[Turkey to 2023 2](#_39bg2kqpjj5z)

[Georgia to 2025 3](#_thisqmqh20ol)

[Bulgaria to 2030 4](#_ckwh3yo1hw6i)

[Poland to 2020 5](#_iqc6usnben91)

[Croatian to 2020 7](#_8mqbufp81ncy)

[Albania to 2013 8](#_hgd5zwc0mqhi)

[Czech Republic to 2020 10](#_nligtb8p9z23)

[Slovak Republic to 2020 11](#_5k89l4l7w687)

[Hungary to 2030 13](#_jd52xvjervgl)

[Romania to 2030 14](#_aa84qj882ph2)

[Greece to 2020 15](#_3igjg2hkwieo)

[Estonia to 2020 17](#_5p4le461tkq0)

[France 19](#_yp09vbd85nuj)

[Ireland to 2025 22](#_aopcf6mzjy2)

[Italy to 2022 23](#_78ycu1z49dq0)

[Latvia to 2023 25](#_f1xb5dmwj0n)

[Lithuania to 2031 26](#_lm82xn15q8vx)

[Mexico to 2024 27](#_1pur847x39gt)

[Netherlands to 2030 29](#_ooht5u91k29z)

[Norway 31](#_ym5q1sw7t4gy)

[Spain 33](#_3gztycmlggeh)

[Uruguay 35](#_rmhisbcd3g0s)

[Cyprus 37](#_9epnbyl7wt2y)

[Dominican Republic 38](#_s2ah1gk9ij72)

[Finland 39](#_prrm4tyeavlj)

[Germany 40](#_ya3uzimpr744)

[Malta 43](#_e5g0b5v3kxrp)

[Montenegro 46](#_smxdnvbe0mcg)

[Morocco 47](#_elie9nf6hs21)

[Portugal to 2027 49](#_ua1irmela2fp)

[Sweden 51](#_h1pnrxssb8k1)

#

# **Turkey to 2023**

<https://drive.google.com/file/d/1rv5tBhnYvlfkYoWW4HFg9q0bqzT05BL6/view>

Sustainable tourism for leveraging employment rates and regional development + top 5 destination in the world

1. Планування (planning with focus on destination)
2. Інвестиції
3. Управління та інституційна спроможність
4. Внутрішній туризм
5. R&D
6. **Транспорт та інфраструктура**
7. Маркетинг і просування
8. Навчання
9. **Якість туристичних послуг**
10. Брендування міст
11. Диверсифікація туризму (to spread tourism season over the entire year)
12. Реабілітація для перегружених туристичних регіонів
13. Зони розвитку туризму (to use tourism as a key tool for local and regional development in tourism development areas encompassing mote than one cities to be transformed into destinations)
14. Туристичні коридори (to develop a certain route for tourism on definite themes, by rehabilitating historical and nature texture)
15. Туристичні міста
16. Зони для екотуризму

The main issues and challenges facing tourism in Turkey include:
* Addressing seasonality - As a predominantly sun and sea destination, tourism flows and occupancy levels are highly concentrated in the summer season, limiting profitability and the contribution that tourism makes to the economy,
* Enabling the use of tourism as a tool for regional development - while there is great scope for increasing tourism it is currently concentrated in key coastal and city destinations,
* Improving environmental performance - of the tourism industry and by developing new products, ensuring that it is planned and developed sustainably and uses resources wisely,
* Improving the quality of service skills in tourism - with particular regard to education and training of the workforce, and,
* Responding to global unrest and economic crises in nearby countries.

# **Georgia to 2025**

<https://www.worldbank.org/en/news/feature/2015/12/07/a-tourism-strategy-for-georgia-new-path-ahead>

1) the development of a respectful attitude, the regeneration and preservation of the cultural and natural heritage of Georgia

2) the formation of a unique authentic experience of tourists on the basis of familiarization with the objects of this natural and cultural heritage

3) increasing the competitiveness of the industry by providing tourists with world-class services

4) attracting tourists from markets with a higher level of expenses by expanding and increasing the effectiveness of marketing and promotion of tourism services

5) expansion and development in the country of the ability to collect and analyze data on tourism activities and assess the effectiveness of the tourism industry

6) an increase in public and private investment in the tourism sector

7) improving the business environment in order to increase the volume of foreign and domestic investment

8) the formation of partnerships between the government, the tourism industry, non-governmental organizations and the public, necessary to achieve all of the above goals.



* strategic investments in infrastructure, education, marketing, and the development of unique Georgian visitor experiences that appeal to high-value markets around the globe.

# **Bulgaria to 2030**

National Strategy for Sustainable Development of Tourism in the Republic of Bulgaria to 2030 + Action Plan for the period 2017-2020. <https://www.tourism.government.bg/sites/trsm.gateway.bg/archive/en/themes/national-strategy-for-sustainable-development-of-tourism-in-bulgaria-2009-2013-286-0.html>

Ensuring effective coordination between institutions and integrating tourism into related sectoral policies.

The creation of special visa application centres to facilitate travel in co-operation with the Ministry of Foreign Affairs of Bulgaria.

Active co-operation between the Ministry and domestic and international travel trade companies to create joint tourism products and packages.

New product development to diversify the tourism offer, make it more distinctive and tailored to different types of tourists. For instance, the recently elaborated cultural and historic destinations, SPA, wellness destinations and wine and culinary destinations within the country.

Positioning and promotion of Bulgaria as a year-round tourist destination and building a positive image among key international target markets via marketing activity.

Revisions to regulations in order to facilitate the establishment of regional DMOs and other local organisations.

Providing business support and finance for SMEs, capacity building and support to access national and international markets

Developing a unified system for tourist information at a national level, which acts as a networking platform for tourism business (see box).

