taxation and the industry's tourism strategy work best together for the benefit of the Scottish economy

Scotland's main Tourism Strategy 'Tourism Scotland 2020', was produced in 2012 on behalf of the Scottish Tourism Alliance, a public/private partnership involving key industry players with governmental and third sector representation. The Strategy identified key markets, set out 'Authentic Experiences' to attract visitors, indicated the areas which needed to be addressed to improve the visitor experience (infrastructure) and identified the capacities (leadership, collaboration, training) which required development. The metrics used to gauge success were 'overnight visitor spend' and 'visitor satisfaction'.

A mid-term review of the Tourism Strategy (in 2015), found that the direction was largely appropriate, but identified four areas on which to focus:

- Digital
- Leadership
- Quality of Visitor Experience

- Investment in Infrastructure

A further exercise in 2019, involving 2,500 tourism leaders and stakeholders, developed a new ambition for ‘Scotland Outlook 2030’ with a stated vision to be ‘the world leader in 21st Century tourism’. This will be achieved by addressing:

- Digital - harnessing the power of technology and data
- Policy - having the right policy and regulatory landscape in place
- Investment - ensuring we have access to investment
- Connectivity - proactively investing in the right transport and digital connectivity
- Business network - providing a strong support network for our businesses
- Positioning - successful positioning of Scotland and its tourism industry

VisitScotland is the National Tourism Organisation. It has a regional presence in ten regions of Scotland and its prime role is to deliver the government’s economic objectives through tourism. As a non-departmental public body, it also acts as an adviser to Scottish Government Ministers, provides financial and advisory support to tourism businesses and has delivery programmes for each aspect of the national Tourism Strategy. The Digital Tourism Scotland initiative is an enhancement of the broad aims of the Tourism Strategy.

The 2020 Culture Strategy for Scotland is the first national culture strategy for a decade. It is a very broad strategy covering heritage, community activity, arts, tourism, cultural industries, creativity etc., with three pillars:

- Strengthening Culture (including the production of culture through activities, industry, partnership, international collaboration etc.)
- Transforming through Culture (using culture in all aspects of society - health and wellbeing, economy, education, reducing inequality and realising a greener and more innovative future)
- Empowering through Culture (celebrating Scotland’s culture and developing community activity via local and national organisations and charities)

The Culture Strategy has a context including Article 17 of the Universal Declaration of Human Rights (‘participate in the cultural life of communities...’) and the landscapes, languages and geography of Scotland.

Creative Scotland is a non-departmental public body of the Scottish Government supporting the arts, screen and creative industries and placing Scottish culture in an international setting. It is promoting Scotland as a film location with support for film-making, and encouraging ‘screen tourism’.

Other significant bodies are the National Trust for Scotland (a conservation charity which protects Scotland’s natural, built and cultural heritage) and Historic Environment Scotland (a public body which conserves and researches Scotland’s historic environment, regulates, advises and educates).

## REGIONAL/LOCAL LEVELS

Scotland has no regional administrations and the 32 local authorities have no specific responsibilities in Tourism or Culture, but most have well-developed local strategies, usually developed in conjunction with the Scottish Tourism Alliance and VisitScotland. As an example, Edinburgh City Council – a somewhat over-touristed city, hosting many major international festivals – has a draft Tourism Strategy 2030, developed over two years ‘From Driving Growth to Managing Growth’ which follows many of the principles of the National Strategy, but takes particular cognisance of the impact of tourism on residents. Another example, Scottish Borders, has a strategy to address its low level of tourism activity

and is promoting its own 'brand' and developing a private delivery vehicle in partnership with neighbouring authorities.

## 2.11 Nitra, Slovakia

### NATIONAL LEVEL

Tourism in Slovakia is addressed nationally through the Ministry of Transport and Construction which in 2017 'directly assumed responsibility for the presentation of Slovakia as an attractive tourist destination.' Whilst activity is currently based on the Tourism Development Strategy 2020 (produced in 2013), the way forward is described in the outline of the 2030 Strategy for the Development of Sustainable Tourism. It is based on the Government Agenda 2030, taking into account the need for building a uniform presentation of the country and the appropriate use of natural and cultural resources. In this context, the aim of the development of the tourism sector 'is to strengthen its position in the national economy by supporting the creation of products with higher added value and to respond flexibly to the current and future needs of the sector.'

Tourism is seen as one of the key factors in the development of the national economy; the main tourism goal of the new Strategy is 'to reduce seasonal disparities by creating a comprehensive tourism offer, using the country's potential to increase the economic growth of regions and improve the recognition of Slovakia as an attractive and authentic holiday destination.'

