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The role of the Union in the field of tourism

Commission Green Paper

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INTRODUCTION

The Treaty on European Union, signed on 7 February 1992 at Maastricht, acknowledges for the first time that European Community action, if it is to accomplish the tasks which it has been assigned, should include measures in the field of tourism, under the conditions and according to the timetable set out in the Treaty (Article 3t). In Declaration No 1¹ it also made provision that since tourism is a sphere referred to in Article 3t), the question of introducing a Title relating to it into the Treaty establishing the European Community be examined by the conference of representatives of the governments of the Member States which shall be convened in 1996 on the basis of a report which the Commission shall submit to the Council.

This major new departure reflects a growing awareness of three factors: the economic importance of tourism for growth and employment in the Union, the compatibility of adherence to the principle of subsidiarity with the need for Community-level action in this area not within the Community's exclusive competence and, finally, the need to introduce a degree of coherence and linkage in the three associated domains of tourism, consumer affairs and natural and cultural heritage.

Such were the conclusions of the discussions which preceded revision of the Treaties, beginning with an informal meeting of the Tourism ministers on 29 September 1990 in Milan and continued during the review of contributions submitted by various Member States in preparation for the Intergovernmental Conference (Italy and Greece in February 1991, Luxembourg in June 1991, the Netherlands in November 1991) and in the European Parliament, most notably when it adopted its Resolution of 15 July 1991 on a Community policy for tourism². However, as a result of the complex nature of the field of activity which the notion of tourism encompasses, the diversity of national approaches and the interaction of tourism with numerous other Community policies, the Treaty does not enter into the same degree of detail as regards specific objectives and implementation procedures for Community measures in the field of tourism as it does, for example, with regard to culture (Article 128) or consumer protection (Article 129A).

The purpose of this **Green Paper on the role of the Union in the field of tourism**, which fits within the framework of the discussions held at the informal meeting of Tourism ministers on 15 April 1994 in Athens, is therefore to facilitate and stimulate thought on the Union's role in assisting tourism, bearing in mind the report which the Commission is to submit to the Council by 1996 at the latest. Without prejudging the conclusions of the work in progress for the preparation of the intergovernmental conference in 1996, nor anticipating whether the Commission will submit any new proposal on tourism, the aim of the document is to open a wide consultation on the role of the Union in the field of tourism to all those interested in it, whether they be in the public or private sectors, or operate at regional, national, European or international level. This approach is justified by the very multidisciplinary and transversal nature of tourism and its interlinkage with various sectors of activity, which explains why several policies impinge on tourism³.

In fact, according to the European Parliament⁴ and the Economic and Social Committee⁵, in adopting a policy on tourism the European Union could help reveal the true interlinkage between the means made available to tourists and enterprises at Community, national, regional

¹ See Declaration No 1 on civil protection, energy and tourism, and Article N, paragraph 2 of the Treaty on European Union.

² OJ C 183/78. Article 6 of the Resolution, in particular, "again calls on the Intergovernmental Conference on Political Union to consider immediately the incorporation *expressis verbis* of tourism into the Treaties as an essential flanking policy for the creation of Economic and Monetary Union, even if the rules governing the free movement of persons, goods, services and capital in the internal market also embrace tourism".

³ The question of defining tourism, which is discussed in numerous spheres, is not taken up here.

However, annexed to this document (Annex 1) is a report of the discussions on this subject, and the data commonly accepted for defining tourism are identified.

⁴ EP 178.920/final of 18.1.94 and EP 185.379/final of 15.12.94.

⁵ ESC/1021/94.

and local levels and improve the effectiveness of these by synchronising the various levels of public support in this field.

Point 4 of the Resolution of 18 January 1994 on tourism in the approach to the year 2000, following Mr Cornelissen's report, "underlines that tourism should be identified as a strategic economic development priority, and that it should be given a specific status as an industry " and point 5 states that " while tourism is essential as an industry for the Community's economic growth, it is also an undeniable social factor, encouraging the recognition of diversity (of culture, topography and lifestyle) and the reduction of regional disparities"

In addition, in the European Parliament Resolution adopted following the report by Mme Diez de Rivera, surprise is expressed in the second recital that studies of tourism, which affects every European citizen, should hitherto have been largely restricted to the economic aspect, and the assertion is made that tourism can play an increasing role as regards the fundamental concept of European citizenship. Point 1 of this Resolution asserts that not only does tourism constitute one of the main sectors of activity in the European Union, but also, and most important, that it concerns all European citizens, in whose eyes it represents an inalienable social right, with regard to which they are becoming more and more demanding as regards quality. It feels that the tourist should, logically, be placed at the centre of a Community policy on tourism.

In this context, the Green Paper should make it possible to:

- describe the actions currently being carried out by the Community in the field of tourism and the instruments it already possesses for this purpose;
- conduct a more in-depth examination of the value added brought by the implementation of a policy at Community level;
- present the prospects for progress in this field, bearing in mind the options which could be envisaged for defining the future role of the Union in the field of tourism.

A. ACTIONS CARRIED OUT BY THE COMMUNITY IN THE FIELD OF TOURISM

I. TOURISM AND THE STAKES INVOLVED

1. *The growth of tourism*

All the economic analyses show that the tourist industry, which on average accounts for 5.5% of GDP in the Union, and almost double that figure in some Member States, is one of the sectors of activity which has enjoyed steady growth over a long period of time⁶.

The analyses also confirm that Europe remains the main driving force behind international tourism in terms of arrivals, revenue and flows to non-Community countries. Nevertheless, the loss of market share (approximately 11% between 1970 and 1994 in terms of arrivals and 14% in terms of receipts⁷ to the emerging destinations in Eastern Asia and the Pacific illustrates the capacity of these countries to respond to the requirements of the growing demand for tourism in a world market which is open to more competitors. However, market shares are only one aspect of the economic growth of tourism. On the one hand, the volume of tourist arrivals in Europe which seems to be continuing to increase in the medium term, must be seen in the light of evaluating the real or potential saturation point on the supply side. On the other hand, the quantitative growth of tourism demand - in absolute value or market share - is only one of the indicators of an increase in activity, which may be marginal in the light of trends in the profitability of tourist demand or in the competitiveness of tourism supply. Achieving the balance between quantity (particularly as regards mass tourism) and profitability (in particular the *per capita* profit expected) is basic to the future of the European tourist industry.

Thus, conditions are favourable for further growth in the numbers of tourists, particularly at international level, because of the ageing populations in the industrialized countries, higher levels of education, more widespread paid leave and shorter working hours. These are all grounds for forecasting a further expansion in short-stay holidays, more frequent holidays, and greater access to tourism for young people and retired persons⁸. Also, on the one hand, the probability of considerable expansion in weekend tourism may form a basis for an expansion in local tourism, which creates jobs in segments of the market relatively shielded from international competition. On the other hand, increased awareness of the opportunities for travel, facilitated by the advent of the information society which involves more than just better reservation facilities using more sophisticated technology, together with improved transport systems and reduced prices for air travel may either have a positive effect on the supply side of European tourism by boosting domestic and international demand, or, on the contrary, divert what has hitherto been a relatively captive demand to destinations outside the Community.

2. *The changes to which enterprises must adjust*

The supply side of European tourism must adjust to the globalisation of the market and the increasing competitiveness of new destinations, as well as to increased demand for tourism, particularly European tourism. Some common features can be seen in the strategies already

⁶ For a detailed analysis of recent tourist trends in Europe, see the EC publication "Tourism in Europe", DG XXIII-Eurostat, which is in the process of publication. Some basic indications of trends in 1994 are given in Annex 2.

⁷ Cf. World Tourism Organisation, Tourism in 1994 - Highlights, January 1995, Madrid

⁸ Besides these considerations, relating to demographic changes and socio-economic developments on the international scale, some observers consider tourism to be a typical example of the "global paradox" which will be a feature of society in the year 2000 and beyond. The spread of information systems and the offers of "virtual journeys" by the media will only increase the need for real journeys, cf. in particular John Naisbitt, "The Global Paradox", W. Marrow, 1994. On the increasing importance of the intangible economy, see Charles Goldfinger, "L'utile et le futile", Édition Odile Jacob, Paris, 1994.

employed by the main groups in the sector on two fronts, i.e. specialization in defined market segments, together with concentrated efforts to achieve international level, and differentiation between activities offered locally and internationally by developing segments which are often complementary.

However, several factors determine the capacity of tourist industry enterprises to implement strategies for adjusting:

- the need to adapt to the administrative and legislative environment which binds all enterprises, and which can in some cases be accompanied by provisions specifically aimed at the tourist industries, in particular from the point of view of protecting the tourist, or caring for the environment;
- the need to respond at short notice to the direct and immediate effect on demand of factors external to the industry, such as weather conditions, international events and natural disasters, which require rapid adjustment on the supply side. This is often difficult, since such events, or their magnitude, cannot be foreseen;
- awareness of the obviously local nature of the market or some branches of activities, which may give an imperfect perception of the developments in the international demand for tourism. Here in particular, the trend in demand is away from its being determined mainly in quantitative terms (availability of supply, price), and towards qualitative factors (environment, services, the personal touch). The increased demand for quality is reflected by a move towards less impersonal service for tourists. This does not necessarily mean that rationalizing the supply side of the tourist industry in the direction of mass production, in an effort to achieve economies of scale which could mean economizing on staff, offers a significant advantage in competitiveness. On the contrary, a strategy of adjustment can tend in such cases to break each segment of the tourism market down into sub-markets or small enclaves of activity, in which the competitiveness of the enterprises is established, in some cases in the absence of real competition;
- the advantage or disadvantage of the - often small - size of the enterprises in the sector⁹. Small businesses must cope not only with the effect of concentrations in the sector or general developments in international competition, such as the cost of services, but also with the problems of managing the business, marketing, using new technologies and innovation in general, access to capital to expand the shareholder-base or, again, difficulties in obtaining cooperation between firms or forming groups as associations or voluntary chains, as well as, in certain cases, changes in local competition when an increase in demand produces an increase in the number and range of firms involved in tourism, as in the case of rural tourism.

The difficulties which may hamper the tourist industry in adjusting to the increased demand explain why a number of measures have been implemented aimed at creating favourable conditions for businesses in the tourist industry, providing for, in particular, increased information - including statistical information - on the tourist industry, and changes in the legal situation regarding enterprises, bearing in mind the completion of the internal market.

⁹

e.g. in the hotel and restaurant industry, half of the estimated 1.3 million enterprises in the European Union in 1990 were made up solely of the head of the enterprise, 80% of the hotel beds available were provided by independent hotels, and micro-enterprises (0-9 employees) made up 96% of the enterprises in the accommodation and catering sector. These enterprises accounted for 57% of turnover in the sector and 63% of the estimated total labour force of 4.6 million persons. EC DG XXIII-Eurostat, Enterprises in Europe, 3rd report, 1994.

3. *Employment in tourism*

3.1 *A significant contribution*

Approximately 9 million persons are estimated to work in the tourist industry in the Community, accounting for almost 6% of total employment in terms of jobs directly linked to tourism products and activities. In addition, the recent work of the Organization for Economic Cooperation and Development (OECD)¹⁰ seems to confirm the tourist industry's potential for contributing directly to reducing unemployment and creating new jobs via the generation of tourist flows and income.

Tourism is therefore one of the ways forward to the 21st century, in line with the Commission's thinking set out in its White Paper on Growth, Competitiveness and Employment of December 1993, on which the recent European Councils have called for the rapid implementation of an action plan. Tourism is therefore one of the seventeen major fields where the prospects for expanding employment in the medium term have been perceived positively in the light of changes in habits, living standards and the technologies which can be used.¹¹

At the European Council in Essen, the Commission presented the results of this field survey, which analysed the nature of the many innovative local initiatives to create jobs, as well as the obstacles encountered and the conditions which ensured success. The common guidelines which emerge for the development of the local initiatives regard tourism and its players as protagonists in the desired changes towards a "society of initiatives"¹² based on the cohesion of the social fabric and on the network of associated cooperation projects. The establishment, as called for by the Corfu and Essen European Councils, of a framework of more coherent actions in favour of local employment, together with the development initiatives, can also contribute towards exploiting the potential for creating new jobs in tourism.

3.2 *Employment in the tourist industry is linked to the specific nature of the work and the organization of the tourist industry*

Because of the nature of the tourist industry, which is based mainly on supplying services in discontinuous periods of time alternating with activity in the other economic sectors, working and employment conditions are very specific. They involve, for example, seasonal work, weekend working and long working days, with all these factors having repercussions on each other. In particular, the seasonal nature of the work, which means that employment is precarious and a factor in the instability of incomes, tends to produce a distribution of work throughout the year which is different from the usual pattern in the economy.

These specific characteristics, together with the predominance of SMEs in the sector, no doubt explain, and in some cases are the reason for, the disproportionate employment of particular categories of labour in the tourist industry, i.e. between 45 and 65% of staff are females, there are many young people and many staff with few or no qualifications.

These features have certain consequences. The rapid turnover or - from the employee's point of view - precariousness of employment can prevent people from acquiring skills and qualifications in certain branches of the tourist industry, at the very time when the increasing accent on quality requires more professional standards in the industry, and it can even lead to shortages of labour which hinder the expansion of employment and tourism.

¹⁰ According to the analyses presented at the seminar organized by the OECD Tourism Committee on "Tourism and employment", (Antalya, 24-26 April 1994), the effect on employment of the growth in tourism consumption is more rapid than in the other sectors of the economy; see also the estimates by the WTTC published in "Travel and Tourism - Special Report on Employment", Brussels, 1993.

¹¹ Commission working document on "new sources of employment" due for publication.

¹² European Commission, Implementation of the White Paper on Growth, Competitiveness, Employment - Report V, "Innovations in Job Creation, Results and Prospects for Local Action".

According to experts in the field, the common factor governing the main features of employment in this sector is that the tourist industry is seasonal. This means that workers recruited into the tourist industry, like those in most seasonal activities, have few qualifications and receive only little training for acquiring qualifications, because of lack of time and of motivation. It is clear that these aspects are a key factor in managing businesses, in the brand image of this sector of activity and in strengthening its position in the face of competition from other regions of the world.

On the other hand, the fact that employment in the tourist industry is so seasonal calls for a major study on employment - and, more generally, on the social aspects - since this sector can be used as a test ground for trying out projects based on spreading the working hours of seasonal or casual workers throughout the year. This would mean a fundamental rethinking of the breakdown of working periods, inactivity (or unemployment) and training for substantial proportions of the active population in Europe. Such a study naturally requires the participation of the social partners, in particular at Community level.

II. THE COMMUNITY'S RESPONSE

1. *The instruments available*

On a general level, the Community has a variety of legislative instruments to accomplish its task, some with mandatory effect (regulations, directives, decisions), others non-binding (recommendations, communications, opinions). They may be more of an operational nature (e.g. action plans and work programmes laying down the priorities for measures) or strictly regulatory (laying down the rights and obligations of the parties involved). These acts may therefore be exhortative (proposing lines of action which the Community would like to see followed on a voluntary basis) or combine all these elements. In the framework of broader international cooperation, the Community may also accede to, negotiate or promote conventions and other agreements on specific topics involving other international organisations or third countries. Finally, for the implementation of certain tasks for which neither partnership nor collaboration with the private sector or the economic and social operators, nor even administrative decentralisation, has offered satisfactory solutions, the Community has decided to establish decentralised Community bodies in the case of a clearly defined field which do not encroach on the powers of the institutions for the Community policy concerned.

2. *Using these instruments to benefit tourism*

This panoply of instruments has already been used to develop Community measures to assist tourism, as the annual report on Community measures to assist tourism clearly demonstrated¹³.