# **Poland to 2020**

[https://www.msit.gov.pl/en/news/7362,Tourism-Development-Programme-until-2020.html](https://www.msit.gov.pl/en/news/7362%2CTourism-Development-Programme-until-2020.html) (untill 2020) + analysys <https://www.ceeweb.org/wp-content/uploads/2013/02/Final_NTDS-Assessment_Poland.pdf>

The main pillars of the new approach to the development of tourism should be as follows:

* strengthening the competences and quality in the tourism sector,
* improved cooperation in the promotion of Polish tourism’s priority product areas and the exchange of good practices, strengthening the competences and quality in the tourism sector.
* development and use of modern ICT tools for tourism businesses, and the implementation of modern e-service initiatives and projects in tourism,
* development of integrated tourism development networks covering different actors involved in improving the competitiveness of the tourism economy (entrepreneurs, business environment organisations, research entities, financial institutions); this will entail the establishment of stronger inter-sectoral connections of tourism and increase its economic impact.

Other key points:

* creation of legal, institutional, financial and human resources conditions

(should foster social – economic development of tourism and will improve competitiveness of regions and country while preserving its cultural and natural values)

* Developing tourism infrastructure

(infrastructure which helps in protection of locations where the tourist pressure is especially strong).

* Сreation of integrated products

( improving cooperation between areas, service providers, and entities shaping the tourist offer, developing assessment criteria for the integrated branded tourist products from the perspective of the pressure on the environment)

* Development of different type of tourism:
* diversification of tourism activities with the most potential in Poland included rural tourism (under condition that it will preserve original cultural character and natural environment), pilgrim tourism and business tourism.
* Tourism and tourism policy need to be more closely related to the processes of revitalization of cities and urban space development
* Development of human resources contributing to tourism development.

(Role of both tourist staff and the tourists themselves also in creation of high quality tourism as well as proper understanding of products in sustainable tourism is underlined).

* Marketing support

(aims to creation and development of a marketing system in tourism (especially improvement of tourist information system)

#

# **Croatian to 2020**

<https://mint.gov.hr/UserDocsImages/arhiva/Strategy-tourism.present.pdf>

<https://mint.gov.hr/UserDocsImages/arhiva/Tourism_development_strategy_2020.pdf>

10 key directions in Croatian tourism development till 2020:

* Deregulation
* Tourism embracing the entire national territory
* Success through partnership Hotel trade – key initiator of the investment cycle Culture of quality Innovation of the market image
* The ‘Green’ as an operational concept
* Authenticity and creativity
* Beyond the sun and sea
* Croatian products for Croatian tourism

Operational strategies:

1. Marketing

(Restructuring the Head Office of the Croatian National Tourist Board, tourism branding, Public relations, Switching to online communication, lifelong learning of staff)

2. Tourism offer development

1. Development of diversified products with the aim of cutting down seasonality, accelerating privatisation, upgrading accommodation and other elements of the tourism offer)
2. Development of different types of tourism (details - [[p.8](https://mint.gov.hr/UserDocsImages/arhiva/Strategy-tourism.present.pdf)] )

3. Investments

(Renewal and reconstruction of existing hotels, creation of new hotels)

4. Human resources development

(Training centres/ furbishment of specialised technical and business schools, setting up a life‐long learning system)

5. Processes Management

(Proper cooperation between different responsible ministries and government bodies [[p. 10](https://mint.gov.hr/UserDocsImages/arhiva/Strategy-tourism.present.pdf)] )

* World Bank National Development Strategy Croatia 2030: Establish monitoring system to identify types and locations of greatest pressure stemming from tourism activity on the infrastructure, environment and quality of life in general. [[p. 63](https://thedocs.worldbank.org/en/doc/540171604611830912-0080022020/original/21aRoadmapCroatia2030.pdf)].

# **Albania to 2013**

 (+ [2007-2013](https://shtetiweb.org/wp-content/uploads/2014/05/strategy_of_tourism_2007_2013.pdf))

 ensuring the tourist trip chain for accessibility, information and safety will be priority to ensure customer safety and satisfaction.

the sustainable development of the product and the application of the sustainability principle

at all levels,

* the creation of institutional structures, both at central and local level, which would guarantee the implementation of plans and strategic objectives
* the design or the review of urban plans in areas where tourism is a priority, based on

comprehensive economic, social, cultural and environmental analysis,

* the creation of a system in accordance with international standards for the collection and

distribution of statistical data on the evolvement of demand and supply, development of infrastructure elements,

* improvement of informal situations in coastal areas and solutions to the problems created by
* the application of “build and sell” schemes,
* priority given to the development of accommodation structures / facilities with an average capacity of 60 – 70 rooms in the coastal areas and growth as a category,
* clarification of the ownership entitlements, education and training offered to staff (human resources) working in tourism,
* increase of funding and identification of regulatory schemes aiming towards the creation of attractive environment,
* increase of funding for the protection and preservation of naturally and culturally important sites,
* involvement of both private and public sector,
* marketing and promotion of tourism inside the country as well as abroad,
* promotion of best practices,
* investment on various critical human resources to enable the effective development of the tourism sector,
* use of telecommunications and internet as an important and necessary component for the promotion of communication in general and the tourism sector in particular.
* NATIONAL STRATEGY FOR SUSTAINABLE TOURISM DEVELOPMENT 2019 – 2023 [[p. 20](https://turizmi.gov.al/wp-content/uploads/2019/12/National-Tourism-Strategy-2019-2023-EN.pdf).]
* Promotion of Private Strategic Investments and Attraction of Well-known

International Brands in Hotel and Tourism.

* Defining priority areas for tourism development and orienting private

investments towards them.

* Orientation of public investments towards priority areas for the development of

tourism and tourist destinations for improvement of their basic infrastructure.

* Improvement of Tourism Services
* Development of new evaluation models, standardization, certification and

classification of services for tourism and tour operators.

* Establishment of a Regulatory and Institutional Framework for the development

of vocational education and qualifications in tourism, as well as training of human resources engaged in the sector.

* Development of Regulatory and Institutional Framework for the Development

of Services and Operation of Tourism Ports and Activities in their function.

* Consolidation and Development of Tourism Products.
* Development of a Seaside and Maritime Tourism Program and creation of new

products.

* Development of a Natural Tourism Program and creation of new products.
* Development of a Thematic Tourism Program and creation of new products.

(cultural tourism, development of health and business tourism).