Many additional factors are given priority:

- Sustainability and protection of the environment
- Better partnership working
- Improved tourism products
- Creation of 'Green Jobs' – in particular, jobs for graduates
- Improved transport links and facilities
- Improved health of citizens

Considerable emphasis is given to the integration of the Strategy with other relevant Programmes and strategies at World, European and national levels, particularly those with funding potential and/or environmental protection objectives.

As part of the Minister's remit to improve promotion and marketing, the Slovak Tourism Agency – with those objectives - was integrated into the Ministry of Transport and Construction.

The Ministry of Culture has the Culture Development Strategy for 2014 – 2020 which presented a holistic approach to culture as an integral part of national life. It criticised previous cultural strategies for being the creature of the State. Rather, it describes Culture as one of three pillars (the others are Economy and State) which are interacting components essential to developing Slovak society. The potential of culture is presented, both physical and intangible culture (quoting folklore, local languages and aesthetic and ethical values). The links with tourism are seen as essential – not merely for the economic contribution, but also the presentation of Slovak culture to visitors improves the image of Slovakia to the visitors and, as important, to the citizens, reinforcing pride and identity.

A Strategy for the Protection of Monuments Fund (2017-22) seeks to enhance the capital value of cultural monuments, creating economic opportunities for jobs and tourism.



Office of the Government (Regional Development Section) set out its strategy in 2017: National Strategy for Regional and Territorial Development of the Slovak Republic to 2030. The Strategy is founded on the UN Sustainable Development Goals and sees a Slovakia with growing municipalities and cities with a quality, safe environment for residents, businesses, investors, visitors and tourists; in this regard, Regional Tourism Associations are a required feature. Considerable cross-departmental working and cooperation with all sectors of society are seen as important in working towards the vision.

## REGIONAL LEVEL

The Office of the Nitra Self-Governing Region is the primary regional body. Its Economic and Social Development Programme 2016 – 2022 follows very closely the National Strategy for Regional and Territorial Development and looks towards EU Cohesion Policy. The Strategy identifies areas for improvement – under-developed assets, low employment skills, poor social infrastructure, poor transport facilities etc. It prescribes:

- creating the conditions for the high added
- creating a stimulating environment for innovation
- supporting rural development
- improving conditions for tourism development

To achieve the latter, the region needs to:

- develop tourism infrastructures and facilities
- develop human resources
- create Destination Management structures
- generate public/private cooperation

The Strategic Plan for Tourism Marketing (2014-20) states that the region is the ‘least touristed’ region in Slovakia, but has enormous potential, including being both near, and easily accessible from, suitable large markets. Cross-border opportunities are very attractive and the Strategy takes particular note of the Danube Strategy.

The immediate marketing programme concentrates on domestic tourism, arguing that this is likely to extend the tourist season and sustain improved facilities. It is noted that there are insufficient tourism organisations, with the main activity focused on the regional capital; local people do not strongly support tourism and tourism employment is not seen as attractive.

## LOCAL LEVEL

The key body is the Municipal Office of Nitra, which in 2008 produced The Concept of Cultural Development of the City of Nitra. Framed by the National Strategy, the cultural development programme identifies monuments and artefacts, together with major events and activities. The Department of Culture, Sports and Tourism are extremely active in promoting events, concerts, celebrations, the arts, community activities etc. The target is largely residents and domestic visitors. The lack of sufficient tourist-related businesses, facilities to attract longer-stay visitors and strong identity (of Slovakia and the region) are seen as obstacles to growth. A more recent document, A Programme of Economic and Social Development for the City of Nitra 2015-23 reveals a change in orientation and the development goals identify the city as a hub for promoting tourism in the region. The change is also reflected in the work of the Nitra Tourist Board, a public/private organisation, which builds on the approach through Concept of Tourism 2018-20.

## 2.12 Piedmont Landscape and Literary Park, Italy

### NATIONAL LEVEL

Responsibility for Tourism at the national level in Italy has undergone some recent changes. In terms of economic development, the Ministry for Economic Development focused more on industrial production than tourism (which, in any event, was formerly a brief in the Ministry of Culture). Early in 2019, a major reorientation – and reorganisation – took place. Responsibility for tourism was transferred to the Ministry of Agricultural, Food and Forestry and Tourism Policies. The previous policy of emphasising tourism in cities now moved heavily towards a regional, more rural, ‘terroir-based’ approach. This arrangement did not last and in August 2019, responsibility was transferred to the Ministry for Cultural Heritage and Activities and Tourism.