Direct measures

An initial Community action plan to assist tourism (Decision 92/421/EEC of 13 July 1992 on the basis of Article 235 of the Treaty)¹⁴ was implemented for a duration of three years as of 1 January 1993. The priorities set out in the Annex to the action plan have made it possible to carry out a series of pilot projects, particularly in the fields of rural, cultural and social tourism, vocational training and the environment. These projects have also provided opportunities for operators in the field of tourism in the different countries and regions of

¹³ COM 94(74) final of 6 April 1994.

¹⁴ OJ No L 231 of 13.8.92.

Europe to work in partnership. The implementation of this action plan will be independently evaluated.

Actions have also been carried out since 1990 under the two-year programme for developing Community tourism statistics¹⁵ under Article 213 of the Treaty.

Actions forming part of the action plan implemented under Council Decision 92/241/EEC of 13.7.92

1. *Improving knowledge of the tourist industry and ensuring greater consistency of Community measures*
2. *Staggering of holidays*
3. *Transnational measures*
4. *Tourists as consumers*
5. *Cultural tourism*
6. *Tourism and the environment*
7. *Rural tourism*
8. *Social tourism*
9. *Youth tourism*
10. *Training*
11. *Promotion in third countries*

Indirect measures

At the forefront of these measures come the 5th Community action programme in the field of the environment¹⁶ and the *Directives* on the environment, particularly those concerning the assessment of the environmental impact of projects, the quality of the natural environment and nature conservation, which meet the objectives of the policy on the environment set out in Article 130r. Also in this capacity, the Community is a contracting party to *International Conventions* aimed at regions particularly affected by tourism, such as the Barcelona Convention on the protection of the Mediterranean and the Convention on the protection of the Alps.

The actions carried out for the promotion of culture, as laid down in Article 128 of the Treaty, mainly deal with the protection of cultural heritage of European significance, particularly within the context of the "RAPHAEL" Community action programme¹⁷.

Enterprises involved in tourism have also been able to benefit from all the measures provided for under Decision 93/379/EEC of 14 June 1993¹⁸ on a multinational programme of Community measures to intensify the priority areas and ensure the continuity and consolidation of policy for enterprise, in particular small- and medium-sized enterprises, in the Community.

In the field of research and development and on the basis of the principles set out in Articles 130f and 130g, a Tourism Information Marketing project has been implemented under the third RTD framework programme, and several pilot and demonstration projects for electronic tourism information services have been carried out under the IMPACT programme; as part of this same programme, a field for specific research has been opened up on "technologies for protecting and restoring the cultural heritage in Europe". Under the 4th RTD framework programme¹⁹, the programme on the environment and climate, and in particular Topic 4

¹⁵ Council Decision 90/665/EEC of 17 December 1990, OJ No L 358 of 21.12.90.

¹⁶ See the 1st interim review, COM(94) 453 of 30.12.1994.

¹⁷ COM(95) 110 of 29.3.1995.

¹⁸ OJ No L 161 of 2.7.93.

¹⁹ COM(94) 68.

concerning the human dimension of environmental change, the aim of which is to improve the political basis and measures to support sustainable development in Europe, may make it possible to carry out projects of interest to tourism.

The implementation of measures for the establishment of the internal market will create a favourable environment for the growth of trade likely to promote intra-Community tourism and encourage the emergence of a single tourist destination for tourists from outside the Community. An example of this is the removal of customs checks and formalities at the Community's internal frontiers. Certain measures related to the abolition of checks at internal frontiers, as provided for by Article 7a of the Treaty, now apply in some Member States, thanks to the entry into force of the Implementing Convention for the Schengen agreements²⁰.

Other measures have still to be adopted by the Member States, such as the agreement on the crossing of the external frontiers of the Member States by nationals of third countries. At the same time, the progress made towards the completion of the internal market regarding the free movement of workers, the right of establishment, freedom to provide services and the abolition of tax frontiers, which simplifies movement within the Community and the cross-border establishment of tourist businesses, gives substance to the idea of a transnational tourist industry. Such a situation, given the size of the market, is likely to increase the dynamism of the European tourist industry. Various *Regulations* have thus been adopted to simplify the crossing of borders, such as Regulations 3925/91 and 1832/92 on controls and formalities applicable to baggage. Similarly, *Directives* such as those on fiscal matters (Directives 91/680/EEC or 92/12/EEC) aim to simplify purchases by tourists outside their place of residence, including tax-free sales.

Another example of the stimulating effect of Community provisions on the growth and competitiveness of tourism is that of the completion of the internal market in transport services²¹. Moreover, the White Paper on the future development of the common transport policy²², which stresses the establishment of a Community framework which will ensure sustainable mobility, sets out a global approach which takes account of an improvement in and more rational use of infrastructures, increased safety for users and improved environmental protection.

Tourism may also be particularly interested in the actions launched by the Community to help establish and develop trans-European networks in the areas of transport, telecommunications and energy infrastructures, as laid down in Article 129b of the Treaty.

In applying the rules governing competition, the Commission also takes care to ensure that certain anti-competitive practices engaged in by undertakings or Member States, and which might adversely affect conditions on the tourism market and thus delay or prevent its balanced development, are punished.

However, certain agreements or aid measures may be permitted when, for instance, they allow structural changes in the tourist industry to be speeded up or contribute to the development of less-developed regions. In the field of tourism, therefore, competition policy is contributing to the achievement of a frontier-free area and to economic and social cohesion, by opening up markets protected by cartels, abuses of dominant positions or state aid.

Further to this, the second Commission three-year action plan for consumer protection²³,

²⁰ On 22 December 1994, the Schengen Executive Committee decided upon the irreversible application of the Convention as of 26 March 1995 for 7 of the 9 signatory countries (B, D, E, F, L, NL and P). Italy and Greece have not yet fulfilled all the preconditions.

²¹ See the Commission report on Community Actions affecting Tourism (COM (94)74 final of 6 April 1994) for further details of internal market provisions that have an impact on the development of tourism.

²² The Future Development of the Common Transport Policy (COM(92) 494 of 2.12.1992).

²³ COM(93) 378 of 28 July 1993.

which was drawn up in accordance with Article 129a, opened the way to work on distance selling and consumer access to justice, and the adoption of *Directives* on time-sharing (94/47/EEC) and unfair clauses in contracts (93/13/EEC). Other actions taken in this field of the protection of tourists as consumers include the adoption of Council *Recommendations* 86/665/EEC and 86/666/EEC on standardized information and fire safety in existing hotels respectively, and a *Directive* on package travel (90/314/EEC).

The structural funds make a major contribution to the development of tourism in the Community and seek to achieve the objectives of economic and social cohesion as defined under Article 130a. Aid is concentrated on the underdeveloped regions (Objective 1), those affected by the decline of industry (Objective 2) and those concerned by rural development (Objective 5b). These regions are defined as priority regions for the application of the structural funds (EAGGF-Guidance, ERDF and ESF). Tourism is included amongst the measures under the priority areas for development under Community support frameworks, the operational programmes and the unique programming documents. Actions are also taken under certain Community initiatives (such as LEADER, INTERREG, REGIS, etc.) to assist regional development within the Union. Opportunities for tourism to implement joint measures, set up networks and try out new action in favour of exchanges of experience, particularly in the field of supporting *local initiatives*, are also planned under the Community's ENVIREG, RECITE, PACTE and OUVERTURE programmes. During the period 1989-1993, the tourist industry received between 2% and 20% - depending on the regions and objectives concerned - of the Community aid available from the Structural Funds²⁴, i.e. a total of more than ECU 3 thousand million for *co-financing investment and infrastructure projects for tourism* and also *projects to upgrade cultural and historical resources* in the less developed regions, improve the supply of tourist amenities and generate new activities in areas of industrial decline, and to provide infrastructures for the reception of tourists, protecting the environment, diversifying activities and promoting tourism in rural areas, particularly to supplement farmers' incomes.

- Important measures have also been carried out in the field of education and vocational training, either via the European Social Fund (Articles 123 and 125) or through the various programmes drawn up in response to the objectives defined in Articles 126 and 127. Decisions setting up the FORCE ongoing training programme and the PETRA initial training programme introduced a tourism component to human resources, and the transnational exchange programmes and pilot projects of the recently-adopted LEONARDO programme should help to extend the measures already undertaken at Community level in the field of training.

B. COMMUNITY ADDED VALUE IN THE FIELD OF TOURISM

As emphasised above, a broad range of Community measures may be implemented to assist tourism. By taking such measures at Community level, value is added to the measures carried out by national, local and professional bodies or those ensuring the representation of the various interests of the tourist industry, thus enabling tourist activities to contribute to the achievement of many Union objectives.

I. A RESPONSE TO THE OBJECTIVES SET OUT IN THE TREATY ON EUROPEAN UNION

It may be useful to recall that in the first paragraph of Article b of the Common Provisions the Union sets itself the objective

²⁴ For a more detailed presentation, see the Commission's report on Community actions affecting tourism (COM(94) 74 final of 6 April 1994) and in the summary table in Annex 4.

- to promote economic and social progress which is balanced and sustainable, in particular through the creation of an area without internal frontiers, through the strengthening of economic and social cohesion and through the establishment of economic and monetary union, ultimately including a single currency in accordance with the provisions of this Treaty.

It is on the basis of this objective that the Treaty establishing the European Community defines the Community's task. Establishing a common market and an economic and monetary union and implementing the common policies or activities referred to in Articles 3 and 3a are, according to Article 2 of the above treaty, intended to "promote throughout the Community a harmonious and balanced development of economic activities, sustainable and non-inflationary growth respecting the environment, a high degree of convergence of economic performance, a high level of employment and of social protection, the raising of the standard of living and quality of life, and economic and social cohesion and solidarity among Member States."

The extension of the Community's responsibilities to tourism in Article 3t thus makes explicit the measures already carried out to assist tourism under the various Community policies for attaining the objectives of the Treaty.

If overall circumstances are changing as a result of the international economic situation and changes in demand, as a number of experts suggest, the attention paid to tourism in Community policy-making assumes greater importance. The measures already taken by the Community, particularly those connected with the various policies it implements under the Treaty, have been implemented taking full account of existing national measures. The Member States are taking steps to stimulate tourism either directly or in conjunction with other administrative and political authorities at regional or local level. A broad range of measures is involved, reflecting each country's development and the type of potential tourist attractions. Such measures have also changed over the years, thus reflecting the volatile nature of tourism and the way supply can adapt considerably to meet demand²⁵.

II. TOURISM CONTRIBUTES TO REINFORCING ECONOMIC AND SOCIAL COHESION IN THE UNION

Articles 130a and 130b clearly state the direction of the Community's actions to reinforce economic and social cohesion, by reducing the differences between levels of development in the various regions and the lack of progress in the least-developed regions, including rural areas, by implementing Community policies and schemes, by completing the internal market and, above all, by using funds intended for structural purposes (the ERDF, ESF and EAGGF), as well as the European Investment Bank and other existing financial instruments.²⁶

Tourism can assist in bringing about a better distribution of activities and jobs in the Union, thus contributing to the desirable aim of redressing the imbalance between the regions in the Community. Accordingly, in recent years there has been a convergence of objectives with a tendency to diversify the supply side of tourism and the aim of cohesion in the Community, which has appeared in the form of support, particularly financial support, for expanding tourism in less-developed regions or those eligible for structural funds as objectives 2 and 5b.

By diversifying tourism on the supply side, either to respond to the increased demand or to attract new categories of customers, it has been possible to enlarge its range of services to cover activities described as cultural or rural tourism, or make its services more specialized by

²⁵ See Annex 3, Summary sheets, by country of the European Economic Area, on the principal bodies in charge of tourism policy at national level.

²⁶ European Parliament, the role of the EC in regard to tourism and regional development, Directorate-General for Research, Working Paper, Luxembourg, October 1993.

offering other services additional to lodging, such as cooperation between tourist areas around a theme (the route to Compostella - a Council of Europe project which is receiving financial support from the Union - wine routes etc.). The result has been to make tourism an alternative source, or even a prime source, of economic activity in run-down areas, often resulting from the geographical delimitation of the area covered by structural funds.

However, precisely because of the organization of Community aid as structural funds, questions have been raised as to how long the tourist industry can be called on as a driving force for developing some local areas, and particularly as to the compatibility of this development with preserving the cultural and environmental diversity of the Community.²⁷ In the case of rural tourism in particular, the Committee of the Regions, while regarding the development of such tourism as essential, is in favour of encouraging a new overall approach, with a view to ensuring a "logical, integrated and heritage-conscious exploitation of the tourist assets which can open up new horizons for many of our rural areas"²⁸.

Tourism affects the development of the whole of Europe, and at the same time depends on this development. A sustainable tourism policy could also form part of a plan for developing Europe, which the European Ministers for Town and Country Planning have agreed would be drawn up jointly by the Member States and the Commission, in particular on the basis of the documents presented at the meeting in Leipzig on 21 and 22 September 1994²⁹. A plan of this kind would be based on three elements, i.e. a system of urban centres, a network of environmentally acceptable efficient infrastructures, and a European network of open spaces of ecological importance and natural beauty.

III. TOURISM IS AN IMPORTANT AREA FOR IMPLEMENTING SUSTAINABLE DEVELOPMENT

The future of European tourist activity fits perfectly into the pursuit of the objective laid down in Article 2 of the Treaty on European Union, i.e. to promote "a harmonious and balanced development of economic activities, sustainable and non-inflationary growth respecting the environment". It is also basic to the considerations in the Commission's White Paper³⁰ on a new development model for the Community, of which one of the keystones would be "to make the economic-ecological relationship a positive instead of a negative one", in particular by reorienting "existing policy instruments in so far as they encourage the inefficient use of resources in the Community. Such a review should end up in a set of clear signals and incentives to all economic agents and decision-makers".

The tourist industry can now start to incorporate this sustainable development approach, since there are few activities where success is so clearly dependent on the need to make different policies converge in order to overcome the complexity of the tourist industry, which is a combination of an economic activity most often engaged in under a private set of rules and

²⁷ Cf. in particular the European Parliament Resolution of 13 July, 1990 [OJ C 231], and particularly recital I "regretting that, in many cases, tourist development has taken place to the detriment of the environment, without any form of planning, as if it were a renewable consumer resource" and point 6, which "calls on the Commission to make funds available for tourism projects from the ERDF and other EEC funds only where such projects are clearly not harmful to the environment within the meaning of the Directive on Environmental Impact Assessment....".

²⁸ Opinion of the Committee of the Regions on "A policy for the development of rural tourism in the regions of the EU" (CR 19/95 of 2.2.1995).

²⁹ Europe 2000+: Cooperation for European territorial development (COM(94) 354 of 27 July 1994); Principles for a European Spatial Development Policy, Committee on Spatial Development (CSD), 4 October 1994. This document specifies that one of the main aims of a plan for developing the Community's territory is to contribute to the implementation of Community policies which affect the environment, so as to respond to the main objective, which is sustainable and balanced development, defined as a process of economic and social change which uses resources for the immediate and future benefit of the people. This means that sustainable development implies changes in production and consumption planning, as well as in technology, to improve productivity and make more efficient use of raw materials, since in the long term economic development depends on the quality of the environment.

³⁰ Growth, competitiveness, employment - the challenges and ways forward into the 21st century - Commission's White Paper, Chapter 10.

reliant on the availability of public goods (landscapes, cultural heritage, leisure facilities, transport infrastructure etc.). The economic dynamics of the sector, tourist-satisfaction and preservation of our natural and cultural heritage cannot be separated. There are many examples to illustrate the fact that an environment which has been spoiled - whether because of the quality of the water or of the countryside, for example - is less attractive to tourists. On the other hand, when the natural and cultural heritage has been preserved intact and is well presented, this gives a considerable advantage, which is always emphasized in tourist advertising.