* Re-orientation of Promotion towards Tourism Potentials.
* Designing Tourism Brand and Marketing Strategy.
* Promotion of Yearly Tourism Products at home and abroad.
* Supporting the Promotion Agents in the country and in the diaspora

(engage in promoting Albania towards a designated territory outside Albania, followed by

the development of Information Technology as a means of promoting destinations and

informing visitors.)

* Supporting the Management of Destinations.
* Development of a Destination Management model.
* Consolidation of legal and institutional framework for the management and

operation of Destination Management Organizations.

* Monitoring and Supporting Destination Management Organizations

( continuous monitoring, coordination of activities especially with local organizations and donors, as well as the development of various state assistance and help programs to promote and develop them)

#

# **Czech Republic to 2020**

<https://www.oecd-ilibrary.org/sites/aeb88d52-en/index.html?itemId=/content/component/aeb88d52-en#section-d1e26452>

The overall objective of the National Tourism Policy 2014-20 is to increase the competitiveness of the tourism sector at national and regional levels, maintain its economic performance while also achieving a balance between economic, socio-cultural and environmental considerations.

Specific aims of the policy include:

* Building sound institutional structures to effectively implement policy.
* Enhancing the quality of tourism supply, including measures to assist the business environment.
* Improving workforce skills.
* Improving access to tourism markets by service providers.
* Strengthening the role of tourism in other economic and sectoral policies.

***Continued implementation of the Czech Service Quality System***. This innovative system of certification is primarily aimed at tourism SMEs, to support businesses to improve the quality of their services and gain further expertise. It is undertaken by the Ministry, in co-operation with CzechTourism and different tourism stakeholders.

***Implementation of a project on tourism statistics***, aimed at improving and expanding statistical data concerning inbound tourism to the Czech Republic. This project includes an inbound tourism survey using mobile derived big data and consists of analysing residual data of mobile operators and thus improving data collection relating to the Czech Republic’s Tourism Satellite Account. It is undertaken by the Ministry in co-operation with the Czech Statistical Office, with results expected in early 2020.

***Implementation of the National Support Programme for Tourism in Regions 2017-20***, and its sub-programmes: development of basic and supporting tourism facilities, and marketing activities in tourism.

* Sustainable tourism <https://www.ceeweb.org/wp-content/uploads/2012/02/Assessment_CZ_20131.pdf>

# **Slovak Republic to 2020**

OECD review: <https://www.oecd-ilibrary.org/sites/9fd7108d-en/index.html?itemId=/content/component/9fd7108d-en#section-d1e85706>

(Manifesto of the Government of the Slovak Republic for 2016-20)

The Government’s main tourism policy aims, as set out in the Manifesto of the Government of the Slovak Republic for 2016-20, are to increase the competitiveness of the sector while creating new jobs across the country. To achieve these goals, it has recognised the need to:

* Consider more flexible forms of employment given the seasonal nature of tourism.
* Improve coordination between the rail and bus sectors, and the operators of tourism resorts.
* Present the country as an attractive and safe destination, to encourage visitors and longer stays.
* Encourage destination management through DMOs which in turn actively represent Slovakia.
* Strengthen the development of higher value added, cost-effective tourism products.
* Place more emphasis on support for the development of the spa industry.
* In addition to the Manifesto, Slovakia’s tourism priorities are set out in two other main policy documents:

***Tourism Development Strategy until 2020***, which aims to increase the competitiveness of the tourism sector, balance regional disparities, and create jobs with a focus on two key areas - raising the quality of the tourism offer and promoting Slovakia as a tourism destination.

***Tourism Marketing Strategy 2019-20***, which seeks to maximise the economic benefits of tourism by: increasing the volumes and length of stay of both domestic and inbound tourism, and aid efficient utilisation of accommodation capacity; strengthening Slovakia’s brand positioning as an attractive tourist destination offering a competitive product; and using major events to raise the awareness of Slovakia’s tourism offer.

The priorities and challenges identified in the strategic documents have been addressed by various policy initiatives, including:

* Implementing a destination management approach for tourism development through the Tourism Support Act, which regulates tourism support, including local and regional tourism organisations that receive co-funding support from the state budget for various activities.
* Developing and approving legislation, including to provide subsidies to support the development of cycle tourism in Slovakia, and enact the EU Directive on Package Travel.
* Supporting the development of innovative products, including through funding support provided by the Ministry to local and regional tourism organisations. Recent examples include tourist navigation systems, digital tourist information panels, tourist cards, cyclo-applications, geo-location applications, e-bike products and digital geographic information systems.
* Supporting domestic tourism participation through the implementation of the recreation vouchers initiative (see box).
* Reducing the VAT on accommodation services to 10%, compared to a national rate of 20%.
* Signing a co-operation agreement between the Ministry and the Statistical Office to improve statistics relating to inbound tourism and establish a Tourism Satellite Account.
* Co-operating with the Visegrad Four Group under the common Discover Central Europe brand, which aims to increase joint marketing and promotional activities in overseas markets and to increase visitor numbers from long-haul markets to the ‘V4’ countries - the Czech Republic, Hungary, Poland and Slovakia.

#

# **Hungary to 2030**

OECD review: <https://www.oecd-ilibrary.org/sites/6b3a24f7-en/index.html?itemId=/content/component/6b3a24f7-en#section-d1e44564>

([The National Tourism Development Strategy 2030](https://mtu.gov.hu/documents/prod/mtu_strategia_2030-english.pdf))

The National Tourism Development Strategy 2030 defines the short, medium and long term goals for the sector, and the tasks to achieve these, it identifies key intervention points, establishes delivery measures, and allocates resources. The Strategy also provides a framework where public and private actors can develop a common vision for the future of tourism in Hungary.

The emphasis of the Strategy is a co-ordinated approach to destination-led development. Destinations are encouraged to develop the entire visitor experience, while drawing on support from the Hungarian Tourism Agency for development, branding and marketing expertise. Related infrastructure and facilities are also considered in context of the wider destination plan, which is designed to provide internationally competitive tourism products and services across the country.