The Ministry of Culture had a Strategic Plan for Tourism 2017-22. This addressed:

- homogeneous identification of public structures dedicated to guaranteeing tourist services;
- program agreements with the regions and development of tourism structuring on the territory national training projects to promote tourism development;
- support and assistance to companies that contribute to requalifying the national tourist offer;
- promotion of the image of Italy, in the tourism sector, within national borders, with particular regard to tourism systems of excellence, guaranteeing equal opportunities in the territory for propaganda and unitary communication;
- organization of moments and events of a national nature, with a tourist impulse involving territories, public and private subjects;
- connection and cooperation between regions, provinces and municipalities and government institutions;
- promotion (for tourism) of the ‘Italy’ brand.

A Standing Committee on Tourism was established, based on the key points of the Strategic Plan for Tourism. The intention was expressed to develop the ‘made in Italy’ brand and to ‘build a real industrial tourism policy’.

The National Tourism Agency takes a very wide and international view of tourism; its annual plan keeps track of tourist numbers, origins and particularly, trends (in both patterns of movement and types of tourism/accommodation/travel etc.) The emphasis is on adding value and sustainability and the Agency has a regional presence.

### REGIONAL LEVEL

The Piedmont Department of Culture, Tourism, Trade and Tourism brings together the relevant functions under one umbrella. This is supported by Department of Budget, Finances, Economic and Financial Planning which, although it addresses tourism only obliquely, has a wide range of financial support to start-ups and small and medium-sized businesses operating in relevant activities to ensure tourism growth.

In 2018, the Region carried out a major consultation and planning exercise involving tourist bodies (including the local ATLS – tourist bodies responsible for information, creation of local activities etc.), local and regional agencies, businesses and the public. The project was usefully located in the context of international, national and regional trends, sought the views of stakeholders in relatively local areas

and was able to produce tailored priorities pertinent to each locality. Local resources, distinguishing characteristics and attractions were identified and packaged to produce relevant marketable identities. Not only this, but each locality was able to identify what was needed to make the plan become a reality – whether that was improved transport links, training for specific skills or better profile for local features. Whilst the overall thrust for the region as a whole was based on ‘Outdoor, Oenogastronomy, Culture and Sport’, each locality identified the balance between these poles and added in other key market targets. Localities were particularly keen to add in specific cultural festivals of high local significance.

‘Cultural Tourism’ is not well defined at either national or regional levels. The very high local enthusiasm for what is culturally relevant and unique appears not to be encapsulated in strategic activities by either state or tourism bodies.

### **LOCAL LEVEL**

Local government in Italy has been heavily reduced and many of the previous functions have been transferred to the regional level.

### **COMMUNITY LEVEL**

Municipality of Alba: the mayor has considerable influence on local priorities; in the field of tourism, the top events and attractions are considered to be the White Alba Truffle Annual Fair and the promotion of historical villages and folklore.

At local community level, an important organisation for the case study is the Associazione Centro Studi di Letteratura, Storia, Arte e Cultura Beppe Fenoglio dedicated to the work and memory of the writer.

## 2.13 Southern Moravia, Czechia

### NATIONAL LEVEL

Whilst the Ministry of Industry and Trade does not have the Tourism brief, it does identify tourism as a significant factor in the Czech economy and seeks to direct capital funds to improve infrastructure which will support tourism, including transport, buildings etc.

The Ministry of Regional Development is the ministry with prime responsibility for tourism and travel. Responsible for programming and coordination, in 2013 the Ministry produced 'The State Tourism Policy Concept in the Czech Republic from 2014 to 2020'. The Policy Concept – and its implementation – is monitored on an annual basis. The aim of the policy is primarily an economic one with an emphasis on GDP and employment; it seeks to ensure the development of tourism as an economic sector.

In taking a broad-ranging view of tourism, the Policy Concept notes that the means of implementing policy is fragmented through a range of ministries, levels of government and other bodies. A theme of the policy is to seek to bring together some of the disparate elements and this has been a continuing issue in the annual reviews. The Policy Concept identifies a very wide range of interested parties, including the Ministry of Agriculture (agro-tourism, regional products etc. being integrated into a 2030 Concept of Development for Agro-Tourism), Ministry for the Environment (sustainable tourism, environmental protection, use of the environment to create employment), Ministry of Culture, Ministry of Foreign Affairs, ministries with educational and training responsibilities for potential tourism sector workers and management. To bring together these disparate elements, a range of coordinating bodies and organisations are promoted and/or managed by the Ministry, including the Tourism Forum.