The need to make different policies converge on the same objective also means that tourism is a field of action ready-made for implementing sustainable development. In addition, the foreseeable growth of tourism and the pressures which it exerts, allied to an increased demand for quality on the part of tourists, means that such an approach can no longer be delayed. This is illustrated particularly by the debates on the spread of property investment, which increases the accommodation available, especially in the form of secondary residences or part-time use of such property. Article 130r(2) of the Treaty lays down one of the essential methods of attaining this aim, i.e. that environmental protection requirements must be integrated into the definition and implementation of other Union policies. Integration is the keynote of the Fifth Community Action Programme on the Environment. In particular, it permeates the activities of the Commission, which has drawn up a series of internal regulations to ensure that the environment is taken into account at the earliest possible stage when legal or other measures are being drawn up. At the meeting in Santorini on 13 and 14 May 1994, the EU Ministers for the Environment recognized the urgency of adopting this integrated approach to tourism, emphasized that further efforts must be made to apply Community legislation fully and to reduce the effect on the environment of tourism-linked activities, and agreed to take the necessary steps in this respect. This concern is shared by the Council of Europe, which has organised various events on the topic of environmental protection, with particular regard to tourism.

Accordingly, tourism in the Union could from now on be planned and implemented on principles of sustainable development. This could guarantee that the activity continues on a regular basis, ensure that tourists are satisfied and contribute to maintaining Europe's natural and cultural heritage. In addition, this approach, which is essential and urgent for the tourist sector, could serve as an example for other activities, the future of which depends to an equal extent, but in a perhaps less directly perceptible way, on ensuring sustainable development.

The Community could fulfil its role through the implementation of experimental measures to stimulate the development of tourism with the threefold objective of improving the tourist's well-being, conserving and enhancing the value of heritage and stimulating the growth and competitiveness of businesses.

The Community is, of course, perfectly aware of the fact that it is primarily the responsibility of private businesses to implement the appropriate strategies to adapt to changes in demand, which will involve paying greater attention to the qualitative aspects of tourism (tourist satisfaction and heritage), once they have been helped to understand what is at stake. However, the Community can play an important role in implementing an approach comprising responses to the complementary aspects of tourism development. For instance, it is in a position to take special initiatives to meet the need to internalise, for tourist products, the external costs resulting from the use of public property as a factor of production by the tourist industry. Often the use businesses make of the public property necessary for their activity (e.g. natural beauty spots, cultural heritage, etc.) is not treated in the same way as an investment whose continued existence and development have to be ensured, but as an inalterable free gift (according to the classic economic definition). In many cases, this results in differences in the evaluation of the use of such public property, which may damage the long-term development of tourism, depending on whether priority is given to business interests, those of the tourist or those of the environmentalist.

The great heterogeneity of tourism and the small size of most businesses mean that in some areas there is no single perception of a common interest. As a result, the response to the overall challenges of growth cannot depend on each individual response of those involved. Consequently, the Community, possibly in conjunction with national policies to offset market weaknesses by stimulating tourism, can also provide value added by taking action to help develop tourism, i.e. via the creation or development of infrastructures³¹, the upgrading of manpower³², the conservation and proper use of the environment³³ and the testing and dissemination of new or diversified tourist products.³⁴

Support for the testing of new tourism products, such as those relating to rural or cultural tourism, responds to the need to improve the overall competitiveness of the tourist economy and to increase employment in the sector. It is also based on the fact that the diversification of supply may be a way of relieving existing tension in the sector. By extending tourism beyond its traditional spheres and periods of concentration (e.g. coastal areas, mountains, summer, winter, etc.) the public authorities are trying to reduce pressure on the environment and to stimulate ways of increasing the tourist's satisfaction, in accordance with the development of demand for high-quality, more personalised services. Support for the testing of new tourism products therefore meets three requirements, that of businesses for a diversification of supply likely to increase the industry's competitiveness as a whole, that of tourists and that of the public authorities attempting to improve the quality of supply by improving the seasonal and geographical distribution of tourism.

As in other areas, the Community could be in a position to provide the tourist industry and the Member States with the opportunity to exchange experiences and compare best practices and to set up specific, complementary support mechanisms under existing or new Community instruments.

IV. TOURISM CONTRIBUTES TO PROMOTING THE EUROPEAN IDENTITY

A major innovation in the Treaty of 7 February 1992 was to establish, in its second part, citizenship of the Union (Article 8) for every person holding the nationality of one of the Member States. The exercise of this citizenship is defined by a certain number of rights³⁵, one of the foremost being that of moving and travelling freely within the territory of the Member States of the Union (Article 8a).

In the case of the majority of European citizens, this right of abode and freedom of movement will be exercised in the context of tourism, even if exchanges for employment purposes expand with the completion of the internal market and the establishment of a Union without frontiers.

³¹ One of the mainstays of national policies to assist tourism is the provision of *basic infrastructures* as a precondition for private investment in the sector: e.g. communication infrastructures, facilities and energy (e.g. roads, airports, sewage works, recreational development of lakes and reservoirs, ski resorts, etc.). This stage of "State-constructor" is already complete in its initial form in most Member States and the focus is now on *regional development* (e.g. the modernisation of existing infrastructures which have become obsolete, the restoration of damaged natural or cultural heritage and the creation of infrastructures for the protection of existing environmental and cultural heritage) and the provision of the necessary engineering for the development of activities (e.g. telecommunication infrastructures).

³² Despite the extent of training schemes at national and Community levels, the matching of supply and demand in employment in the tourist industry is still inadequate. See the project on continuing training in the tourist industry carried out under the FORCE programme, October 1994, roneo (provisional).

³³ For example, along the lines of the work on relations between tourism and the environment following the Santorini meeting.

³⁴ For instance, on the basis of the evaluation of the implementation of Decision 92/421/EEC.

³⁵ Relating to the right to vote and eligibility (Article 8b), diplomatic protection (Article 8c), right to petition the European Parliament and recourse to the ombudsman (Article 8d).

The fact remains that there is no strong sense as yet of the connection between improving conditions for movement and residence over the entire territory of the Union, even those experienced by citizens as tourists, and the establishment of Union citizenship. Greater ease in travelling does not automatically mean increased exchanges between citizens of the same political area which is under construction, i.e. the Union. It is a commonplace to read, in both economic and political analyses, that haste in creating the Union has led to physical barriers falling more quickly than the "mental" barriers, and that this gap between strictly economic patterns and behavioural patterns could, in the long term, jeopardize the very efforts to create the Union. The need to inspire citizens in order to win their assent to the values which are basic to the Union, beyond mere institutional manoeuvres, is perceived in various circles³⁶, but ways of providing this inspiration, outside the economic field, are not easy to imagine.

In the context of this search for ways of establishing the meaning of citizenship as instituted by the Treaty, tourism is an area which should be explored. When the citizen is a tourist and no longer on home ground, he is certainly conscious of the differences in culture between the Member States, and the total or partial lack of common points of reference, be they economic, environmental or cultural. However, these differences are not met with the surly look, or even flat rejection, which they might encounter in other situations, involving work or trade, for example. The strangeness which can be perceived in the use of a different language or in other ways of thinking, in other customs or even other interests, is not, in a tourism context, always a brake on exchanging ideas, but - on the contrary - may arouse a desire or wish to find out about these strange things and understand them.

In this way, tourism can be a means of reducing the differences between the multifarious realities which constitute the Union, and by a continuous process of these differences being perceived in a non-confrontational context, can facilitate communication among citizens, and thus improve the basis on which exchanges, both cultural and economic, are made between the Member States.

This line of thinking, which has been mentioned in particular in several Resolutions of the European Parliament³⁷, deserves attention since it emphasizes a third party in the sector, i.e. the tourist, who is not only a beneficiary of the products of the tourist industry and a user of tourist areas and heritages, but also a factor in the political and economic construction of the Union.

V. CONTRIBUTING TO THE MANAGEMENT OF STRUCTURAL AND TECHNOLOGICAL CHANGES AND THE DEVELOPMENT OF SMEs IN THE TOURIST INDUSTRY

Most sectors of the tourist industry, like certain other fields of activity, are highly fragmentary, which makes it difficult for everyone involved to grasp the full extent of the structural changes under way. This applies equally to changes in demand, particularly the need for increased attention to satisfying and protecting the tourist, to changes in supply conditions resulting from technological innovation or international competition, and to the growing importance of environmental and cultural aspects for the future of tourism. However, an understanding of these matters is essential if the opportunities and risks embodied in these structural changes are to be assessed and the adaptation strategies for all players defined.

In addition, the application of the many possibilities offered by advanced telecommunications systems and information technology may be a decisive factor in the development of tourism,

³⁶ Cf. in particular D. Wolton, "La dernière Utopie, naissance de l'Europe démocratique", Flammarion, Paris 1993.

³⁷ In particular the draft Resolution mentioned (EP 209.897 fin. of 23 November 1994) and the emphasis on encouraging young people to travel in the amendments proposed by the European Parliament to the tourism budget (EP 184.353 of 27 October 1994)

both to best satisfy tourist requirements and to protect heritage. The work already carried out by the Community in this area and the measures implemented or promoted in the future for the development of the information society in Europe can, to the benefit of tourism, open the markets further, improve the management of tourist businesses and the quality of the services they provide, and make European tourism products more competitive and better known³⁸.

With a view to promoting the anticipation of change, the Community can provide the whole tourist industry, especially businesses, including SMEs, with information on tourist flows, in the form of statistics or studies, and data enabling the identification of tourist and business needs alike, thus mobilising the tourist industry at European level to face the challenge of international competition. The Member States' own statistics and studies will gain value when they are incorporated in a Community framework in which national data can be compared and a fuller picture can be formed of tourism and any shortcomings at Union level. This Community approach also helps improve the results of statistics and studies produced nationally or regionally by coordinating the efforts made in this area at all levels.³⁹

The Community could also help businesses adapt to structural and technological change by promoting the creation of a legislative and administrative environment likely to promote the development of tourist demand or stimulate adaptation to changes in supply. The creation of a favourable environment must include not only the traditional approach based on simplifying the conditions for exercising business activities (e.g. by means of deregulation or exemptions) but also the implementation of a combination of special provisions on tourist activity, environmental protection, tourist facilities and tourist protection.

The Community could create a favourable environment by taking initiatives based on its own exclusive competences, as it did in the provisions referred to above concerning the creation of the internal market, the adoption of economic policy measures (e.g. on monetary matters), consumer protection, qualification needs and respect and proper attention for the environment⁴⁰. In this context it could also act through concerted approaches with the Member States, or under international conventions of direct or indirect relevance to tourism.

According to the Economic and Social Committee, the development of the framework conditions resulting from the internal market and the creation of an economic and monetary union would not be sufficient to fully exploit all opportunities that the tourism sector has while at the same time assuring balanced development without a European tourism policy.⁴¹

VI CREATING ADDED VALUE BY A COHERENT APPROACH TO POLICIES AND INSTRUMENTS

As has already been stressed above, a successful response to the challenges facing tourism must be able to put down roots in the economy of the 21st century and must be able to meet the combination of objectives likely to lead to a balanced and sustainable growth of activities.

³⁸ "Europe's way to the information society. An action plan." COM(94) 347 final of 19 July 1994; conclusions of the G7 summit on the information society, at its meeting in Brussels on 25 and 26 February 1995.

³⁹ To this end, an initial step has been taken with Council Decision (OJ L 358 of 21.12.1990) on a two-year work programme. This programme concerned a series of measures, amongst them an analysis of user needs, the establishment of definitions and methods, and the compilation and dissemination of the information already available. Subsequent to the conclusions of the implementation of this Decision, the Commission, in collaboration with the Member States, drafted and submitted to the Council a proposal for a Directive (COM(94) 582 final of 4.1.1995) concerning the adaptation and development of tourism statistics at European level on the basis of a system considered necessary by users. Essentially, this system involves an analysis of supply and its utilisation and an analysis of demand. At the same time, a proposal for a recommendation on statistical standards and the definitions and methods for compilation is under preparation.

⁴⁰ See the report on Community action to assist tourism, quoted above.

⁴¹ ESC. Initiative opinion on Tourism, adopted 15.9.94 (ESC 1021/94)

It is possible, in the light of the work already carried out by the Community, the guidelines set out by the European Parliament, the Economic and Social Committee and the Committee of the Regions and the policies implemented at national level, to identify three main lines of action:

- supporting improvement in the quality of tourism by taking greater account of trends in tourism demand;
- encouraging diversification of tourist activities and products by improving the competitiveness and profitability of the tourism industry;
- incorporating the concept of sustainable and balanced growth into tourism by taking greater account of the cultural and environmental dimensions of tourism.

Real awareness of the equal value of the three dimensions of tourism and of the need to offer combined responses requires the active involvement of all the players concerned: tourism enterprises, the citizen as a tourist and administrations and other bodies responsible for managing public assets. However, it is hard to see how such involvement can be provoked or stimulated if Community action does not have a high profile.

As demonstrated above, the Community does to a certain extent have the means of implementing programmes and actions in response to each of the priorities, albeit without reconciling the (at best latent) conflicts which remain between the dimensions of growth, tourist satisfaction and heritage protection. Each of these three poles (enterprise growth, tourist satisfaction and the protection and renewal of heritage) now has equal standing with regard to an overall policy, even if at various stages in economic development one or other of them may have been given priority. This overlap between private (tourist supply) and public (heritage and tourist protection) interests means that in some cases conflicts have to be prevented and the seemingly divergent interests of groups involved with tourism reconciled (for example consumer protection with growth of supply, or respect for the natural and cultural environment with creation of activities and jobs, etc).

Clearly, a number of policies and measures implemented by the Member States or the Community already contribute, at different levels, to satisfying certain of the interests represented in tourism. However, more often than not, this happens in a fragmented fashion, and this can be an obstacle to the balanced and sustainable growth of tourism. All the Member States have grown aware of the need for dialogue between often diametrically opposed interests, and more recently, have recognised the need to satisfy all three objectives (growth of supply, tourist satisfaction and respect for heritage). However, Member States' responses to the complexity of the interests at stake in tourism seem to vary, depending on whether the country is principally a sender/generator or receiver/beneficiary of tourist flows. Taking the Union as a whole, this is often characterized by a North/South tourism dichotomy.

Studies conducted in each of the Member States, as well as the priorities they ascribe to their respective policies, would seem to indicate that there is currently a divergence of approach between the sender countries (mainly in the North) and the receiver countries (mainly in the South). The former appear to give priority to the environmental problems linked to tourism, to respect of cultural and natural heritage and to the quality of tourism services, i.e. to demand requirements, while the latter - as a result of partially captive demand - appear to focus on the quantitative growth of private tourism services, sometimes at the expense of the public elements of supply (heritage, culture, protection of the tourist). Conflicting priorities frequently exist within each tourist area, so that the Community could serve as a point of reference for the reconciliation of such opposing viewpoints. Given the cross-border nature of tourism in terms of both tourist areas and tourist flows, it may be desirable for the development of tourism in each of the Member States to facilitate a coordinating role; such a role could be exercised more efficiently at Community level, in compliance with the principles laid down in Article 3B of the Treaty.