The following principles underpin delivery of the Strategy:

* Tourism developed in balance with local communities and the natural environment.
* An emphasis on family-friendly tourism facilities and experiences.
* A focus on accessible tourism, particularly for visitors with disabilities.
* A clear offer and comprehensive guidance for visitors, including multi-lingual information, signage etc.
* The creative and innovative use of technology through ***digital applications and support to businesses\* !!!! (***[***Creation of the National Tourism Data Supply Centre in Hungary***](https://www.oecd-ilibrary.org/sites/6b3a24f7-en/index.html?itemId=/content/component/6b3a24f7-en#section-d1e44564)***).***

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# **Romania to 2030**

OECD review: <https://www.oecd-ilibrary.org/sites/721999bd-en/index.html?itemId=/content/component/721999bd-en#section-d1e135055>

(National Tourism Development Strategy)

[Romania - Functional Review : Regional Development and Tourism](https://openknowledge.worldbank.org/handle/10986/12294?locale-attribute=fr)

The 2018 National Tourism Development Strategy was developed with the support of the World Bank, and is built upon previous related documents, such as the National Tourism Development Master Plan for Romania 2007-26, which was developed in collaboration with the UN World Tourism Organization.

The vision of the National Tourism Development Strategy is for Romania to be a well-known premier, year-round tourism destination by 2030, focussed on unique cultural and natural heritage, and world-class customer service. The Strategy is based on four operational objectives:

* Improve the connectivity and quality of tourist infrastructure,
* Support the private sector innovation,
* Enhance the quality of visitor experiences and services at destinations,
* Strengthen tourism policy-making capacity, increase digitalisation and better align marketing mechanisms and campaigns.

Two key priorities are identified in the National Tourism Development Strategy:

* Better capturing visitor spending at tourism sites which are insufficiently developed and difficult to access, and improve the consistency and quality of the visitor experience and service across destinations.
* Attract higher-value tourists to the country through stronger tourism policies, improved market segmentation and greater visibility of the country in international markets.

Another policy document, the Master Plan for Tourism Investments, takes account of the two sectoral strategies; the National Strategy for Ecotourism Development and the Master Plan for the Development of Balneary Tourism.

# **Greece to 2020**

Marketing Strategy Greek National Tourism Organisation (GNTO)

<https://www.thr.es/en/tourism-marketing-plan-of-greece#.YbhplWhBxPY>



OECD review: <https://www.oecd-ilibrary.org/sites/6b47b985-en/1/3/4/12/index.html?itemId=/content/publication/6b47b985-en&_csp_=a806bfa96e09b9351b58695070b6c960&itemIGO=oecd&itemContentType=book>

The Greek National Tourism Organisation’s Tourism Marketing Plan 2019-20 distinguishes the competitive advantages of each of the 13 Regions, and proposes a range of dynamic packages combining well known destinations with new, emerging destinations, offering travellers a variety of choices throughout the year.

Greece’s tourism strategy aims to promote the country as a global and attractive year round destination offering unique and authentic travel experiences. Tourism is at the centre of Government policy for national development, innovation and openness.

The main priorities for national tourism policy are to improve the competitiveness, quality, authenticity, resilience and sustainability of the tourism product, and to boost investment in high quality accommodation and other tourism developments with a low environmental footprint. It also takes into consideration the UN Sustainable Development Goals.

The five axes of the National Tourism Strategic Plan are as follows:

* High-standards of infrastructure, with improvements to the licensing regime in order to attract high-quality investments, eliminate red tape and optimise the spatial distribution of tourism
* Respect for sustainability principles.
* Improved accessibility and connectivity, by enhancing the country's aviation route network and by expanding and upgrading the national network of marinas.
* Better management of the tourism experience, to increase quality and attractiveness via a focus on sustainable destination management and tourism education.
* Redesign of the tourism product, and redefinition of the brand and communications to reflect the focus on quality, authenticity, resilience, sustainability and value for money.

ther policy initiatives currently being developed include a range of cross-cutting activities with other ministries and the private sector such as:

* A major public-private sector collaboration to stimulate the development of maritime tourism by improving and enhancing the national network of tourist ports.
* Implementation of practical traineeships in the tourism sector for students in post-secondary education and the operation of vocational training programmes to boost skills and employability.
* Improvements to tourist guides’ education and licensing.
* A new Inter-Ministerial Working Group to improve co-operation and co-ordination between the Ministry of Tourism and the Ministry of Culture and Sports on issues of common interest.
* A partnership with the Hellenic Statistical Authority to improve inbound tourism statistics and other data on occupancy, industry structure.

 + Silk road digital marketing plan <https://webunwto.s3-eu-west-1.amazonaws.com/imported_images/49581/gnto-presentation_on_the_silk_roads_0.pdf>

#

# **Estonia to 2020**

OECD review: <https://www.oecd-ilibrary.org/sites/6b47b985-en/1/3/4/8/index.html?itemId=/content/publication/6b47b985-en&_csp_=a806bfa96e09b9351b58695070b6c960&itemIGO=oecd&itemContentType=book>

2020 program <https://www.mkm.ee/en/objectives-activities/construction-and-housing-sector/tourism>

The key objectives of the previous program were:

* To increase the international competitiveness of Estonian tourism and
* To ensure sustainable economic growth by developing tourism services and domestic tourism.

For that purpose, all market participants in the tourism sector will have to:

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

The new Tourism Programme 2021-24 will include an agreed longer term vision. (Not yet publicly available) The four year period will make it more flexible and adaptable as and when there is a need to react to market trends and other developments. Some of the policy priorities for the future strategy are likely to include:

* Supporting the development of new business models for tourism SMEs, focusing on adding value through business competitiveness and extending tourism growth across the regions.
* Increasing the uptake of digital technologies, solutions and competences to support innovation and create a competitive edge, with activity particularly directed towards SMEs.
* Promoting effective data management for both businesses and public authorities.
* Strengthening destinations, and destination management organisations, to support the conservation and creation of a valuable and attractive environment, and to underpin activity with sustainable development principles.
* Improving the diversity of the offer, to increase the attractiveness to international visitors of destinations beyond Tallinn, by creating quality products and services across the country.
* Securing better direct flight connections to Estonia, improving connectivity and diversifying markets away from a current over-reliance on Finland and Russia.
* Continuing to focus on development of the meeting, incentive, conference and events (MICE) sector, including likely investment of a major conference centre in Tallinn via the regeneration of an existing concert hall.
* Simplifying regulations connected to the accommodation sector and reducing the reporting requirements for businesses. The policy objective is to have similar requirements for both traditional accommodation providers and those operating in the sharing economy.