- The Policy Concept identifies four priorities:
- Tourism Product Development
- Tourism Management
- Destination Marketing

#### Tourism Policy for economic development

The first of these include improving the use of natural and cultural-historical attractions for tourism; reconstruction of the most important cultural, historical and technical monuments; use of the heritage of living and inanimate nature; it anticipates progress on implementation will be largely dependent on EU funding being available.

The Ministry of Culture is largely focused on a national audience with priorities including:

- promoting cultural identity, cultural diversity and intercultural dialogue
- strengthening national and cultural identity
- supporting research on national and cultural identity
- developing creativity: support for cultural activities and creation of cultural goods
- provision of public cultural services

It seeks to protect and build on cultural assets and to identify, preserve and develop cultural landscapes. Some of its efforts are addressed to reducing the pressure on the most important cultural assets by spreading visits through more of the year and by developing interpretative technologies.

## TOURISM INDUSTRIES

Under the umbrella of the Ministry of Regional Development, CzechTourism is the arm responsible for practical action, including the marketing of Czechia internationally and domestically as a tourist destination. The primary thrust is to increase the volume and length of tourist visits to support the domestic economy. CzechTourism seeks to develop new tourism products, promoting city life, cycling, spas, festivals etc.

The Tourism Forum is an independent communication platform to coordinate and promote the interests of the business sphere in tourism; priorities include improving cooperation and promoting change. Membership includes 13 professional associations, the Association of Regions, the Association of Tourism Organizations, the Czech Heritage of UNESCO, the National Network of Local Action Groups, the Union of Towns and Municipalities, the Association of Small and Medium-Sized Enterprises and Self-Employed Persons and the Czech Bishops' Conference of Church tourism. It provides some training for members.

## REGIONAL LEVEL

The responsible regional body is the South Moravian Region. It has two major relevant policy documents which provide programmes to 2020 and describe some of the problems and opportunities facing the tourism industry in the region.

The Development Strategy of the South Moravian Region 2020 provides an economic framework for the programming period with four main themes:

- Competitiveness (dealing with research and innovation; education; international networks)
- Social Cohesion (shared values; maintaining traditional values; quality of life and inclusion)
- Infrastructure (transport, information and environmental development)
- Balanced development (addressing intra-regional disparities including better transport links; focus on agriculture and tourism in the disadvantaged areas)

The priorities identified would assist tourism by relevant infrastructure improvements (transport etc.), but tourism is not addressed as an explicit priority.

The second key document is Tourism Development Programme for the South-Moravian Region 2014-20. The policy document highlights priorities including:

- to support the establishment of adequate and effective organizational structures in the individual tourist areas of the region;
- improve tourist infrastructure;
- to create competitive and targeted tourist products;
- marketing and accessibility;
- distribution of tourists to a wider range of locations.

## REGIONAL TOURISM

At the regional level, culture (buildings, monuments, folklore, festivals etc.) are well integrated with the tourist offering through the tourist agencies and particularly the Tourist Authority of South Moravia – a joint operation of the Regional Authority, Brno City and the Czech Confederation of Commerce and Tourism. The Tourist Authority follows the tourism priorities of the Regional Authority (including reducing pressure on popular venues) and:

- supports cooperation with relevant bodies
- develops human resources
- promotes the development of new tourism products
- helps to package complementary tourist offers
- carries out marketing
- acts as an information resource for tourists and providers

To support destination management and cooperation of tourism service providers, the South Moravia Tourist Board divided the region into five tourism areas (Brno surroundings, Moravian Karst and surroundings, Znojmo and Dyje valley, Pálava hills and Lednice-Valtice area, Moravian Slovakia). Destination management operations have been established in these areas, bringing together municipalities, entrepreneurs and non-profit organizations in tourism. Their task is to support cooperation in the region, provide information and education, cooperate with other tourism institutions in the Czech Republic and evaluate tourism traffic to optimize it in space and time.

## LOCAL LEVEL

The Case Study area is covered by (but is not coterminous with) four Local Action Group areas - Lednice-Valtice, Hornácko and Ostrožsko, Hustopeče and Gate of Brno. Local Action Groups are local community bodies representing local socio-economic interests - public and private, citizens' groups, non-profit organizations, private entrepreneurs, municipalities, associations of municipalities, etc. Their common goal is the development of their area - the rural region and its agriculture and in obtaining financial support from the European Union and national programs for their region. The priorities for the four groups are strongly in line with the Regional Tourist Development Programme, with an added objective of avoiding the Case Study area becoming a dormitory satellite of Brno.