In the field of tourism, more than in certain other areas, the Community could take practical steps to try out coordination methods. First of all, horizontally - since each of the three dimensions acting on the growth of tourism is, and in certain cases has long been, the focus for a specific Community policy - but also vertically, since several levels (local, regional, national, professional, etc) are involved in promoting or reacting to tourism. Effective mobilisation of the players involved could be achieved via a dual coordination of this kind.

The value added of a Union tourism policy would therefore be built on that which already exists and would move in two directions simultaneously: on the one hand it would ensure that proper consideration is given to the tourism dimension of Community policies with a possible impact on the growth of tourism and, on the other, it would focus on practical ways of combining the three poles of the tourism concept, i.e. on creating a convergence of the interests which have grown up at Community level, at best unexpressed, at worst in conflict. The acute need for coordination, growth and integrated management of the sector could, then, be met through the formulation - in agreement with the Member States and the professionals concerned - of European Union guidelines which take account of the three complementary dimensions of tourism.

VII TOURISM AND COMPLIANCE WITH THE PRINCIPLE OF SUBSIDIARITY

As developments have shown, the large number of actions taken by the Member States do not mean that the Community has no part to play in this field. Community actions are defined and implemented in compliance with Article 3b, which states that "...the Community shall take action, in accordance with the principle of subsidiarity, only if and in so far as the objectives of the proposed action cannot be sufficiently achieved by the Member States and can therefore, by reason of the scale or effects of the proposed action, be better achieved by the Community". However, the question arises here of whether the Community should or should not exercise a specific competence as regards tourism along the lines of the competences acknowledged for the main policy areas with a possible impact on tourism, which are the subject of detailed provisions in the existing Treaty (e.g. transport, the environment, consumer affairs, culture, training and, depending on how the issue evolves, spatial development).

C. POSSIBLE DEVELOPMENTS IN THE ROLE OF THE UNION AS REGARDS TOURISM

The ideas developed below are based on the Union's action to date to achieve the basic objectives assigned to it by the Treaty within the limits of the powers conferred.

I. REDUCING OR ELIMINATING SPECIFIC COMMUNITY ACTIONS?

Since the three poles around which the interests of tourism can be said to revolve are served by existing Community policies, one possible option would be to rule out from the start any specific action as regards tourism. It could, in other words, be argued that the field of tourism is sufficiently or even fully covered by individual measures which, although scattered, have proved to be reasonably effective.

Tourist satisfaction would, under this scenario, be ensured by actions in the field of consumer protection, by supporting actions aimed at diversifying the tourism product, in particular via the Structural Funds (cultural or rural tourism), or by safety-enhancement measures with respect to the use of means of transport in the Community.

The interests of the tourist industry, on the other hand, could be upheld via coherent and stable policies in the fields of taxation, infrastructure creation, competition and, more generally, by a number of provisions adopted under the Internal Market.

As regards the Structural Funds, the Union keeps a close eye on compliance with Community policies not only as regards competition rules, contract awards and equality of opportunities but also as regards the protection of the environment. It pursues a vigorous policy on natural and cultural heritage, which it aims to protect not just through its rural development, environment and cultural policies but also by ensuring that every effort is made to achieve the objective of sustainable development when measures are taken under other Community policies.

Action to develop tourism in the Community could, then, be envisaged independently of a specific coordinating exercise, simply through proper application of existing policies designed to meet broader objectives or to cater for areas other than tourism.

Given the lack of a suitable framework, a comparison of practices at the various levels (Community, national, regional and local) and an exchange of best results would obviously not be feasible under this option.

II. RETAINING THE CURRENT FRAMEWORK AND LEVEL OF INTERVENTION?

It has already been shown that a number of policies formulated under the Treaty and in compliance with the principle of subsidiarity have enabled the Community to take steps to assist tourism. It has, for example, been possible to use various instruments to the benefit of one or other of the poles of tourism development, be it by creating a favourable environment for tourist mobility, improving vocational training in the field of tourism, paying proper respect to the environment or backing experimentation with new tourism products.

However, the Community cannot draw on a specific legal basis for this action, since Article 3t), in which tourism is mentioned in the Treaty for the first time, simply expresses the desirability of extending the activities of the Community to include the spheres of energy, civil protection and tourism for the purposes of achieving the objectives of Article 2. The Community can only take specific action in these fields on the basis of Article 235.

The lack of a specific basis for tourism in the Treaty establishing the European Community did not prevent the Commission from presenting and the Council from approving, under Article 235, a Community Action Plan to assist tourism⁴², once a number of measures on which common action among the partners of the Union could be based had been identified.

The Community Action Plan of July 1992 is positive in that it provides a base for organizing cooperation between Member States and stimulating dialogue with industry and the sectors concerned. It already represents an experimental platform for comparing ideas and experience, building common projects and developing common strategies. However, this action plan is limited both in its duration and in its scope.

The active participation of all the Member States in the actions tested as part of the plan has, however, given a real indication of the advantages of transnational cooperation as a tool for tourism growth and European integration. Since effective dialogue between all the parties concerned and at the various administrative levels (regional, national and international) is seen as the backbone of an effective Community plan, the actions provided for are founded on cooperation between different operational administrative levels, without interfering with the latter's own powers of initiative, in order to provide wide-ranging opportunities for

⁴² Council Decision 92/421/EEC of 13.7.1992.

participation in Community actions to assist tourism. This is mainly a matter of facilitating the comparison of national and regional tourism initiatives with the aim of encouraging exchanges and common actions and guaranteeing greater transparency for actions carried out at different levels, in a new spirit of cooperation. This could lead, not only to the transfer of best practices but also to a more rational exploitation of existing options.

III. STRENGTHENING COMMUNITY ACTION VIA THE EXISTING TREATY?

Although implementation of the first action plan demonstrated that there is an interest in transnational cooperation as regards tourism, the plan itself was not sufficient to ensure that the full potential of tourism and related actions was harnessed to the benefit of the Union's measures.

One possible response to this insufficiency might perhaps be to strengthen existing measures with an impact on tourism (cf. above) and to increase the funding allocated to them, bearing in mind the distinct implementation procedures for each of these instruments.

The Community could, within the framework of the Treaty, increase its support for efforts to achieve greater growth and competitiveness in the tourist industry, assist in improving the safety and well-being of tourists and, finally, accord priority to encouraging the protection and proper use of the natural and cultural heritage.⁴³

It could achieve these ends by, for example, supporting the further development of trans-European networks and pushing forward the development of the information society (the consequences of which will require careful assessment), it could also do so via consumer policy, actions to encourage training and quality, regional policies, actions in the field of culture, environment policy, R&D programmes, completion of the internal market, actions to assist the further development of transport, enterprise policy (particularly with regard to SMEs and the craft sector) and specific actions to assist tourism.

The Community could also endeavour to ensure that greater account is taken of specifically tourism-related interests, for example as regards actions taken in the fields of infrastructure and major networks (including information networks), by marking off - within the procedures specific to each policy, programme or measure - a section focusing on tourism, taking as a reference the spheres set out in the current Article 3t). Strengthening the various Community actions to assist tourism could therefore be geared towards meeting sectoral or specific tourism requirements. However, higher-profile Community action might also create a multiplier effect for the value added of each of the policies, since it might encourage better coordination between the various types of policy (enterprise, consumer, regional, environment⁴⁴) and between the various levels of action (Community, national, regional, local), for example along the lines of partnership between the public and private sectors.

IV. TOWARDS A COMMUNITY TOURISM POLICY?

The question of increased Community intervention to assist tourism has been raised on a number of occasions over the past few years. The demand for such intervention itself raises the following questions.

⁴³ Retaining the existing framework would not, moreover, rule out Commission initiatives to strengthen the internal coordination of its activities in order to make them more coherent with tourism.

⁴⁴ For example, in order to cope with the difficulties of training in the field of tourism, the Community makes available to businesses in the sector instruments such as participation in specific programmes or financial support from the Social Fund without, however, ascertaining whether standard industrial training practices can be readily transposed to what is essentially a seasonal activity.

Could the Community play the part of information disseminator and act as an interface between the Union and the various parties concerned (Member States, professionals, major organisations active in the sector, consumers, third countries and international organisations), thus allowing the Member States to consult each other in liaison with the Commission and, where necessary, to coordinate their actions with a view to balancing the diverse interests at play in the field of tourism? If it could indeed play such a part, the Commission could also take any initiative it considered useful in promoting this coordination.

Should the Community have a role to play in stimulating coordination between national initiatives in order to encourage, by its example, a convergence of policies via the rational organisation of exchanges of information and transfers of best practices among Member States? Such a role could extend to the formulation and implementation of actions to supplement those of the Member States, filling in any gaps left by national policies whenever they might be damaging to European tourism as a whole.

It is also possible to envisage a Community policy, complementary to the policies of the Member States, which could be drawn upon in defining the other Community actions with a potential impact on tourism. Would a Community policy along these lines generate a demonstrable Community response able to meet the need for balanced consideration of the triad of interests underlying tourism and for the integration of these interests in a logic of sustainable development?

- the Member States
- the Council
- the European Parliament
- the Economic and Social Committee
- the Committee of the Regions
- representative organizations, the social partners and other bodies active in tourism at the European level or at Member State or regional level

are requested to give their reactions to the options put forward in this Green Paper on the role of the Union in the field of tourism

by 30 June 1995

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ANNEXES

1. Towards a definition of tourism.
2. Tourism in the European Union: Trends in 1994
3. Summary sheets, by country of the European Economic Area, on the principal bodies responsible for managing tourism policy at national level (drawn up on the basis of the information provided by each Member State as at 30 September 1994)
4. Summary table of amounts set aside for tourism within the Community support framework for the period 1989-93
5. Glossary

ANNEX I

TOWARDS A DEFINITION OF TOURISM

Defining the reference population in the sphere of tourism is a controversial operation which directly influences the recognition of the role of this activity and the weight that can be attached to it at institutional level.

Quite apart from the technical definitions used to identify the various components of tourism and to grasp its economic importance, there are two elements at the conceptual level which highlight its specific features:

- the central importance of the consumer/tourist who, when he buys and uses both market and non-market goods and services, classifies these activities as "tourist" in nature⁴⁵;
- the importance of public property, both in the production process and in tourist consumption, particularly by reason of the strong attraction which these goods themselves exercise on tourist demand.

Very few activities are as directly involved in the process of transforming and developing modern societies as tourism. More than a matter of habit or a heterogeneous set of economic activities, tourism has become, within less than a century, a determining factor in the life of millions of people. Tourism changes with the improvement in living and working conditions and is simultaneously an essential element of this improvement and a result of it. Paid holidays were one of the first demands when bargaining was introduced into labour relations, and not going on holiday - particularly for economic or health reasons - is regarded as a feature of social exclusion.

However, tourism is not regarded or experienced only as an indicator of social promotion. In the collective imagination and in practice, even in a global society with media which facilitate exchanges between different cultures and ways of life, tourism is the "medium" *par excellence* for direct encounters and discovery; it is becoming the ideal terrain for bringing people closer together.

As tourism becomes a general need at the intellectual, physical, cultural, social and professional level, new or existing economic activities emerge or adapt to serve what they regard as a new market. From the economic point of view, tourism is often regarded as a market rather than a sector because of its structural characteristics.

The heterogeneous and multi-faceted nature of this consumption include, on the one hand, those goods and services which can be classed as "typically tourist" (e.g. accommodation and the planning, organisation and sale of travel and stays) and, on the other, those which are not used exclusively by tourists but which benefit - to varying degrees - both tourists and residents (e.g. passenger transport, restaurants, vehicle hire). To this must be added an induced production which, as in other fields, supports the production of the foregoing categories (for instance, the foodstuffs industry or the construction industry for hotels and restaurants, to mention only two).

⁴⁵ In fact, unlike other economic activities, tourism is difficult to define in relation to the products and services generated or to the production process, or even in relation to its object (A. Bull, "The economics of travel and tourism", Pitman-Wiley, London, 1991). The World Tourism Organisation's (WTO) definition, adopted by the statistical Commission of the United Nations in March 1993, reflects this approach which aims to define tourism demand. According to WTO, tourism includes "those activities deployed by people during the course of their journey and their stay in the place situated outside of their usual environment, for a continuous period of less than one year, for leisure or business purposes or other reasons." (UN-WTO, Recommendations on tourism statistics "Statistical Papers", ST/ESA/STAT.SER/M/83.

At the same time, the supply side of tourism goes far beyond tourist production, since it includes the utilisation of natural, cultural and artistic resources which are often unique and linked to a precise site, and which are of the nature of public property. This indicates the role of the state as a guarantor of the optimum balance between development and safeguarding the resources for future generations, between efficiency and equity⁴⁶.

The heterogeneity of the activities deployed to satisfy tourists, the conflicts of interest which may arise between professions in the same field, and the important part played by the common good in the success of a tourist destination are all aspects of the same phenomenon.

The interconnections between tourist consumption and tourist production thus permeate society as a whole and evolve together with it over time, so that it is difficult to grasp their contours and to clearly assess the attention which can be devoted to tourism at institutional level. These difficulties, which already exist at national level, become greater when viewed in a European context, and this explains the apparent paradox between the widespread perception of the important role which tourism plays at world level and the imprecise vision of its identity - which has not helped tourism to gain its legitimate place as an industry in its own right⁴⁷.

The work undertaken in recent years by the Community, although not yet completed, has allowed significant progress to be made towards an improved understanding of the sector by stimulating cooperation between Member States and with other international organisations such as the OECD and WTO⁴⁸.

⁴⁶ Cf., on the more general problem, K. Arrow, "The trade-off between growth and equity", in "Theory for economic efficiency", MIT Press, Cambridge, 1979.

⁴⁷ Despite the complexity of the tourism offer and the production functions of the branches involved, tourism is increasingly referred to in economic analysis as an industry in its own right.

See, in particular, the analysis made by J. van der Borg, M. Manente and M. Tamma in "Dimensione dell'industria italiana dei viaggi e del turismo", Costa-Rispoli, CONFINDUSTRIA, SIPI, Rome, 1992, and R. W. McIntosh and C. R. Goeldner, "Tourism Principles, Practices, Philosophy", John Wiley & Sons, New York, 1986. Application of this concept assumes, above all, that one can grasp the economic weight of the activities relating to tourism by bringing them into a single aggregate, even though this possibility does not exist with the current structures of national accounts (cf. in particular the results of the work undertaken by the OECD and published in the "Manual on the economic accounts of tourism", OECD, Paris, 1991).

This assumption is the basis for the interest of the United Nations which, in cooperation with the WTO, is proposing the establishment of "satellite accounts" on travel and tourism, with a view to consolidating all tourism-related production (an in-depth analysis of this concept is given in J. Lappiere, "A proposal for a satellite account and information system for tourism", International Conference on Statistics on Travellers and Tourism, Ottawa, 1991).

⁴⁸ Cf. EEC COM(93)345 final of 1.9.1993.

ANNEX 2

TOURISM IN THE EU: TRENDS IN 1994

Introduction

The data currently available allow only a rough assessment of tourism trends in 1994. For most countries, the data available represent the movements of the first three quarters of 1994. In terms of overnight stays, the data available cover from 80% to 95% of total overnight stays for the year, so that it is clear that the estimates made now will not be very different from the final figures.

In the case of certain countries, the 1994 data are not available to Eurostat, and these countries are left out of the analysis below.