The new Programme will have direct links to the Estonia 2035 strategy, the new 2030 Transport and Mobility Strategy, and a number of other key future policies, including rural development and culture. As the tourism sector is so interlinked with other policy areas, it remains a government objective to co-operate between different ministries and secure a fully co-ordinated policy response. Private sector stakeholders are regularly consulted in this policy planning process.

#

# **France**

([2015](https://www.gouvernement.fr/en/a-tourism-development-strategy)) + current <https://www.diplomatie.gouv.fr/en/french-foreign-policy/tourism/the-action-of-maedi-in-promoting/improving-france-s-appeal-and-outreach/>

OECD review: <https://www.oecd-ilibrary.org/sites/6b47b985-en/1/3/4/10/index.html?itemId=/content/publication/6b47b985-en&_csp_=a806bfa96e09b9351b58695070b6c960&itemIGO=oecd&itemContentType=book>

Of the 40 proposals in the Council's report, Laurent Fabius - the former head of Conseil de Promotion du Tourisme (Tourism Promotion Council)incumbent President of the Constitutional Council - has initially selected twenty or so, which include the following:

* Improving reception facilities, which must become a national priority, whilst ensuring good travel preparation (facilitating the acquisition of visas, enriching the tourist content of the global media) and that everything runs smoothly.
* Adopting a coherent promotion strategy based on a limited number of world-famous destination brands to focus both efforts and financial resources.
* Developing digital technologies: overhaul of the tourist promotion portal, high-speed broadband coverage in the main tourist areas, adoption of an electronic “citypass” in the Ile-de-France region and clarification of contractual relations between traditional players in the tourist sector and professionals in the digital sphere. The adoption of two significant measures by the National Assembly on Wednesday 10 June reflects this: creation of a mandate agreement between hoteliers and major booking centres, and the withdrawal of the pricing parity clause.
* Promoting occupations in the tourism industry and improving training for professionals, placing the emphasis on foreign language skills, service quality, digital expertise and general culture. The creation of a conference of establishments of excellence is essential to improving the visibility of training programmes. The creation of a research chair devoted to tourism should help better unite the academic and professional spheres within the sector. Online training will be developed.
* The introduction of a tourism investment strategy with the creation of a special investment fund (Tourism Investment Fund). This will be created in the autumn and the third future investment programme will include a special tourism component, available to businesses as of 2016. Bpifrance has also introduced a funding service for professionals in the tourism industry.
* Support for initiatives showcasing regional and product diversity. The “European Heritage Days” will henceforth incorporate intangible heritage, gastronomy in particular. Owing to the success of its first edition, the “Goût de France” (Taste of France) initiative will be repeated in 2016. A “ranking of gastronomic rankings” will be launched in the autumn to introduce greater transparency in international rankings.

During the 2017 Inter-ministerial Tourism Council meeting (CIT), the roadmap for tourism development was set and the Government agreed to focus action on six key areas:

* Welcome and security - improvements in service standards have been achieved in particular through reduced visa waiting times and border crossing times at airports, while quality-related efforts are focused on modernising and promoting the Government’s Tourism Quality label (Qualité TourismeTM).
* Dispersal - in order to attract and disperse international tourists across France, including its overseas territories. Key elements include the destination contracts policy, which brings together all parties involved in delivering a local tourist offer.
* State support for investment - a major pillar of the Government’s strategy for improving the quality of the tourist offer and promoting better connectivity. This is achieved through deployment of the France Tourism Development Fund (France développement tourisme).
* Training and employment - crucial in terms of service quality and playing a major role in combating unemployment given the number of jobs created by the industry.
* Supporting digitalisation and information – specifically to increase the global competitiveness of France’s tourism industry. Key elements include development of the DATAtourisme portal, France NUMerique (box 2.8), Tourisme Lab incubator network and economic intelligence observatory, Veille Info Tourisme.
* Broader access to holidays - in particular for people living with a disability, represents a social objective and a way to enhance the competitiveness of destinations;

To reach this objective, the City of Paris, in partnership with stakeholders in the Parisian tourism sector that form the "Paris Destination Committee", defined an ambitious tourism development strategy for 2022, focused on 4 areas:

* Offer Unique experiences

(The only city in the world capable of providing a varied, unique tourism offering, revealing new places and experiences to be discovered, and enabling each visitor to create a customized stay.

* share A welcoming city

(A welcoming city that is open to the world, takes care of its visitors throughout their stay, and offers a smooth visitor experience adapted to individual needs, in which the residents are involved in the tourism experience)

* Develop Sustainable tourism

(A harmonious city,thanks to its solidarity-based,sustainable tourism development model that respects its environment and residents.

* reinforce A successful destination

(A city that provides the means required for achieving its tourism ambition and the support and necessary tools for boosting the sector’s growth).

#

# **Ireland to 2025**

<https://assets.gov.ie/15792/8b462712683748e7bcec6c7d5c7ecd2a.pdf>

OECD review: <https://www.oecd-ilibrary.org/sites/6b47b985-en/1/3/4/15/index.html?itemId=/content/publication/6b47b985-en&_csp_=a806bfa96e09b9351b58695070b6c960&itemIGO=oecd&itemContentType=book>

Tourism is one of Ireland’s most important economic sectors and has significant potential to play a further role in Ireland’s economic renewal

The focus of tourism policy must therefore be to maximise the export contribution of tourism, while protecting the invaluable assets that are our natural, built and cultural heritage. This involves a change of focus from overseas visitor numbers to overseas visitor revenue.