A strong focus in each case is the protection and development of both the natural and the heritage environments and the development of relevant tourist products.

Another entity at the local level is voluntary associations of municipalities. Their goal is usually general cooperation in micro-regions, however, tourism and promotion of the micro-region are among the standard tasks. These associations tend to be collective members of the LAGs. In the Case Study areas, there are the voluntary associations of municipalities (VAM): VAM Lednice-Valtice area, VAM Modré hory (Blue Mountains), VAM Hornácko, Association for Development and Renewal of the Vranov Region, VAM microregion Ivančice.

## 2.14 Styrian Iron Route, Austria

### NATIONAL LEVEL

Austria has two Ministries with a specific focus on Tourism (with the addition of the Chancellery which takes a strong interest in European and other funding). That with prime responsibility is the Ministry for Agriculture, Regions and Tourism, which holds 'Plan-T – The Masterplan for Tourism'. This was an extensive participation exercise during 2018 and 2019 with over 500 participants from every aspect of the tourism industry and other related activities and functions. The Plan is a process, a continuing process, and is not fixed for the duration; annual action plans will be produced. It represents the first national tourism plan for a decade and addresses what it describes as the leading industry of the 21<sup>st</sup> Century.

Very strong attention is addressed to *cooperation* – it is recognised that tourism is a holistic operation and all aspects of national life need to be engaged. The Plan identifies a currently fragmented industry and describes a range of structural changes, actions and active work to develop collaboration across all sectors and institutions.

There is a move from a single-minded focus on *tourists* to the identification of three pillars to be addressed:

- Visitors
- Entrepreneurs and employees
- Local population and the Environment.

A balanced plan will address the needs of all three dimensions. Interestingly, the metrics for assessing tourism have been adjusted in line with the pillars – again, the emphasis is not solely on visitor numbers and accommodation usage; share of GDP, added value, employment, revenue per available room, guest satisfaction, debt repayment, the share of renewable energy (by gastronomy and accommodation) and arrivals will all be measured and taken into account to judge success. To achieve added value (and specifically added regional value), the Plan examines the link between Tourism and Agriculture, seeking improved identification and marketing of regional products. The second pillar sets out plans for support to business - within this, there is a desire to strengthen family and owner-managed businesses as the backbone of Austrian tourism through financing and support mechanisms – to increase the quality of employee experience and to provide extensive education and training (including digitisation). The third pillar sees environmental considerations and residents' quality of life as vital.

The whole T-plan is framed in the context of the UN 2030 Agenda for Sustainable Development.

The Ministry of Digital and Economic Affairs has an important role in developing tourism in Austria. Echoing the theme of the T-Plan, policies in the Ministry of Digital and Economic Affairs are well-coordinated to deliver appropriate actions. Again an emphasis on education and training features highly; the priority in the T-plan for tourism businesses and workers to embrace digitalisation is supported in this Ministry which is allocating 50% of its digitisation budget for qualification networks to tourism. The security of tourists is addressed - "System Austria" is intended to be crisis-proof; data security and resilience are a key component.

Formerly a responsibility of the Chancellery, the Federal Ministry for Arts, Culture, the Civil Service and Sport is, from 2020, responsible for aspects relating to culture – collections, the preservation of the existing wealth of culture, and providing information and education about Austria’s cultural heritage. Whilst the links with tourism policy are represented, there is considerable emphasis on close engagement with European Cultural Policy and International Cultural collaborations are in evidence.

## REGIONAL LEVEL

At the regional level, the Styrian State Government has a State Tourism Strategy 2025. This seeks to capitalise on the innovative strength of the region, with its emphasis on training, self-employment and entrepreneurship. There is a desire to supplement the dependence on visitors from Austria and the neighbouring countries with more international visitors and the motto is ‘Growth through Quality’. The Strategy is in line with the national strategy of seeking increased digitisation and recognising climate change as a significant factor; the strategy builds on the potential for regional gastronomy to be a contributing factor in establishing and promoting the identity of the region. The region has two strong themes – first the innovative and dynamic spirit in the region, built on the tradition and modern expertise in materials technology and second, the quality of life aspects built on the reputation for spas and adding in many ‘wellness’ and ‘healthy environment’ dimensions, branded as ‘Hochsteiermark’.