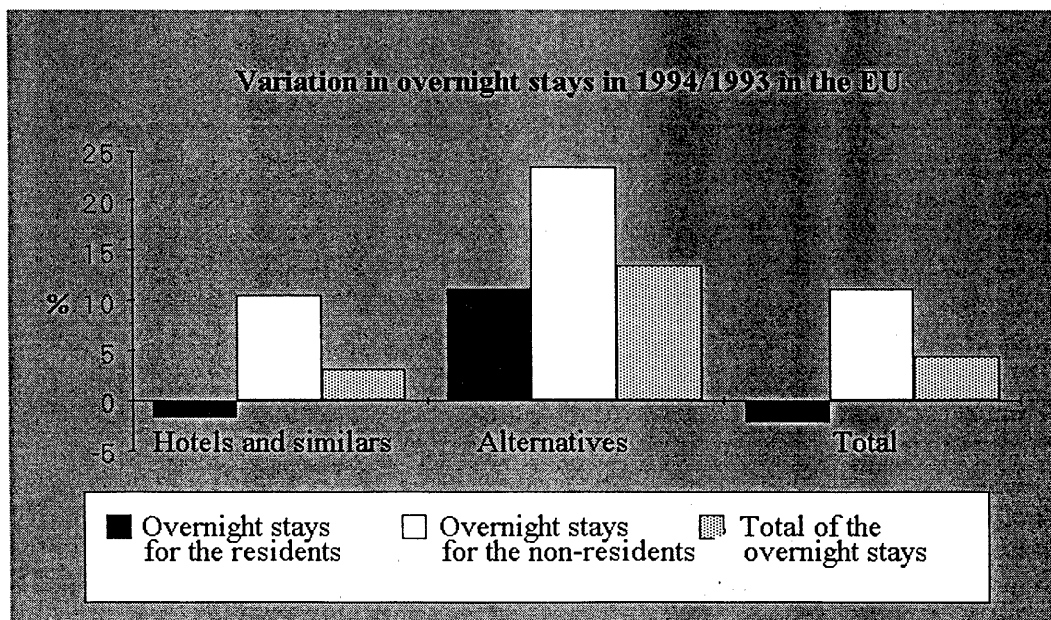
Principal conclusions

After stagnating for some three years, during which period the variations in tourist movements were non-significant for most countries of the EU, 1994 is the year in which major changes took place. For some countries these changes are extremely positive in terms of overnight stays and receipts.

Overall, the findings are as follows:

There was more international tourism, whereas tourism involving residents within a country was slightly down. In terms of overnight stays, there was an estimated 11% increase in overnight stays by non-residents, a decline of 2.3% in overnight stays by residents and a 4.4% increase in total overnight stays within the EU.

Alternative establishments are the big winners, with increases in terms of overnight stays reaching some 13% for the EU as a whole, whereas the same variation for hotels is about 3%.



In the countries of southern Europe there were unexpected increases in terms of overnight stays: 20% for Spain, 14.2% for Italy and 9.4% for Greece. If overnight stays by non-residents are examined, one finds even larger increases of 23.8%, 24.7% and 11.7%, respectively, for the same countries.

EU: Variations 1994/1993	Hotels and similar	Alternative acc.	Total
Overnight stays by residents	-1.8	11.1	-2.3
Overnight stays by non-residents	10.5	23.4	11.1
Total overnight stays	3.1	13.4	4.4

Source: Eurostat estimates

More income (4.1%) and more expenditure (2.4%) under the "travel" heading in the balance of payments in 1994.

To some extent the variations in 1994 can be explained by the economic recovery at EU level and by monetary fluctuations, which explains an increase in competitiveness within the same countries.

Trend in overnight stays

The variations in overnight stays by residents within the total for accommodation were relatively modest in 1994 compared with 1993. Only in Italy was there a major increase of 8%, whereas for some countries the figure was slightly negative.

In the case of non-residents the variations become more significant for the countries of southern Europe, while for the other countries of the EU the variations are around 0%, except for Finland, where there was an estimated increase of 12.6%.

A study of overnight stays by form of accommodation shows major increases in overnight stays by non-residents in hotels and even greater increases for alternative accommodation in terms of overnight stays by both residents and non-residents.

HOTELS	B	DK	D	GR	E	F	I	NL	P	FIN	Total
<i>Residents</i>											
Total overnight stays in 1993 (1000)	2557	5639	142130	12059	54879	90160	122270	7640	7201	7985	452519
Variation 1994/92	4.6%	6.8%	-1.5%	1.4%	3.4%	-10.7%	0.3%	4.8%	-3.8%	0.0%	-1.8%
Availability of data in 1994 (months)	10	11	10	9	12	9	9	6	8	9	
<i>Non residents</i>											
Total overnight stays in 1993 (1000)	6751	5880	26030	36475	82872	55455	64495	7973	15965	2588	304484
Variation 1994/92	1.8%	-6.5%	0.3%	11.6%	17.9%	-1.7%	16.0%	-7.1%	14.5%	15.9%	10.5%
Availability of data in 1994 (months)	9	11	10	9	12	9	9	6	8	9	
<i>Total</i>											
Total overnight stays in 1993 (1000)	9309	11519	168160	48534	137751	145614	186765	15613	23166	10572	757003
Variation 1994/92	2.6%	-4.6%	-1.2%	9.2%	12.1%	-7.2%	5.7%	-1.6%	8.7%	4.0%	3.1%
Availability of data in 1994 (months)	9	11	10	9	12	9	9	6	8	9	

ALTERNATIVE ACCOMMODATION	B	DK	D	GR	E	I	NL	P	FIN	Total
<i>Residents</i>										
Total overnight stays in 1993 (1000)	9695	8191	134252	478	13634	45912	31351	6257	1753	251521
Variation 1994/92	-1.5%	-1.0%	1.9%	14.9%	53.2%	35.9%	0.5%	-4.3%	-0.7%	11.1%
Availability of data in 1994 (months)	9	10	10	9	8	9	6	8	9	
<i>Non residents</i>										
Total overnight stays in 1993 (1000)	4930	4573	8664	633	5260	20849	9205	1866	341	56320
Variation 1994/92	-2.6%	8.6%	-3.3%	21.4%	55.3%	42.9%	7.5%	-20.7%	-8.4%	23.4%
Availability of data in 1994 (months)	9	10	10	9	8	9	6	8	9	
<i>Total</i>										
Total overnight stays in 1993 (1000)	14625	12764	142915	1110	18894	66761	40555	8123	2094	307841
Variation 1994/92	-1.9%	2.4%	1.5%	18.6%	53.8%	38.1%	2.2%	-8.2%	-2.0%	13.4%
Availability of data in 1994 (months)	9	10	10	9	8	9	6	8	9	

TOTAL ETABLISHMENTS	B	DK	D	GR	E	F ⁽¹⁾	I	NL	P	FIN	Total
<i>Residents</i>											
Total overnight stays in 1993 (1000)	12253	13830	276381	11863	68513	90160	168182	38991	13457	9737	703367
Variation 1994/92	-0.3%	-1.8%	0.1%	2.1%	0.0%	-10.7%	8.0%	1.5%	-4.1%	-0.2%	-2.3%
Availability of data in 1994 (months)	9	11	10	9	11	9	6	6	8	9	
<i>Non residents</i>											
Total overnight stays in 1993 (1000)	11681	10453	34694	37108	88132	55455	85344	17178	17831	2929	360804
Variation 1994/92	-0.2%	0.1%	-0.7%	11.7%	23.8%	-1.7%	24.7%	-0.4%	10.0%	12.6%	11.1%
Availability of data in 1994 (months)	9	11	10	9	8	9	6	6	8	9	
<i>Total</i>											
Total overnight stays in 1993 (1000)	23934	24283	311075	49617	156644	145614	253526	56169	31289	12666	1064816
Variation 1994/92	-0.2%	2.2%	0.1%	9.4%	19.9%	-7.2%	14.2%	0.9%	3.7%	2.8%	4.4%
Availability of data in 1994 (months)	9	10	10	9	8	9	6	6	8	9	

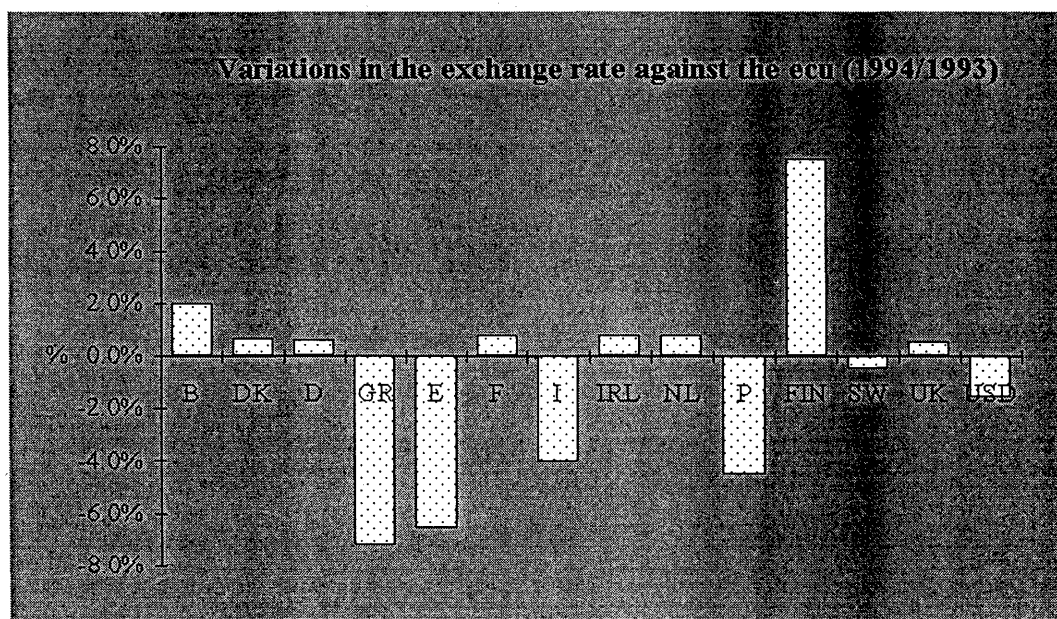
(1) Hotels only

Tourism income and expenditure in the balance of payments - Variations in exchange rates

In general, there were increases in income in all countries for which the figures are available, with the exception of Portugal (-15%) and Germany (-4.4%). Expenditure shows the same trend, except that there were remarkable falls in Spain (-17%), Italy (-17%) and Portugal (-13%). Overall the BLEU heads the table, with increases in income and expenditure of 29.3% and 20.6% respectively.

BALANCE OF PAYMENTS: BLEU DK TRAVEL (Mill. ECU)	UEBL	DK	D	GR	E	F	I	NL	P	TOTAL
INCOME	3479	2599	8974	2861	16516	19922	18840	4015	3568	80775
Variation 1994/92	29.3%	2.8%	-4.4%	10.1%	8.3%	2.1%	5.3%	0.3%	-15.0%	4.1%
Availability of data in 1994 (months)	10	9	10	10	10	10	9	9	8	
EXPENDITURE	5439	2738	32041	857	4021	10919	12006	7672	1574	93130
Variation 1994/92	20.6%	11.7%	9.2%	11.5%	-17.0%	6.8%	-17.6%	-0.4%	-13.1%	2.4%
Availability of data in 1994 (months)	10	9	10	10	10	10	9	9	8	

A study of the exchange rate variations in 1994, as compared with 1993, shows major variations which partly explain the increase in the competitiveness of the countries of southern Europe (GR, I, E, P) and the consequent increases.



Exchange rate against the ecu	B	DK	D	GR	E	F	I	IRL	NL	P	FIN	SW	UK	USD
Average value in 1993	40.47	7.59	1.94	268.57	149.12	6.63	1841.23	0.80	2.18	188.37	6.70	9.12	0.78	1.17
Average value in 1994	39.66	7.54	1.92	288.03	158.92	6.58	1915.06	0.79	2.16	196.90	6.19	9.16	0.78	1.19
Average value 1994/1993	2.0%	0.7%	0.6%	-7.2%	-6.6%	0.8%	-4.0%	0.8%	0.8%	-4.5%	7.5%	-0.5%	0.5%	-1.6%

ANNEX 3

**SUMMARY SHEETS, BY COUNTRY OF THE EUROPEAN ECONOMIC AREA
ON THE PRINCIPAL BODIES RESPONSIBLE FOR MANAGING
TOURISM POLICY AT NATIONAL LEVEL**

AUSTRIA

PUBLIC INSTITUTIONS

AT NATIONAL LEVEL

BUNDESMINISTER FÜR WIRTSCHAFTLICHE
ANGELEGENHEITEN (Minister for Economic Affairs)

BUNDESMINISTERIUM FÜR WIRTSCHAFTLICHE
ANGELEGENHEITEN (Federal Ministry for Economic Affairs)

ABTEILUNG FÜR NATIONALE TOURISMUS-
ANGELEGENHEITEN (unit for national tourism policy)

Responsible for:

- General tourism policy orientation, (transport policy, regional policy, educational policy, statistics, studies and promotion);
- The Austrian National Tourist Office and the tourist industry.

ABTEILUNG FÜR TOURISMUSFÖRDERUNG (Division for
national subsidies)

Responsible for:

- Monitoring and financial support of national tourism projects with emphasis on the development of quality.

ABTEILUNG FÜR INTERNATIONALE
TOURISMUSANGELEGENHEITEN (Division for international
tourism relations)

Responsible for:

- Representation of Austria's tourism policy abroad and representation of Austria in the EU and in other international organisations;
- Negotiation of bilateral agreements in the field of tourism and attending to their implementation.

(at national level)	<p>WIRTSCHAFTSKAMMER ÖSTERREICH, SEKTION TOURISMUS UND FREIZEITWIRTSCHAFT (Austrian Federal Economic Chamber, Section Tourism and Leisure Industry) - Body established by Public law with obligatory membership for all self-employed in industry and commerce.</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Representation of the interests of those self-employed in the tourist industry; - Initiation and evaluation of draft legislation; - Co-operation with Parliament, Government and administrative authorities; - Advisory services; - Contribution to work done by the Austrian National Tourist Office; - Vocational training; - Management consulting for enterprises in the tourism industry.
	<p>BUNDESARBEITSKAMMER (Federal Chamber of Labour)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Representation of the interests of those employed in the tourist industry; - Initiation and evaluation of draft legislation.
AT REGIONAL LEVEL	<p>LANDESREGIERUNGEN (Federal Provincial Governments)</p> <p>TOURISMUSABTEILUNG (Tourism department)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - One government official is specifically responsible for tourism; - Legislation; - Executive competencies to promote and support related projects and development measures; - Control of the implementation by the local tourist agencies.
PUBLIC/PRIVATE INSTITUTIONS	
AT NATIONAL LEVEL	<p>ÖSTERREICH WERBUNG (Austrian National Tourist Office - ANTO)</p> <p>An association between the Federal Ministry of Economic Affairs, the 9 federal provinces, and the Austrian tourist industry (represented by the Economic Chamber) to promote tourism in Austria on the domestic market and abroad.</p>

(at national level)	<p>KURATORIUM DES ÖSTERREICHISCHEN FREMDEN- VERKEHRS (Board of Trustees of Austrian Tourism)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Coordination committee of the Federal state, the Federal Provinces, and the Federal Economic Chamber. <p>BÜRGES. Bank of the Federal Ministry of Economic Affairs for the administration of support schemes for SMEs in tourism.</p>
AT REGIONAL LEVEL	<p>LANDESFREMDENVERKEHRSVERBÄNDE (regional associations) - groupings of the tourist offices of various regions</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Joint promotional and marketing activities.
AT LOCAL LEVEL	<p>LOKALE FREMDENVERKEHRSBÜROS (local tourist information offices)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Providing information on accommodation and local events; - Undertaking promotional and marketing activities on local level.
PRIVATE SECTOR	
AT NATIONAL LEVEL	<p>ÖSTERREICHISCHER KURORTE- UND HEILBÄDER- VERBAND (The Austrian Association of Health Resorts and Spas).</p>
	<p>HOTELTREUHAND GmbH (The Tourism Investment Services).</p>
	<p>ÖSTERREICHISCHER REISEBÜROVERBAND (Austrian Association of Travel Agencies).</p>
	<p>ÖSTERREICHISCHE HOTELIERVEREINIGUNG (Austrian Hotel Association).</p>
	<p>BUND ÖSTERREICHISCHER GASTLICHKEIT - RESTAURANTS (Association of Austrian Hospitality).</p>

BELGIUM	
PUBLIC INSTITUTIONS	
AT NATIONAL LEVEL	NO MINISTRY COMPETENT
AT REGIONAL LEVEL	
– <i>FLANDERS</i>	VLAAMS MINISTER VAN KUULTUR EN BRUSSELSE AANGELEGENHEDEN (Minister for Culture and Brussels Affairs.)
	<p>VLAAMS COMMISSARIAT GENERAL VOOR TOERISME - VCGT (The Flemish Tourist Office)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Preparation and implementation of tourism legislation on hotels, campsites, social tourism and on travel agencies; - Provision of financial aid to the tourism sector in order to develop the tourist infrastructure and tourism activities in Flanders; - Development and monitoring of own investment projects in the tourism sector; - Research, planning, development and promotion both at home and abroad, of tourism in Flanders and the greater Brussels region; - Co-operation with the "Office De Promotion Du Tourisme" on the marketing, promotion, maintenance of eight national tourist offices abroad and the tourism office in Brussels.
	<p>VLAAMSE ADVIESRAAD VOOR TOERISME (The Flemish Tourist Advisory Office)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Advice on all policy-related questions coming within the competence of the VCGT; - Establishment of six technical committees.
– <i>BRUSSELS</i>	MINISTRE POUR TRAVAUX PUBLICS, COMMUNICATIONS, RENOVATION DES SITES D'ACTIVITES ECONOMIQUES DESAFFECTES, SANTE ET TOURISME / MINISTER VOOR OPENBARE WERKEN, COMMUNICATIE, ECONOMISCHE HEROPLEVING, GEZONDHEID EN TOERISME (Minister for Public Works, Communications, Economic Regeneration, Health and Tourism).