Policy objectives:

1.1 Marketing Ireland as a visitor destination

1.2 Protecting key tourism assets

1.3 Supporting investment in the visitor experience

2.1 A changing approach to human resources and training in

tourism

3.1 The regulatory structure for visitor accomodation

4.1 Local Authorities supporting communities in tourism

5.1 Fiscal and Enterprise Policies and Actions

5.2 Improve access to and withinIreland

6.1 international activity to support tourism

7.2 Tourism’s contribution to cross-border co-operation

#

# **Italy to 2022**

The plan itself: <https://www.beniculturali.it/mibac/multimedia/MiBAC/documents/1482320029441_PST_2017_ENG.pdf>

Strategy outline: <https://www.slideshare.net/TurismoMiBACT/piano-strategico-del-turismo-20172022-executive-summary-eng>

OECD review: <https://www.oecd-ilibrary.org/sites/6b47b985-en/1/3/4/17/index.html?itemId=/content/publication/6b47b985-en&_csp_=a806bfa96e09b9351b58695070b6c960&itemIGO=oecd&itemContentType=book>

The current policy framework is the National Strategic Plan for Tourism 2017-2022, which is based around four themes:

* Culture and heritage: cultural and natural heritage should be enhanced through sustainable management practices and the innovative use of assets.
* Competitiveness and employment: tourism competitiveness should be boosted to generate added value and increase the quantity and quality of employment.
* Putting the tourist at the centre: the Italian tourism experience should respond to the demands and expectations of the market.
* Integration and interoperability: the system of tourism associations and operators should be fully integrated, encouraging interoperability and partnership working.

Three strategic principles cut across all of the Plan's targets and measures:

* Sustainability: a key element of competitiveness in tourism, which must conserve natural resources and landscapes and attract investment for their protection. A sustainable vision for tourism is geared towards sharing opportunities throughout the country and throughout the year, and bringing employment to new as well as established destinations.
* Innovation: in relation to tourist destinations, business models, professional profiles, marketing, and the quality of services and products. Digitalisation is at the forefront of innovation, relating to the distribution of information, decision making by travellers and the expansion of information tools,
* Accessibility: includes widening access to less-visited areas and giving all types of visitor the chance to benefit from tourism and fully appreciate the uniqueness of the destinations visited.

#

# **Latvia to 2023**

OECD review: <https://www.oecd-ilibrary.org/sites/6b47b985-en/1/3/4/20/index.html?itemId=/content/publication/6b47b985-en&_csp_=a806bfa96e09b9351b58695070b6c960&itemIGO=oecd&itemContentType=book>

Creation of export-oriented tourism products by taking advantage of the unique nature and the cultural and historical heritage of the regions, the infrastructure in place in the regions and the potential of resort services [[p. 24](https://www.pkc.gov.lv/sites/default/files/inline-files/NDP2020%20English%20Final___1.pdf)]

Developing the required infrastructure of Riga for the performance of the functions of a regional metropolis (including in tourism, culture, science and raising of investment [[p. 60](https://www.pkc.gov.lv/sites/default/files/inline-files/NDP2020%20English%20Final___1.pdf)]

Development of an integrated selection of export oriented tourism, cultural, health and natural capital infrastructure products and services [[p. 65](https://www.pkc.gov.lv/sites/default/files/inline-files/NDP2020%20English%20Final___1.pdf)].

Medical Tourism Development in high priority!

#

# **Lithuania to 2031**

OECD review: <https://www.oecd-ilibrary.org/sites/6b47b985-en/1/3/4/21/index.html?itemId=/content/publication/6b47b985-en&_csp_=a806bfa96e09b9351b58695070b6c960&itemIGO=oecd&itemContentType=book>

A new long term Strategy for Tourism to cover the period from 2021-2031 is now in development, and will aim to tackle and prioritise key forward-looking issues, namely:

* Developing public and private tourism infrastructure.
* Creating and developing attractive tourism routes.
* Improving Lithuania’s accessibility.
* Increasing qualifications and improving entrepreneurial skills.
* Developing certification and accreditation schemes for services providers.
* Developing the information database holding details of Lithuania’s tourism product.
* Co-operating with neighbouring countries to implement joint marketing activity.
* Creating tourism clusters to deliver joint public and private tourism marketing projects.
* Increasing the supply of shoulder and off-season cultural events and attractions.

Growing innovation, rapid modernisation and many emerging challenges for the development of tourism require highly qualified workforce. To this end, further investment is prioritised to develop the required skills, including improved language, sales and marketing skills, professionalism and intercultural competence.

#

# **Mexico to 2024**

OECD review:

<https://www.oecd-ilibrary.org/sites/6b47b985-en/1/3/4/23/index.html?itemId=/content/publication/6b47b985-en&_csp_=a806bfa96e09b9351b58695070b6c960&itemIGO=oecd&itemContentType=book>

The Government’s overall priority is to consolidate Mexico as a globally important tourism destination, where the sustainable use of cultural and natural heritage enables equitable development amongst individuals, communities and regions. The Tourism Sector Programme 2019-24 will involve a new social approach, inclusive and diverse, that will promote constitutional rights to rest and recreation:

* Use tourism to promote a social approach and respect for human rights.
* Promote the balanced development of tourist destinations, by developing new tourism development projects, formation of tourist attraction clusters, alongside the devolution of functions and powers to regions from the Ministry of Tourism.
* Strengthen the diversification of tourism markets nationally and internationally, by innovating its promotion and marketing mechanisms through the Visitmexico digital platform. In addition public policies between different agencies will be strengthened; for example joint efforts with the Ministry of Foreign Affairs relating to improving the image of Mexico abroad.
* Promote sustainable tourism, to move to consolidate as a green destination.