The Department of Economy and Tourism has a dedicated Tourism Unit which deals with tourism promotion and marketing, advice to local businesses and tourism projects, regulation of tourism activity, tourism tax collection. It provides an information portal for municipalities and local tourism associations. The Department for State and Regional Development is responsible for EU funds, management of EU programmes (including local cross-border international territorial activities and rural schemes), coordination of the municipalities, bringing together planning and development expertise, promoting growth and employment.

## LOCAL LEVEL

There is a dynamic network of parties operating at the local level. The 21 municipalities have responsibilities in the Case Study area, but other local organisations play a key part in the tourist offering, including the larger companies operating in the area, Chamber of Labour, the Austrian Federal Chamber, the Museum Association Styrian Iron Route, the Ore and Iron Regional Development GmbH. Given the legacy of industry in the region, a key player is the European Route of Industrial Heritage (ERIH), a network of cultural heritage regions with industrial backgrounds. A common concern is that the tourist market is heavily dependent on day trippers from neighbouring areas and that it will be necessary to generate longer-term visitors to make a significant economic impact.



## 2.15 Beit She'an Valley, Israel

### NATIONAL LEVEL

The general approach to tourism in Israel is strongly shaped by the Ministry of Economy and Industry - 'a major leading economic entity in Israel'. Its focus is on economic growth, effective use of human capital and the promotion of international trade and commerce; an additional objective is to reduce the cost of living for both residents and visitors. Tourism is identified as one of the three most important industries in the country; one of the spin-offs from international tourism is anticipated to be the attraction of investor funds for infrastructure development.

Responsibility for tourism itself lies with the Ministry for Tourism. The Ministry of Tourism also describes itself as an economic ministry, whose primary aim is to increase economic activity. The Office of the Minister is responsible for determining policy; it aims to increase the number of tourists entering Israel and to maximise the income generated. Whilst it also addresses domestic tourism, the main thrust of its marketing effort is to international and conference audiences; it seeks to strengthen the country's image, to preserve existing markets and target audiences and to develop new markets. Amongst its aims are:

- to develop public tourism infrastructures
- to develop new tourist products and packages
- to improve product quality and adapt the product to target audiences
- to increase the accessibility of tourist information
- to reduce vacationing prices
- accreditation of accommodation and tourism services

A major element of the work of the Ministry of Tourism – to meet its economic remit - is to promote inward and home-grown investment. It has set a target of increasing demand, but to support that by adding 'thousands of new hotel rooms to the nation's stock'. The Centre for Tourism Training and Advice provides advice and services to entrepreneurs to establish or expand small and medium-sized tourist businesses. It runs 'Tourism Incubators' for those businesses, drawing additionally on input from government and non-government bodies including the Ministry of Agriculture, the Ministry of the Economy and Industry Small Business Development Centres, the Centre for Economic Development and local non-governmental tourism enterprises. Grants are offered for new construction and expansion of hotel facilities.

Another National Ministry, the Ministry for the Development of the Periphery, the Negev and the Galilee, seeks to develop growth and prosperity in these regions, to generate activity in low-intensity areas and to promote the development of infrastructure in coordination with the various government ministries. It operates in the fields of non-formal education, of housing and urban development, employment, quality of life, leisure culture and addresses social and community aspects. The Ministry seeks to encourage entrepreneurs and investors to undertake activities and works through the statutory corporation, the Galilee Development Authority.

Given the emphasis on investment in infrastructure, the role of planning in Israel is significant. The Ministry of the Interior hosts the independent Israel Planning Authority which is responsible for land use planning. In 2016, Tourism Infrastructure was added to its remit as being part of required National

Infrastructure (although tourist infrastructure projects do not feature in the Prime Minister's Infrastructure for Growth report 2019). The National Infrastructure Committee is a "one stop shop" for the investor and will support, under the guidance of the Ministry of Tourism, the processing of tourism infrastructure projects from conception to the approval of building permits. Besides, the Israel Land Authority has responsibilities over the use of state and other lands in the public domain (93% of the land in Israel).

The Ministry of Culture and Sports is largely concerned with national cultural and sports activities but cooperates with the Ministry of Tourism on a range of issues. However, the main tourist-focused cultural organisations are those concerned with archaeology and Heritage. Bodies such as the Ministry of Jerusalem and Heritage, the Israel Antiquities Authority, the Israel Archaeological Survey and the Society for the Preservation of Israel Heritage Sites are active in presenting some of the attractions which bring international visitors to both the 16 World Heritage Sites and the extensive range of buildings and artefacts from cultures through the ages. There are also organisations presenting the natural resources of Israel – national parks, nature reserves etc. - including the Israel Nature and Parks Authority.