(Brussels)	<p>COMMISSARIAT GENERAL AU TOURISME - CGT (The Brussels Tourism Office).</p> <p>Since 1 January 1994 tourism has been managed separately in Brussels and Wallonie. As a result CGT administrations are currently being established within the French speaking and Flemish communities of Brussels.</p>
– WALLONIE	<p>MINISTRE POUR ECONOMIE, PME, TOURISME, RELATIONS EXTERIEURES, COMMERCE EXTERIEUR ET PATRIMOINE (Minister for Economy, SMEs, Tourism, External relations, Foreign Trade and National Heritage).</p>
	<p>COMMISSARIAT GENERAL DU TOURISME - CGT (The tourist office for Wallonie).</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Preparation and implementation of tourism legislation (hotels, travel agents, holiday parks, and rural and social tourism); - Tourism development, allocation of tourism subsidies for social tourism, marketing, hotel renewals and development, tourism buildings (only hotels, open air accommodation and self-catering accommodation).
	<p>OFFICE DE PROMOTION DU TOURISME - OPT (Tourist Promotion Office)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Marketing of the regions of Wallonie and Brussels: strategy, actions aimed at the trade and general public in Belgium and on the eight foreign markets together. <p>Together with the VCGT responsible for:</p> <ul style="list-style-type: none"> - Management of the eight national tourist offices in foreign countries ; - The "Maison du Tourisme" in Brussels; - Promotion of business tourism in Belgium.
	<p>CONSEIL SUPERIEUR DU TOURISME (Tourism High Commission).</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Giving advice on all tourism-related draft legislation; - The establishment of six "COMITES TECHNIQUES" which are responsible for provincial tourism federations; cities, towns and villages, tourist offices; rural tourism; low-cost tourism; businesses providing accommodation; travel agencies, open-air accommodation and social tourism.

<p>– <i>OST-KANTONE</i></p>	<p>MINISTER - "MINISTERPRÄSIDENT" (President of the German-speaking Community)</p> <p>VERKEHRSAMT DER OSTKANTONE - VAK (The Transport Office)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Marketing, publicity, information, no legislation.
<p>AT LOCAL LEVEL</p>	<p>10 FEDERATIONS PROVINCIALES/PROVINCIALE FEDERATIES (provincial federations)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - The promotion of tourism in the province and tourism information provision.
	<p>PLAATSELIJK BUREAUS VOOR TOERISME / SYNDICATS D'INITIATIVES (local tourist offices).</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Providing information on the local villages.

DENMARK

PUBLIC INSTITUTIONS

AT NATIONAL LEVEL	<p>ERHVERVSMINISTER (Minister for Business and Industry)</p> <p>ERHVERVSMINISTERIET (Ministry for Business and Industry)</p> <p>Main duties:</p> <ul style="list-style-type: none"> - Strategic planning and development of tourism; - Legal aspects; - Creation of good conditions for the tourism industry, including negotiations with other ministries and organisations; - Working for the preservation and development of the cultural and natural heritage in co-operation with other relevant authorities; - Administration of an " industry network scheme". <p>DANMARKS TURISTRÅDS (The Danish National Tourist Board) - (A tourism marketing organisation)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Coordination of the promotion of Denmark as a tourist destination abroad and in Denmark (this includes both leisure and business tourism); - Analysing and monitoring the markets as well as developing new markets. <p>TURIST POLITISK KONTAKTUVALG (Contact Committee for Tourism Policy).</p> <p>The committee is an advisory group to the Minister. Members of the committee are main industry organisations and other relevant organisations.</p> <p>It is a political forum for discussing a wide range of tourism related subjects.</p>
AT REGIONAL LEVEL	<p>AMTSKOMMUNER (county councils)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Development of regional strategies and Coordination with other policy areas.

AT LOCAL LEVEL	<p>KOMMUNER (Municipalities)</p> <p>Main activities include:</p> <ul style="list-style-type: none"> - Provision of information and services for tourists through the TURIST BUREAUER (Tourist Information Offices); - Local strategies and development.
	<p>TURIST BUREAUER (Local tourism information offices)</p> <p>Main duties:</p> <ul style="list-style-type: none"> - Information, guidance etc.; - Reservation of hotel rooms.
PUBLIC/PRIVATE INSTITUTIONS	
AT REGIONAL LEVEL	<p>TURIST EKSPORTGRUPPER (Tourism Exporting Groups)</p> <p>The tourism exporting groups are composed of participants from both the private and public sector.</p> <p>Main duties:</p> <ul style="list-style-type: none"> - Promotion abroad and in Denmark of the geographical area that the exporting group covers; - Development of tourism in the region.
	<p>CONGRESS AND CONVENTION AGENCIES</p> <p>In the four largest towns in Denmark congress and convention agencies have been established.</p> <p>Main duties:</p> <ul style="list-style-type: none"> - Promotion; - Assisting in the practical implementation of arrangements.
PRIVATE SECTOR	
AT NATIONAL LEVEL	<p>TURISMENS FÆLLESRÅD (The Tourism Industry Council)</p> <p>An umbrella organisation for private industry (e.g. major hotel chains or SAS etc.).</p> <p>The Council acts as a partner to the Ministry responsible for tourism and gives advice.</p> <p>It co-ordinates tourism industry activities.</p>
AT LOCAL LEVEL	<p>TURISTFORENINGER (Local Tourist Associations)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - In co-operation with the local authorities, local tourism information offices (turistbureauer); - Provision of a forum for discussing the development of tourism locally.

FINLAND

PUBLIC INSTITUTIONS

AT NATIONAL LEVEL

ULKOASIANMINISTERIÖ (Minister For Foreign Trade)
KAUPPA- JA TEOLLISUUSMINISTERIÖ
(Ministry Of Trade And Industry)

KAUPPAOSASTO (Trade Department)

Responsible for:

- Co-ordination and implementation of tourist policies;
- Management of the Finnish Tourist Board;
- International co-operation.

YRITYSKEHITYSOSASTO (Business Development
Department)

Responsible for:

- Development and financing of small and medium-sized enterprises.

YMPÄRISTÖMINISTERIÖ (Ministry Of Environment)

Responsible for:

- Integration of environmental policy;
- Land use planning;
- Nature conservation;
- Outdoor recreation;
- Preserving cultural heritage and landscape.

LIKENNEMINISTERIÖ (Ministry of Transport and
Communication)

Responsible for:

- Transportation;
- Telecommunications.

OPETUSMINISTERIÖ (Ministry Of Education)

Responsible for:

- Vocational training in the field of tourism;
- Youth tourism.

(at national level)	<p>MAA- JA METSÄTALOUSMINISTERIÖ (Ministry of Agriculture & Forestry)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Administration of state-owned areas: recreation, fishing and hunting sports.
	<p>SISÄASIAINMINISTERIÖ (Ministry of the Interior)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Regional tourism development.
	<p>SOSIAALI- JA TERVEYSMINISTERIÖ (Ministry of Social Affairs and Health)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Social tourism.
	<p>KULUTTAJAVIRASTO (National Consumer Administration)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Consumer affairs regarding tourism; - Supervision of the guarantee system regarding package travel.
	<p>MATKAILUN EDISTÄMISKESKUS (Finnish Tourist Board)</p> <p>A Government agency whose members of the board of directors come mainly from the tourist industry. The Chairman is the Secretary General of the Ministry of Trade and Industry.</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Marketing tourism in Finland to both the domestic market and abroad; - 14 tourist offices abroad.
	<p>EU-ASIAIN KOMITEAN ALAINEN MATKAILUPALVELUT JAOSTO (EEA/EU Subcommittee For Tourism Services)</p> <p>This body consists of representatives of the Ministries of Trade and Industry, Foreign Affairs, Transport and Communications, and the Environment, the Finnish Tourist Board, the National Consumer Administration, The Association of Finnish Local Authorities, Hotel and Restaurant Council, Hotel and Restaurants Workers Union, the Association of regional tourism organisations, Association of Finnish Travel Agents, the Finnish Ship owners Association and Finnair.</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Proposals and co-ordination.

AT REGIONAL LEVEL	<p>LÄÄNINHALLITUKSET (Provincial state offices)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Handling of tourism-related questions.
	<p>MAAKUNNAN LIITOT (Regional councils)</p> <p>Formed by the municipalities to deal with tourist issues.</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Development of initiatives similar to those undertaken within the framework of the EU structural funds.
AT MUNICIPALITY LEVEL	<p>All municipalities belong to the Association of Finnish Local Authorities.</p> <p>The larger municipalities have tourist offices, while in the others, tourism is mostly handled by the industry officials.</p>
PRIVATE SECTOR	
AT NATIONAL LEVEL	<p>MATKAILUN KOULUTUS- JA TUTKIMUSKESKUS (Centre For Tourism Studies - CTS)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Promotion of the tourist industry at the regional, national and international level; - Collection and dissemination of information; - Research on tourism; - Consultation with travel companies; - Training on the provision of tourist services and tourism professions.
	<p>HOTELLI- JA RAVINTOLANEUVOSTO (Hotel And Restaurant Council)</p> <p>Umbrella organisation for hotel chains and private enterprises.</p>
	<p>KESKUSKAUPPAKAMARI (Central Chamber of Commerce)</p> <p>Minor role in the development of tourism.</p>
	<p>SUOMEN MATKATOIMISTOALAN LIITTO (Association of Finnish Travel Agents)</p> <p>Umbrella organisation for tour operators and travel agencies.</p>
	<p>SUOMEN VARUSTAMOYHDISTYS (Finnish Ship Owners Association)</p> <p>Umbrella organisation for Finnish ship owners.</p>

(at national level)	<p>LINJA-AUTOLIITTO (The Finnish Bus and Coach Association)</p> <p>Umbrella organisation for Finnish bus companies.</p>
	<p>SUOMEN RETKEILYMAJAJÄRJESTÖ (Finnish Youth Hostel Association)</p> <p>Umbrella organisation for youth hostels.</p>
	<p>SUOMEN MATKAILULIITTO (Finnish Travel Association)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Managing camping sites belonging to the Association's national network.
	<p>LOMARENGAS (the holiday chain)</p> <p>The main cottage rental association in Finland.</p>
	<p>HELSINKI - FINLAND CONGRESS BUREAU</p> <p>Umbrella organisation for congress and conference cities, centres and service providers.</p>
	<p>FINLAND FESTIVALS</p> <p>Umbrella organisation for major cultural events.</p>
	<p>AUTOLIITTO (Automobile and Touring Club of Finland)</p> <p>SUOMEN LATU (Finnish Ski Track Association)</p> <p>SF-CARAVAN</p> <p>Consumer organisations which provide members with tourism information and services.</p>
	<p>MATKAILUASIAMIEHET, SUOMEN OPASLIITTO (Tourist Officers Association, Federation of Finnish Tourist Guides)</p> <p>Professional organisations.</p>
AT REGIONAL LEVEL	<p>SUOMA - SUOMEN MATKAILUN ALUEORGANISAATIOIDEN YHDISTYS (Association of Regional Tourism Organisations)</p> <p>Umbrella organisation for regional tourism bodies.</p>

FRANCE

PUBLIC INSTITUTIONS

AT NATIONAL LEVEL

MINISTRE DE L'EQUIPEMENT, DES TRANSPORTS ET DU TOURISME (Minister of Establishments, Transport and Tourism)

MINISTERE DE L'EQUIPEMENT, DES TRANSPORTS ET DU TOURISME - DIRECTION DU TOURISME (Ministry of Establishments, Transport and Tourism, Tourism Directorate)

Responsible for:

- Legislative power;
- International relations;
- Economic policy- monitoring and control of regional policies;
- Promotion activities;
- Financial and budgetary power.

COMITE INTERMINISTERIEL POUR LE TOURISME SOCIAL (Inter-ministerial committee for social tourism)

AGENCE NATIONALE DU CHEQUE VOYAGE (National Agency for Travel Cheques) - A body controlled by the Ministère de l'Economie et du Tourisme.

Main activities:

- Promotion of social tourism;
- Consultation.

CONSEIL NATIONAL DU TOURISME (National Tourism Council) - consists of representatives of the industry and local authorities and comes under the Minister responsible for tourism.

Main activities:

- Consultative body for tourism - related questions;
- Disciplinary commission for those working in the tourist industry, monitoring of quality;
- Participation of tourism professionals in devising national policies.

AT REGIONAL LEVEL	<p>DELEGATIONS REGIONALES AU TOURISME (State Services - Regional offices of the national central administration)</p> <p>Responsibilities include:</p> <ul style="list-style-type: none"> - Participation in the implementation of the tourism regulation; - Public funds planning, budgetary and financial management of planning contracts; - Advisory services to the council members and to the economic operators; - Economic monitoring.
	<p>COMITES REGIONAUX DU TOURISME (Regional Committees for tourism)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Development and follow-up of the regional plan for tourism and leisure development; - Promotion of the region in France and abroad; - Budget planning and planning control; - Economic monitoring
	<p>COMMISSION REGIONALES D'ACTIVITES TOURISTIQUES (advisory committee) - created by law (13.07.92), it consists of representatives from the public and professional sectors.</p> <ul style="list-style-type: none"> - Advisory body on all tourism related issues.
	<p>PREFECTURES DE DEPARTEMENT (departmental administrations)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Implementation of national legislation. <p>COMITES DEPARTEMENTALES DU TOURISME (departmental tourism committees)</p> <p>Responsible for :</p> <ul style="list-style-type: none"> - Contributing to the development, promotion and marketing of tourist products in cooperation with economic operators and other bodies concerned <p>COMMISSIONS DEPARTEMENTALES D'ACTIONS TOURISTIQUES (tourism advisory committees for the Departements)</p> <p>Responsibilities include:</p> <ul style="list-style-type: none"> - A consultative role in disciplinary questions and classification; - Administrative power with regard to the practice of commercial tourism activities.