Priority programmes include:

* Enjoy Mexico. The programme will aim to strengthen the national market and guarantee the right of all Mexicans to appreciate and enjoy their heritage. It will establish agreements with tour operators and national strategic partners to offer low-cost tour packages. Tourism flows will be reoriented to emerging and developing destinations while also improving seasonality in low and shoulder seasons.
* Smiles for Mexico. This programme will ensure that tourism is accessible for all, with attention to the most vulnerable segments of the population.
* Mayan train. A high impact project and the largest investment in the sector in recent years (see box).
* Comprehensive Tourism Development Project of Huasteca Potosina. Within the framework of the presidential announcement for the construction of the new Huasteca Potosina airport, the Comprehensive Tourism Development Project will be a model of nature tourism that will become a national and international benchmark.
* Anchor Tourist Products. In order to strengthen the regional approach, “anchor” products will be developed to improve and revitalise the current offer and promote the integration of specialised tourist routes, in co-ordination with state, municipal governments and the private sector.
* Operation Touch Doors. This Programme is focused on diversifying markets and positioning Mexico as a reference destination for international markets, especially in niches with high purchasing power such as the United States, United Kingdom and France.
* Reunion with my roots. A Programme to attract the Mexican diaspora in North America, to increase the number of trips and the spending of the Mexican - American population.
* Sustainable Mexico Reborn. The objective of this programme is to position Mexico as an international benchmark of good practice, through the creation of a new generation of sustainable tourist routes.

#

# **Netherlands to 2030**

OECD review:

<https://www.oecd-ilibrary.org/sites/6b47b985-en/1/3/4/24/index.html?itemId=/content/publication/6b47b985-en&_csp_=a806bfa96e09b9351b58695070b6c960&itemIGO=oecd&itemContentType=book#section-d1e69851>

Netherlands Board of Tourism and Conventions (NBTC) Holland Marketing: Perspective 2030^ <https://www.nbtc.nl/en/site/destination-netherlands/perspective-destination-netherlands-2030.htm>

Five priorities play a key role in achieving this ambition:

* Benefits and burdens are in balance, more benefits from tourism than burdens;
* All of the Netherlands is attractive: put more cities and regions on the map as attractive destinations;
* Accessible and achievable: easily accessible cities and regions;
* Sustainability is a must: a living environment with less waste and pollution;
* A hospitable industry: the Netherlands as a welcoming destination.
* “HollandCity Strategy”, which seeks to spreading visitors in time and space.

(Significant and continuing growth of tourism has shown a downside to the country’s popularity)

Therefore Government also aims to:

* Facilitate co-operation between regions.
* Improve data and build knowledge of the sector.
* Encourage the development of destination management.

Future policy responses by the Netherlands Government target three main trends and goals, each of which has specific targets:

* Growing tourism: the target is to spread tourism in time and space, and shift objectives from promotion and marketing towards destination management.
* Increasing co-operation between different layers of government: this will be enhanced by promoting provincial and regional synergies, and by formulating an action programme based on the strategic pillars of Perspective 2030.
* Increasing co-operation within the tourism sector: other core targets include positioning different attractive destinations, accessibility, sustainable tourism, and improving visitor experiences.

#

# **Norway**

OECD review:

<https://www.oecd-ilibrary.org/sites/6b47b985-en/1/3/4/26/index.html?itemId=/content/publication/6b47b985-en&_csp_=a806bfa96e09b9351b58695070b6c960&itemIGO=oecd&itemContentType=book>

National Tourism Strategy 2030

<https://assets.simpleviewcms.com/simpleview/image/upload/v1/clients/norway/Nasjonal_Reiselivsstrategi_engelsk_red_c59e62a4-6fd0-4a2e-aea1-5e1c6586ebc6.pdf>

In 2017, the Norwegian Government and Parliament established the following national policy priorities for developing Norwegian tourism:

* establishing sound framework conditions for business activity,
* developing a sustainable tourism industry
* increasing co-operation between stakeholders,
* continuing to promote Norway as a tourism destination,
* increasing knowledge and expertise in the tourism industry
* improving accessibility to boost competitiveness.

The Government has also previously developed a tourism strategy based on agricultural resources (2017), which is now being implemented, focusing on Norway as a destination with *unique food experiences.*

In 2019, a key policy development was the launch of the *cultural tourism* strategy. The work was led jointly by the Ministry of Culture and the Ministry of Trade, Industry and Fisheries with input from many other interest groups. Priority policy areas:

* strengthening Co-operation among culture and tourism stakeholders,
* addressing a need for more knowledge of cultural tourism,
* developing and adapting cultural tourism products to make Norway more attractive as a destination throughout the year,
* increasing promotion of the cultural offer to strengthen Norway as a destination.

Cruise tourism - negative impact of cruise traffic on the local environment and local communities. In order to respond:

* Stricter regulations on emissions from ships sailing in the Norwegian world heritage fjords from March 2019.
* A new Harbour and Fairways Act, effective from 2020, will grant local authorities wider powers to limit cruise ships and other vessels' stay ashore or in port, in order to reduce emissions and improve air quality.
* An increasing number of Norwegian ports are investing in new infrastructure to be able to offer visiting cruise vessels on-shore power supply (from hydropower). This will enable the vessels to turn off their diesel engines and so reduce emissions. The Norwegian Government’s enterprise responsible for promoting environmentally friendly energy solutions (Enova) has granted financial support to investments in 20 ports.
* The Government also launched a new Action Plan for Green Shipping in 2019, outlining policies and measures to reduce national emissions of greenhouse gases, strengthen the Norwegian maritime industry and enable the development of the technology needed to reach global environmental goals.

#

# **Spain**

OECD review:

<https://www.oecd-ilibrary.org/sites/6b47b985-en/1/3/4/31/index.html?itemId=/content/publication/6b47b985-en&_csp_=a806bfa96e09b9351b58695070b6c960&itemIGO=oecd&itemContentType=book>

Strategy of Sustainable Tourism for 2030 <https://turismo.gob.es/en-us/estrategia-turismo-sostenible/Paginas/Index.aspx>

The Tourism at Destination Strategy responds to two general aims.

1. To support Spanish tourist destinations, whatever their scale and type of demand they respond to, in a transformation process that leads them to become hubs of tourism innovation, able to integrate environmental, socio-economic and territorial sustainability in their offer and to develop resilience strategies to the new challenges of the tourism ecosystem, from climate change to the over-demand of tourism and health and safety crises.
2. To achieve greater territorial cohesion, not just relating the offer and destinations in each region, but creating connections between the destinations in different regions. In this regard, the Sustainability Strategy seeks balanced development of the tourism potential through the country while seeking to bed down ties of solidarity in communities such that they contribute to solving common problems.