## REGIONAL LEVEL

Israel does not have a formal regional structure and many of what would be regional issues are handled by the national government. As a result, local government and significant local issues are handled by many collaborations, joint working arrangements and delegations from the national government (An example is the Galilee Development Authority, an executive arm of the national Ministry). Coordination of the work of 94 local authorities results in activity across every sphere of life in Galilee and integration with the work of the various national Ministries.

## LOCAL LEVEL

There is a system of Regional Councils, which bring together the work of several local municipalities – the Valley of the Springs Rural Council, for example, seeks to preserve rural and agricultural space and to diversify the economic base of the localities with an emphasis on entrepreneurship and rural tourism. It undertakes participative programme development with local residents.

The Town Council for Beit She'an promotes tourism. Its Master Plan includes the following:

- the addition of hundreds of units of accommodation and development of additional attractions.
- "Peaceful tourism" - the development of a unique style of tourism, built on getting to know the area in depth, while integrating the locals with visitors to the area.
- Springs Park - experiential transportation and attractions between the springs.
- Huga Gardens - water park and camping accommodation.

Springs Valley Trail - An education, community and tourism trail that encompasses the entire valley

Cross-border activity with authorities in Jordan include agriculture, culture, education and sports; it is anticipated that this work will expand to include tourism and employment-related functions.

### 3 POLICIES, PRACTICES AND STRATEGIES (APPENDIX B: ORIENTATION MATRIX)

This spreadsheet shows broad themes for each of the partners

Case Study	Tourism Responsibility			Role of Culture (Ministry/dept focus)	Guiding Concepts	Interesting or distinctive areas (to be re-fined/explored)
	National	National Implementation	Regional			
Art Nouveau, Barcelona, Spain	Ministry of Industry, Commerce and Tourism (with a Secretary of State for Tourism)	'Collaborative Governance', but largely delegated to the Autonomous Regions	Catalan Ministry of Business and Knowledge (via the Catalan Tourist Board). Barcelona City Council is a major player.	Nationally to provide a framework for promoting, preserving and strengthening heritage and culture (and providing legislative and taxation support). Case Study is based on strong local/regional cultural assets	(Barcelona) 'City as Tourism' Tension as overall economic gain is not perceived by residents and the City government as benefiting them and/or worsening the quality of life for local people	Each separate policy - transport, housing, social etc. shares the same broad understanding - strong coherence
Buzau Carpathians and Sub-Carpathians, Romania	Ministry for Public Works, Development and Administration	The Ministry	South-East Regional Development Agency	Identification of funding priorities; respect for cultural rights and culture as a public service	The technical approach to determining priorities; alignment with external funding requirements; focused on programme delivery	The relevant Smart Specialisation Strategy seeks to build on high-performing sectors. Tourism infrastructure has a low priority and there is less focus on poorer, less developed localities.
The Cyclades, Greece	Ministry of Tourism	Greek National Tourism Organisation	Decentralised Administration of the Aegean, together with a Regional Service of the Ministry of Tourism	Focus on preservation, investigation and education; emphasis on both ancient and modern; Greece's historic contribution to European culture	Legacy of many separate themes/initiatives; major policy change to bring a coherent national approach in an economic context	Policy development may be in advance of the organisational capacity of the Ministry of Tourism at national and regional levels