PUBLIC/PRIVATE INSTITUTIONS	
AT NATIONAL LEVEL	<p>MAISON DE LA FRANCE - (A partnership between the national administration, local authorities and the industry, under the control of the Directorate responsible for Tourism.)</p> <p>Responsible for:</p> <ul style="list-style-type: none">- Promotion of France abroad. <p>AGENCE FRANCAISE D'INGENIERIE TOURISTIQUE (AFIT) - (Public sector body under the control of the State)</p> <p>Responsible for:</p> <ul style="list-style-type: none">- Tourism product development for the domestic and export market.
	<p>OBSERVATOIRE NATIONAL DU TOURISME (National Tourism Observatory)</p> <p>Main activities:</p> <ul style="list-style-type: none">- Socio-economic analysis of tourism;- Statistics.

GERMANY

PUBLIC INSTITUTIONS

AT NATIONAL LEVEL

DEUTSCHER BUNDESTAG (Federal Parliament)- A Parliamentary Committee for Tourism has existed since 1991.

Main activity:

- Preparation of parliamentary decisions.

WIRTSCHAFTSMINISTER (Minister For Economic Affairs)

PARLAMENTARISCHER STAATSEKRETÄR IM BMWi (Parliamentary Secretary Of State For Economic Affairs)

BUNDESMINISTERIUM FÜR WIRTSCHAFT - BMWi (Ministry for Economic Affairs)

Tourism Unit in the Directorate General for Enterprise Policy, services, research and technology - policy in the Federal Ministry.

Responsible for:

- Co-ordination of interests at federal level: (foreign affairs, justice, transport, environment);
- Development of strategic policy lines and improvement of the business environment, provision and maintenance of framework conditions;
- Enhancement of the efficiency and competitiveness of the German tourism industry (especially SMEs);
- Formation of Bund-Länder activities. Co-operation with Tourism Advisory Committee;
- Representation of Germany in EU and international organisations.

PUBLIC/PRIVATE INSTITUTIONS

AT NATIONAL LEVEL

DT. ZENTRALE FÜR TOURISMUS - DZT (German National Tourist Organisation) - A body with public and private membership (private sector associations), which is in receipt of public and private sector funding, with a board of directors made up of representatives from industry, the federal ministries, and the Länder. It is the official tourist organisation responsible for promotion abroad.

Activities include:

- Strategic marketing planning for Germany as a tourist destination particularly for international visitors;
- NTO representation of the interests of German tourism in national and international bodies.

(at national level)	<p>DEUTSCHER FREMDENVERKEHRSVERBAND e.V. - DFV (German Association of Regional Tourist Organisations) - An association concerned with the development and promotion of domestic tourism on a national level. DFV is a member of DZT.</p> <p>Activities include:</p> <ul style="list-style-type: none"> - Representation of members' interests at national level; - Representation of own members within DZT; - PR and marketing services are offered to members.
PRIVATE SECTOR	
AT NATIONAL LEVEL	<p>DEUTSCHER REISEBÜROVERBAND - DRV (German Association of Travel Agencies and Tour Operators)</p> <p>Activities include:</p> <ul style="list-style-type: none"> - Representation of member interests at national and international level; - Special services offered to members (counselling on questions of management, finance, training, and marketing).
	<p>DEUTSCHER HOTEL- UND GASTSTÄTTENVERBAND - DEHOGA (German Association of Hotels and Restaurants)</p> <p>Activities include:</p> <ul style="list-style-type: none"> - Representation of members' interests (economic, labour relations, professional, etc.) at national level; - Assistance is given to members in the areas of promotion/marketing and training management.
	<p>DEUTSCHER BÄDERVERBAND e.V. - DBV (German Association of Spas and Health Resorts)</p> <p>Activities include:</p> <ul style="list-style-type: none"> - Representation of members' interests at national level; - Support and development of spa and health tourism; - Preservation of natural and recreational resources; - Support for scientific research; - Development of quality standards.
	<p>VERBAND MITTELSTÄNDISCHER REISEUNTERNEHMEN asr (Association of Independent Travel Agencies and Tour Operators).</p>
	<p>BUNDESVERBAND DEUTSCHER OMNIBUSUNTERNEHMEN (Association of German Coach Enterprises).</p>
	<p>INTERNATIONALER BUSTOURISTIK VERBAND, RDA (International Association for Coach Tourism).</p>

(at national level)	<p>DEUTSCHES FREMDENVERKEHRSPRÄSIDIUM (German Association of the Tourist and Travel Industry)</p> <p>Activities include:</p> <ul style="list-style-type: none"> - Representation of the common interests of the German tourism industry to Parliament and Government; - Conceptual work on the development of future tourism policies.
<p>PUBLIC INSTITUTIONS</p>	
<p>AT REGIONAL LEVEL</p>	<p>LÄNDER PARLIAMENTS AND GOVERNMENTS (Parliamentary Committees and Ministries for Economic Affairs)</p> <p>Main duties:</p> <ul style="list-style-type: none"> - Leading role in tourism at state level; - Support for infrastructure development; - Support schemes for tourism SMEs and destinations (spas and social affairs, marketing and research).
	<p>LANDES- UND REGIONALFREMDENVERKEHRS- VERBÄNDE (Tourism association for the German Länder and regions)</p>

GREECE

PUBLIC INSTITUTIONS

AT NATIONAL LEVEL

ΥΠΟΥΡΓΟΣ ΤΟΥΡΙΣΜΟΥ (Minister of Tourism)
ΥΠΟΥΡΓΕΙΟ ΤΟΥΡΙΣΜΟΥ (Ministry of Tourism)

Responsible for:

- the control and co-ordination of the actions of the Greek National Tourism Organisation and its local offices;
- the development and implementation of tourism policy;
- The Hellenic Chamber of Hotels;
- The State School of Tourism Professions.

ΕΛΛΗΝΙΚΟΣ ΟΡΓΑΝΙΣΜΟΣ ΤΟΥΡΙΣΜΟΥ (EOT)
(Greek National Tourism Organisation -GNTO)

This is the main body for implementing and developing programmes for development and co-ordination of tourism related actions.

Responsible for:

- Promotion of Greece - domestic and abroad;
- Organisation of cultural events;
- Provision of tourism infrastructure;
- Information for tourism professionals (i.e. tour operators, etc.) and tourists;
- Licensing and monitoring of hotels, all tourism facilities, travel agencies and tourism professions.

ΔΙΟΙΚΗΤΙΚΟ ΣΥΜΒΟΥΛΙΟ ΕΟΤ

The *Administrative Council of GNTO* is made up of the President and the Secretary General of GNTO, a representative of the Ministry of Culture, and four representative members of the tourism sector, selected by the Minister.)

ΕΛΛΗΝΟΔΟΧΕΙΑΚΟ ΕΠΙΜΕΛΗΤΗΡΙΟ ΕΛΛΑΔΟΣ
(HELLENIC CHAMBER OF HOTELS -XEE)

Represents the Greek hoteliers and advises the GNTO.

AT LOCAL LEVEL

11 ΠΕΡΙΦΕΡΕΙΑΚΕΣ ΔΙΕΥΘΥΝΣΕΙΣ Ε.Ο.Τ.
(11 REGIONAL GNTO DIRECTIONS)

Responsible for:

- Operation of tourist offices;
- Tourism information provision for both professionals (i.e. tour operators) and travellers in the domestic market and abroad.

ICELAND

PUBLIC INSTITUTIONS

AT NATIONAL LEVEL	<p>RÁÐHERRA FERÐAMÁLA (Minister for Tourism). SAMGÖNGURÁÐUNEYTIÓ (Ministry Of Communication Transport And Tourism)</p> <p>Responsible for :</p> <ul style="list-style-type: none"> - Co-ordination; - Representation at the international level.
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PUBLIC/PRIVATE INSTITUTIONS

AT NATIONAL LEVEL	<p>FERÐAMÁLARÁÐ ÍSLANDS (Icelandic Tourist Board) 23 Members (Five members are appointed by the Minister and 18 are appointed by the industry.)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Organisation and planning of tourism in Iceland; - Marketing and PR. abroad; - International relations; - Consulting and assisting providers of tourist services and co-ordination of their activities; - Environmental initiatives; - Monitoring of the quality of tourist services; - Operation of offices abroad.
AT LOCAL LEVEL	<p>LOCAL OFFICES</p> <ul style="list-style-type: none"> - Promotion of tourism in the region; - Information services.

IRELAND

PUBLIC INSTITUTIONS

AT NATIONAL LEVEL

MINISTER FOR TOURISM AND TRADE:
DEPARTMENT OF TOURISM AND TRADE - TOURISM
DEPARTMENT

Responsible for:

- Policy formulation;
- Funding and monitoring executive agencies;
- Overall co-ordination of the "Operational Programme for Tourism", involving expenditure by a number of State departments and agencies and private sector initiatives.

BOARD FAILTE EIREANN (BFE)
(IRISH TOURIST BOARD)

The executive agency responsible for promoting and developing tourist domestic and inbound traffic to Ireland, through the implementation of government policy.

Responsible for:

- Administration of grant schemes for the development of accommodation and amenities, using national and EU funds;
- Overseas marketing and market research;
- Coordination of industry activities;
- Monitoring of quality and standards.

COUNCIL FOR EDUCATION, RECRUITMENT AND
TRAINING FOR THE HOTEL, CATERING AND TOURIST
INDUSTRY (CERT)

Responsible for:

- Provision of training for those entering the hotel, catering and tourism industry;
- Provision of vocational training.

PUBLIC/PRIVATE SECTOR INSTITUTIONS	
AT NATIONAL LEVEL	<p>TOURISM COUNCIL - An advisory body chaired by the Minister of Tourism consisting of 24 Members who represent government departments, state agencies and major tourism sectors e.g. Aer Lingus, the National Airlines.</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - National forum for consultation between the tourism industry, state tourism agencies and governmental departments; - Advisory body to the Minister for Tourism - operates via three specialist working groups which focus on key issues affecting tourism development. The subjects covered are access, marketing and product quality/development.
AT REGIONAL LEVEL	<p>6 REGIONAL TOURISM ORGANISATIONS (RTOs) (Established and controlled by the BFE).</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Provision of information and services for tourists through the operation of a national network of Tourist Information Offices; - Regional marketing; - Production of regional and local tourism development plans; - Encouraging of environmental awareness; - Initial assessment of investment projects applying for fund support; - Accommodation inspections and monitoring of standards; - Management of the County Tourism Committees; - Organisation of an Annual regional forum of all the committees.
AT LOCAL LEVEL	<p>COUNTY TOURISM COMMITTEES (New institutional structures, in the process of being established, based on county divisions.)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Stimulation and coordination of tourism projects at the local level; - Formulation of county tourism action plans for incorporation in the regional tourism plans produced by the RTOs.

(at local level)	<p>SHANNON FREE AIRPORT DEVELOPMENT COMPANY LIMITED (SFADCO) Acts as RTO for the Shannon Region.</p> <p>Responsible for:</p> <ul style="list-style-type: none">- Promotion and development of activities concerning airline services, passenger traffic and freight traffic through Shannon airport;- The development and marketing of SFADCO-owned tourism products overseas.
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ITALY

PUBLIC INSTITUTIONS

AT NATIONAL LEVEL	<p>SOTTO-SEGRETARIO DI STATO ALLA PRESIDENZA DEL CONSIGLIO (Under-Secretary of State at the Presidency of the Council of Ministers)</p> <p>PRESIDENZA DEL CONSIGLIO DEI MINISTRI - DIPARTIMENTO DEL TURISMO (Presidency of the Council of Ministers - Department of Tourism)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Definition of general policy, mainly concerning international negotiations and agreements; - Participation in the definition and implementation of the Community activity; - Orientation and coordination of the activities of the Regions and of the tourist enterprise regulation; - Collection and preparation of statistical information; - Control of relevant national bodies: ACI (automobile club), CAI (alpine club), ENIT (National Tourist Board).
	<p>ENTE NAZIONALE ITALIANO PER IL TURISMO - ENIT (Italian State Tourist Board)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Organisation and implementation of promotions abroad.
AT REGIONAL LEVEL	<p>ASSESSORATO (Regional "Ministry") in every region</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Planning and implementation of tourist development and all administrative competencies regulating the sector.
AT LOCAL LEVEL	<p>AZIENDA DI PROMOZIONE TURISTICA (Tourist Promotion Board) in some regions it can cover the whole territory</p> <p>PRO-LOCO (Local Agency)</p> <p>PROVINCIA (District)</p> <p>COMUNE (Municipality)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Promotion and management of local resources.

LUXEMBOURG

PUBLIC INSTITUTIONS

AT NATIONAL LEVEL

MINISTRE DU TOURISME (Minister For Tourism)
MINISTERE DU TOURISME (Tourism Ministry)

Responsible for:

- Implementation of the 5th Five-year-programme for the development of the tourism infrastructure;
- Execution of the projects of the municipalities, tourist offices, modernisation projects for the hotel industry, environmental projects;
- International relations and cross border co-operation;
- Holidays-on-a-farm project;
- Preservation of the cultural heritage;
- Improvement of information facilities such as data bases;
- Studies on the tourist infrastructure;
- Camping holidays;
- Cycling tracks;
- Organisation of tourism fairs abroad;
- Conference tourism;
- Youth hostels;
- Management of local tourist info-offices.

OFFICE NATIONAL DU TOURISME (National Tourist Office)

- Market analyses;
- Promotion activities (publicity campaigns, exhibitions, etc);
- Tourism training and education for employees.

NETHERLANDS

PUBLIC INSTITUTIONS

AT NATIONAL LEVEL

STAATSECRETARIS VOOR ECONOMISCHE ZAKEN
(The Secretary Of State For Economic Affairs)

MINISTERIE VAN ECONOMISCHE ZAKEN - Afdeling
Tourisme
(Ministry For Economic Affairs - Tourism Division)

Responsible for:

- Co-ordination, formulation and execution of tourism policy;
- Co-operation with the Ministries of Welfare, Public Health and Culture, Transport and Public Works, Agriculture, Nature Management and Fisheries;
- Funding of the NBT Dutch Tourist Board, which promotes tourism in the country and abroad;
- International relations and representation in international organisations.

MINISTERIE VAN LANDBOUW NATUURBEHEER EN
VISVANGST (Ministry of Agriculture, Nature Management and Fisheries)

Responsible for:

- Promotion of open-air recreation.

PUBLIC/PRIVATE SECTOR INSTITUTIONS

AT NATIONAL LEVEL

NEDERLANDSBUREAU VOOR TOERISME - NBT (Dutch
Tourist Board)

Responsible for:

- 50:50 co-financing by industry and government;
- Promotion and stimulation of domestic and incoming tourism.

KONINKLIJKE NEDERLANDSE TOERISTENBOND -
ANWB (The Royal Netherlands Tourist Association) - a
consumer organisation which promotes tourism and leisure
activities.

Responsible for:

- Preparation and introduction of classification schemes;
- Supply of consumer information services and research;
- International price comparisons.