Case Study	Tourism Responsibility			Role of Culture (Ministry/dept focus)	Guiding Concepts	Interesting or distinctive areas (to be re-fined/explored)
	National	National Implementation	Regional			
Ida-Virumaa, Estonia	Ministry of Economic Affairs and Communications	Estonian Tourist Board under Enterprise Estonia	The collaboration of a large number of cities and rural authorities	Preservation of language, heritage and culture; working for beneficial co-existence of minorities	Economic growth in a competitive environment	Cultural Heritage and Cultural Diversity addressed separately. Tourism to add to local demand to allow sustainable public services
Kinderdijk, Netherlands	Ministry of Economic Affairs and Climate	Independent Foundation: Netherlands Board of Tourism & Conventions	Province of South Holland	Preservation and interpretation for a national audience; engaged internationally with World Heritage Sites	Nationally: 'Every resident will benefit'. Regionally/Locally: 'We have a crisis'	Spatial planning has a high profile. Attempting to solve a previously unsolved problem - citizen/iconic attraction conflict
Komárom, Hungary	Ministry for National Development	Private Sector Organisation- the Hungarian Tourism Authority	Komárom-Esztergom County	Actively engaged with national and international tourism	Poorly-performing tourism industry with very low investment in infrastructure; cross-border activity is essential	Tourism strategy starts with state intervention, moving after five years to state drawing back and promoting private activity
Lusatia, Germany	Federal Ministry of Economic Affairs and Energy	(Seen as a regional responsibility according to the German federal system)	Ministry for Economic Affairs, Labour and Energy	The national focus is on preservation and restoration, with an emphasis on remembrance. Embracing European identity. Regional attention to cultural tourism	Marketing. With collaboration and partnership at every level; consistent message; strong focus on rural and 'lagging behind' regions	Linking of Training/Coaching and partnership working under the main policy thrust of Marketing
Ljubljana City, Slovenia	Ministry of Economic Development and Technology	Tourism Directorate of the Ministry and the Slovenian Tourist Board	(not applicable)	Ministry is focused on national audience - seen as important for national identity	(Healthy body and mind)	Very positive change of direction to address the 'quality' tourist market.

Case Study	Tourism Responsibility			Role of Culture (Ministry/dept focus)	Guiding Concepts	Interesting or distinctive areas (to be refined/explored)
	National	National Implementation	Regional			
The Valley of Palaces and Gardens (Lower Silesia, Poland)	Recently changed - now Ministry of Development (formerly Ministry of Sports and Tourism)	Polish Tourist Organisation (Ministry of Development)	The Department of Economy, Lower Silesia Marshal's Office	Mainly focused on cultural assets, but notes the importance of contributing to a European identity	'Tourism Commune' Strong on local consultation.	Little sense of national drive to tourism. Locally, active engagement of residents with the concept of 'Tourism Commune'
Media Tourism, Scotland UK	Cabinet Secretary for the Rural Economy and Tourism	VisitScotland (public body)	(not applicable)	A very broad definition of culture with an emphasis on the participation and development of citizens and communities	Major participation exercise focused on Scotland becoming a world leader in Tourism - digital is high profile. Emphasis on benefits for rural and small communities	The linking of Tourism and community/rural culture is a multi-dimensional concept
Nitra, Slovakia	Ministry of Transport and Construction	Slovak Tourism Agency	Office of the Nitra Self-Governing Region	A holistic approach, engaged with the vitality of Slovak life and good connections to tourism, both national and international	Culture is one of three pillars, the others being Economy and State	Slovak Tourist Agency has a narrow role concentrating on promotion and marketing
Piedmont Landscape and Literary Park, Italy	Continuing changes to National Ministry responsibilities. There is currently a Ministry of Culture and Tourism.	National Tourism Agency	The Piedmont Department of Culture, Tourism, Trade and Tourism	Ministry very focused on the role of culture in tourism, with a prime international perspective	An approach based on regional identity and celebration of what each region has to offer. Strong on participation at the regional and sub-regional level.	Approach to Tourism is led regionally. Major participation exercises encapsulating local identity.
Southern Moravia, Czechia	The Ministry of Regional Development	CzechTourism	South Moravian Region	Largely focused on a domestic audience, but encouraging practical engagement with culture - creativity, product development etc.	Address the problems associated with lack of adequate infrastructure to support local and national economies	Very disparate range of actors: serial attempts at coordination, including a body to coordinate the coordinators

Case Study	Tourism Responsibility			Role of Culture (Ministry/dept focus)	Guiding Concepts	Interesting or distinctive areas (to be re-fined/explored)
	National	National Implementation	Regional			
Styrian Iron Route, Austria	Ministry for Agriculture, Regions and Tourism	Austrian National Tourist Organisation	Styrian State Government	National focus, but additionally strong engagement with European Cultural policy	(Regional) Celebrate the industrial past and the modern technologies derived from it, but focus on quality of life in the future	Change of metrics focusing on the wider objectives and not just tourist numbers etc.
Beit She'an Valley, Israel	Ministry for Tourism	The Ministry	Arm of National Government and collaboration between many municipal entities	Ministry is largely focused on domestic cultural and sporting activities. Much cultural activity is undertaken by Antiquities organisations and strong links with Tourism	Very economically focused and viewing tourism infrastructure development as being the realm for investors and developers	Land Use Planning has an important role. Tourism Infrastructure is seen as important, but limited national intervention to deliver it

## 4 SOURCES OF INFORMATION PER CASE STUDY (APPENDIX C)

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