(at national level)	<p>STICHTING TOERISME & RECREATIE (The Tourism and Leisure Foundation) - AVN (ANWB, VVV, NBT)</p> <ul style="list-style-type: none"> - Set up by the three above-mentioned organisations to co-ordinate promotional activities for domestic tourism.
AT LOCAL LEVEL	<p>VERENIGINGEN VOOR VREEMDELINGEN VERKEER (local tourism offices)</p> <ul style="list-style-type: none"> - 400 local tourism offices, 15 regional "promotional" offices; - Varying scale of operations, available budgets and professional staff (smaller ones rely on volunteers).

NORWAY

PUBLIC INSTITUTIONS

AT NATIONAL LEVEL	<p>NÄRINGS - OG ENERGIDEPARTEMENT (Ministry of Industry and Energy, Industrial Policy Department)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Official tourist policy; - Interdepartmental co-operation; - Increasing the tourist industry's profitability; - Foundation of the National Tourist Board (NORTRA), the central marketing agency of the Norwegian tourism industry.
AT REGIONAL LEVEL	<p>INTERDEPARTMENTAL GRUPPE FOR TURIST SPØRSMÅL I EØS (Inter ministerial Committee related to Questions on Tourism in the EEA)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Co-ordination of tourist policies.
	<p>KOMMUNER KONTORER (Offices Of The County Municipalities And Municipalities)</p>

PORTUGAL

PUBLIC INSTITUTIONS

AT NATIONAL LEVEL

MINISTERIO DO COMERCIO E TURISMO (Ministry of Commerce and Tourism)

SECRETERIA DE ESTADO DO TURISMO (Secretary of State for Tourism)

Responsible for:

- General Directorate for Tourism (see below);
- National Institute for Training in Tourism (see below);
- General Inspectorate for gambling activities (inspection and exploitation of gambling activities);
- National enterprise for tourism (ENATUR, SA) (management and exploitation of the "Pousadas" chain, exploitation of the national heritage for tourism purposes);
- Tourism Fund (stimulates investments by credit assured for the sector);
- Investments, commerce and tourism - ICEP (tourist information and promotion, Public Relations, technical assistance);
- Coordination between the national and regional authorities.

DIRECÇÃO GERAL DO TURISMO (General Directorate for Tourism)

Responsible for:

- Organisation and distribution of the documentation on Portuguese tourism;
- Managing and protection of tourist resources and of cultural heritage;
- Development and management of tourist services;
- Definition of the tourist policy;
- Promotion.

INSTITUTO NACIONAL DE FORMAÇÃO TURÍSTICA
(National Institute For Training In Tourism)

Responsible for:

- Promotion and co-ordination of education and training for employers in the tourist industry;
- Promotion of the tourist profession abroad.

(at national level)	<p>COMITÉ CONSULTIVO DE TURISMO (Advisory Committee on Tourism)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Consultation and coordinating tasks between the Department, the tourist regions and public as well as representatives from the private sector of the tourist industry.
AT LOCAL LEVEL	<p>DEPARTAMENTOS REGIONAIS E LOCAIS DE TURISMO (Regional and Local Departments of Tourism)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Exploitation of regional tourist resources and local heritage; - Promotion of the tourist supply in the domestic market and abroad.

SPAIN

PUBLIC INSTITUTIONS

AT NATIONAL LEVEL

COMISION INTERMINISTERIAL DE TURISMO
(Intergovernmental body created by Royal Decree 14 January 1994).

Responsible for:

- Developing greater co-ordination between the different government departments of the national administration on issues that concern tourism;
- Devising work groups to consider particular tourism issues;
- Considering all proposed actions, measures with an impact on tourism.

MINISTRO DE COMERCIO Y TURISMO (Minister For
Commerce And Tourism)

MINISTERIO DE COMERCIO Y TURISMO (Ministry For
Commerce And Tourism)

Responsible for:

- Co-ordination of all tourist related policies of the various ministries and public administration;
- Evaluation and formulation of the basic action plans for the government;
- Regulation of academic tourism qualifications;
- International and diplomatic relations;
- Tourism statistics.

(at national level)	<p>SECRETARIA GENERAL DE TURISMO (Secretariat General for Tourism).</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Implementation and administration of the government's tourist policy; - Control of government tourist services; - Co-ordination of the foreign tourism policy between the State and the autonomous regions; - Co-ordination and encouragement of public and private sector external promotional activities and initiatives; - Determination of general guidelines for the promotion of tourism abroad; annual preparation of the "General Programme for the Promotion of Tourism Abroad" for the benefit of the autonomous regions; - Implementation of architectural projects involving the Paradores de Turismo (public hotel chain); - Provision of financial support to companies for the implementation of tourist promotion projects abroad and the opening of tourist markets; - Granting state aid to companies to launch and widen their commercial activities abroad; - Tourism training and education - this responsibility is shared with the Autonomous regions; - Statistics, studies, evaluation of the market trends.
	<p>DIRECCION GENERAL DE ESTRATEGIA TURISTICA (Directorate General for Tourism Strategy)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Co-ordination of tourist related matters and competencies between the autonomous communities and territorial entities. - International relations; - Preparing and drafting of international instruments such as conventions; - Administration of funds for tourist projects; - Studies of the different aspects and impacts of tourism, especially on the infrastructure of the sector concerned; - Development of tourist projects (innovation of the sector, new promotion schemes); - State aids for companies and public or private Spanish institutions: analysis of the contribution, products and destination of the company.

(at national level)	<p>DIRECCION GENERAL DE PROMOCION TURISTICA (Directorate General for the Promotion of Tourism)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Tourism promotion and marketing activities abroad according to the directives given by the Secretaría General de Turismo as an important sector of the national economy; - Integrated presentation of the Spanish tourism supply, highlighting the individuality of the various regions; - Running of info-campaigns, PR., advertising; cooperation with the Press; - Publication of printed material, production of audio-visual info-material; - Distribution of tourist information in Spain and abroad. - Establishment of tourism-related data banks; - Participation in tourist fairs and exhibitions; - Co-operation with local administrations and industry.
	<p>OFICINAS ESPAÑOLAS DE TURISMO EN EL EXTRANJERO (Spanish Tourism Offices Abroad)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Overseas promotion and marketing activities as directed by TURESPAÑA; - Co-operation with the autonomous regions concerning their promotion overseas in line with the General Programme of overseas tourism promotion.
	<p>INSTITUTO DE ESTUDIOS TURISTICOS (Institute of Tourism Studies)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Gathering documentation, information and research on tourism; - Provision of specialist services in market research and training of human resources; - Development of distribution systems and dissemination of information.
	<p>ESCUELA OFICIAL DE TURISMO (Official School of Tourism)</p> <ul style="list-style-type: none"> - The national tourism school for the training of tourist professionals and providers of tourist services.
	<p>PARADORES DE TURISMO (public hotel chain)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Monitoring of the quality of tourist accommodation establishments; - Protection of the cultural heritage and environment.

AT REGIONAL LEVEL	<p>"CONSEJERIAS" (Administrative regional councils in the autonomous provinces)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Tourism promotion and planning activities at the regional level; - Control of the tourist activities of companies.
AT LOCAL LEVEL	<p>MUNICIPALIDAD (Municipality)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Promotion of tourist activities on a local level.
PRIVATE SECTOR	
AT NATIONAL LEVEL	<p>CONFEDERACION ESPAÑOLA DE ORGANIZACIONES EMPRESARIALES - CEOE (Confederation of Spanish Industry).</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Representation of the tourist industry as a social partner organisation; - Active participation in the policy - making process.

SWEDEN

PUBLIC INSTITUTIONS

AT NATIONAL LEVEL

NÄRINGSMINISTER (Minister For Industry and Commerce)
NÄRINGSDEPARTEMENTET (Ministry of Industry and Commerce)

Responsible for:

- Representation of Swedish tourism interests with international organisations;
- Development of co-operation between state and industry.

PUBLIC/PRIVATE INSTITUTIONS

AT NATIONAL LEVEL

STYRELSEN FÖR SVERIGEBILDEN
(Image Sweden - Agency created by the Government)

The board of Image Sweden consists mainly of business and marketing professionals.

Responsible for:

- Strategic planning of promotional activities;
- Evaluation of promotional activities already carried out;
- International tourism contacts;
- Dissemination of information abroad about Sweden.

TRAVEL AND TOURISM COUNCIL Inc. ("Next Stop SWEDEN") - created following a decision in the Parliament. It is a joint enterprise which includes a large part of the tourism sector.

Responsible for:

- Practical implementation of joint promotional activities on behalf of Image Sweden;
- Management of offices established abroad to promote Sweden.

SVERIGES EXPORTRÅD (Swedish Trade Council)

- Supplier of services to Image Sweden.

SVENSKA INSTITUTET (Swedish Institute)

- Supplier of services to Image Sweden.

AT REGIONAL/ LOCAL LEVEL	Joint actions between the municipalities and industry to run local offices with information services and implementation of promotional activities. Co-ordinated actions between the national and regional level.
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UNITED KINGDOM

PUBLIC INSTITUTIONS

AT NATIONAL LEVEL

MINISTER : SECRETARY OF STATE FOR NATIONAL HERITAGE

MINISTRY : DEPARTMENT OF NATIONAL HERITAGE

Responsible for:

- Tourism policy for England;
- Co-ordination of UK tourism policy.

MINISTER FOR TOURISM

Responsible for:

- Day to day co-ordination.

DEPARTMENT OF NATIONAL HERITAGE - The Tourism Division is divided in two branches

Branch 1

Responsible for:

- Sponsorship of the tourist industry in England;
- Inter-departmental co-ordination on issues like deregulation;
- Tourism representation at the international level.

Branch 2

Responsible for:

- All issues related to the British Tourist Authority and the English Tourist Board;
- Statistics on tourism worked on in a tourism unit within the Central Statistical Office;
- Tourism in England;
- Encouragement of inward and domestic tourism;
- Coordination of inter-departmental links;
- Representation of the British tourist industry abroad and in international organisations;
- Funding of the British Tourist Authority (BTA), which promotes Britain abroad and has a responsibility to further the development of tourist amenities and facilities throughout Great Britain;
- Funding of the English Tourist Board (ETB) which is responsible for development and promotion of tourism within England.

(at national level)	<p>REGIONAL UNIT of the Department of National Heritage</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Co-ordination between regional bodies, e.g. tourist boards, arts or sports councils with a view to forging stronger links and reduce overlapping actions; - Advice to the Department of Environment on the funding of projects through the European Regional Development Fund.
	<p>BRITISH TOURIST AUTHORITY - BTA</p> <p>(Funded by the Department of National Heritage, the BTA operates through its 32 overseas offices and representatives)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Promotion of Britain abroad; - Development of tourist amenities and facilities in Great Britain.
AT COUNTRY LEVEL	<p>MINISTER : SECRETARY OF STATE FOR WALES WELSH OFFICE</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Tourism in Wales; - Funding of the Wales Tourist Board.
	<p>MINISTER : SECRETARY OF STATE FOR SCOTLAND SCOTTISH OFFICE</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Tourism in Scotland; - Funding of the Scottish Tourist Board.
	<p>MINISTER : SECRETARY OF STATE FOR NORTHERN IRELAND</p> <p>DEPARTMENT OF ECONOMIC DEVELOPMENT (NORTHERN IRELAND)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Tourism in Northern Ireland; - Funding of the Northern Ireland Tourist Board.
	<p>ENGLISH TOURIST BOARD - ETB</p> <p>(Funded by the Department of National Heritage.)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Development and promotion of tourism in England; - Provision of information on tourism in England.

(at country level)	<p>WALES TOURIST BOARD - WTB (Funded by the Welsh Office.)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Development and promotion of tourism in Wales; - Provision of information on tourism in Wales.
	<p>SCOTTISH TOURIST BOARD - STB (Funded by the Scottish Office.)</p> <ul style="list-style-type: none"> - Development and promotion of tourism in Scotland; - Provision of information on tourism in Scotland; - Promotion and marketing of Scotland overseas, in collaboration with BTA.
	<p>NORTHERN IRELAND TOURIST BOARD - NITB (Funded by the Department for Economic Development - Northern Ireland.)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Development of tourism amenities and facilities in Northern Ireland; - Provision of information on tourism in Northern Ireland; - Promotion and marketing of Northern Ireland overseas.
AT LOCAL LEVEL	<p>LOCAL AUTHORITIES</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Provision of facilities and amenities; - Promotion, development and marketing of tourism in their area; - Funding and operation of Tourism Information Centres; - Influence tourism development through planning process; - Supporting their regional tourist boards.
	<p>TOURIST INFORMATION CENTRES (Mainly funded and operated by local authorities.)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Mainly funded and operated by Local Authorities; - Tourist information services; - Booking and reservation services; - Collection of TIC usage figures for use by the regional tourist boards and others.

PUBLIC/PRIVATE INSTITUTIONS	
AT REGIONAL LEVEL	11 REGIONAL TOURIST BOARDS (RTBs) FOR ENGLAND Responsible for: <ul style="list-style-type: none"> - Operating programmes on behalf of the England Tourist Board; - Representing private sector and local authority interests; - Maintaining the network of 570 tourist information centres in the country.
	32 AREA TOURIST BOARDS FOR SCOTLAND (They represent private sector and local authority interests.) Responsible for: <ul style="list-style-type: none"> - Operating programmes under contract to the Scottish Tourist Board; - Tourism advisory services to the industry and information to tourists.
AT LOCAL LEVEL	TRAINING AND ENTERPRISE COUNCILS - TECs (In Wales and England) Government funded. The tourism industry is represented on the management boards of these TECs. Responsible for: <ul style="list-style-type: none"> - Providing information, advice and training services to SMEs; - Vocational tourism training which leads to obtaining a National Vocational Qualification (NVQS); - Liaison with the regional tourist boards.
	LOCAL ENTERPRISE COUNCILS - LECs Similar responsibilities as TECs in Scotland only.
PRIVATE SECTOR	
AT NATIONAL LEVEL	BRITISH HOSPITALITY ASSOCIATION Mainly representing hotels, restaurateurs and caterers. Well-organised and influential group which lobbies government on behalf of its membership. Takes lead on issues such as training and raising standards.

(at national level)	<p>TOURISM SOCIETY</p> <p>Membership consists of the major operators in the British tourism industry.</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Lobbying Government putting forward the views of industry on tourism; - Consulting Government both officially and informally; - JICTOURS initiative - aimed at improving the statistics available to the industry.
	<p>ASSOCIATION OF LARGE VISITOR ATTRACTIONS - ALVA</p> <p>Represents the interests of large UK visitor attractions to Government.</p>
AT REGIONAL LEVEL	<p>3 REGIONAL TOURIST COMPANIES FOR WALES (Recently created private sector bodies)</p> <p>Responsible for:</p> <ul style="list-style-type: none"> - Co-ordinating tourism activity at local level; - Representing tourism industry interests.

ANNEX 4

Summary table of amounts set aside for tourism
within the Community support framework
for the period 1989-93

COUNTRY	Obj.1 (1989-93)	Obj.2 (1989-93)	Obj.5 (1989-93)	TOTAL
GREECE	243.6			243.60
SPAIN	182.0		17.68	199.68
FRANCE	34.3		105.60	184.00
IRELAND	188.6			188.60
ITALY	786.0	24.7	51.20	861.9
PORTUGAL	203.0			203.00
UK	46.2	173.9	5.80	225.9
DENMARK		0.5		0.50
GERMANY		5.7		5.70
NETHERLANDS		10.1	9.0	19.10
BELGIUM		12.9	4.40	17.30
LUXEMBOURG			0.40	0.40
TOTAL	1683.7	271.9	194.08	2149.68

*objective 2 (1992-1993) ECU 156.2 million

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