The strategy proposes a tourist growth model for the coming years based on the following principles:

* Socio-economic growth that should work for competitiveness and profitability of the sector, quality and accelerating the digital transformation process.
* Preservation of natural and cultural values, on the basis that the conservation of our extensive cultural and natural heritage is a priority.
* Social benefit, to achieve a sharing of benefits of the sector and challenges such as rural depopulation in spain.
* Participation and governance support, participatory governance mechanisms between the state and the competent administrations at all levels.
* Permanent adaptation since this is not only search quality and improvement, but also enable the sector to have capacity to respond to the new environment of constant changes.
* Leadership, which aims to consolidate the role of Spain as a world leader in the sector.

Strategic axes

Set the objective and the foundations of the Pattern defines the five strategic axes of the new government Agenda for the tourist sector.

1. Collaborative governance.
2. Sustainable growth.
3. Competitive transformation.
4. Tourist space, companies and individuals.
5. Product, marketing and tourist intelligence.

#

# **Uruguay**

NATIONAL PLAN OF SUSTAINABLE TOURISM 2030 <https://www.comprasestatales.gub.uy/Pliegos/pedido_728133.pdf>

Uruguay, a country aligned with the values of sustainable development which offers its citizens and visitors: nature, heritage, culture, quality of life, democracy, security, respect for diversity, social inclusion and universal accessibility, within the framework of a society with human warmth. A country with a dynamic, qualified and creative tourism sector consolidated by its governance and using cutting edge technologies.

In order to build this desirable vision of the future, the objectives to be fulfilled are structured in three axes aiming at the thematic concentration and effectiveness in the execution for its clear application in the territory:

Axis 1: PLANNING, TERRITORIAL MANAGEMENT AND DIVERSIFICATION OF THE TOURIST OFFER

* Plan and manage tourism at a territorial level in a regional and local manner with the participation of different stakeholders.
* Contribute to the environmental, economic, socio-cultural sustainability of the activity.
* Promote tourism investment through incentives under H2030 terms.
* Raise awareness about the importance of designing the tourist offer.

Axis 2: EMPLOYMENT, ENTREPRENEURSHIP, TRAINING AND SOCIAL INCLUSION

* Promote the improvement of tourism employment in quantity and quality.
* Implement varied tools to access the market of new entrepreneurs related to the needs of destinations and regions.
* Respond to the training needs of the entire country (employees and employers) through the operation of the National Tourism Education System, taking into account changes made in the activity.
* Generate conditions for tourism to be accessible to all citizens.
* Continue raising social awareness regarding the repudiation of the sexual exploitation of children and adolescents.

Axis 3: MARKETING, PROMOTION AND COMMUNICATION

* Collect, produce, evaluate and systematically disseminate tourist information at a national and local level.
* Permanently update the use of new technologies.
* Deepen the promotion of domestic tourism and regional agreements for international promotion.
* Regularly follow up promotion and marketing plans.
* Create a joint work plan with those adhering to the Country Brand (Marca País, in Spanish) regarding international insertion.
* This strategic plan intends to be a contribution based on a challenging reality, looking ahead, laying bridges and working to build a better future from one of the most powerful activities for our territory

#

# **Cyprus**

National Tourism Strategy 2030: [https://www.tourism.gov.cy/tourism/tourism.nsf/All/BAD4CBEFDCC897B5C225850D0028487B/$file/Cyprus%20Tourism%20Strategy%202030%20-%20Foreword\_En.pdf?OpenElement](https://www.tourism.gov.cy/tourism/tourism.nsf/All/BAD4CBEFDCC897B5C225850D0028487B/%24file/Cyprus%20Tourism%20Strategy%202030%20-%20Foreword_En.pdf?OpenElement)

The strategic focus of our vision is to establish Cyprus as:

a) a year-round destination b) a quality destination c) a digitally smart destination d) a place where all residents can benefit from tourism. Some examples of initiatives that we aspire to undertake are:

* ***Establishing Cyprus as a year-round destination:***
* rebranding Cyprus internationally, as a destination which offers more than sun and sea
* improving airline connectivity to the island, to diversify our source nationalities and markets

***Establishing Cyprus as a quality destination***

* supporting investments in special-interest products
* improving our price competitiveness and value for money e.g. by modernizing legislation related to services like restaurants, taxis, rental vehicles, theme parks etc.

***Establishing Cyprus as a digitally smart destination***

* benchmarking our tourism services versus competing destinations, by leveraging data from online reputation management platforms
* encouraging repeat visits to the destination e.g. through a loyalty scheme which rewards payments at a variety of attractions and transport mobility services

***Establishing Cyprus as a place where all residents can benefit from tourism***

* spreading tourism revenue across all regions of Cyprus e.g. by promoting the authenticity of our rural and mountainous areas
* spreading tourism wealth to other sectors of the economy e.g. by linking authentic gastronomy with agriculture

#

# **Dominican Republic**

Central American Bank for Economic Integration:

2015-2019 Dominican Republic country strategy: <https://www.bcie.org/fileadmin/bcie/english/files/news-and-media/publications/strategies/Strategy_DominicanRepub_VFinal_WEB.pdf>

improving productive and energy infrastructure, focusing on the country’s commercial and tourism integration

COMPREHENSIVE TOURISM AND URBAN DEVELOPMENT PROGRAM FOR THE COLONIAL CITY OF SANTO DOMINGO: <https://ewsdata.rightsindevelopment.org/files/documents/84/IADB-DR-L1084_PwLrzBA.pdf>

The principal objective of the program is to revitalize the urban, economic, and cultural tourism aspects of the Colonial City of Santo Domingo (CCSD) by:

(i) restoring public spaces and historical monuments,

(ii) improving habitability for residents,

(iii) developing local economies

(iv) strengthening the management of the CCSD.

#

# **Finland**

OECD review: <https://www.oecd-ilibrary.org/sites/6b47b985-en/1/3/4/9/index.html?itemId=/content/publication/6b47b985-en&_csp_=a806bfa96e09b9351b58695070b6c960&itemIGO=oecd&itemContentType=book>
Tourism Strategy 2019-28: <https://tem.fi/en/finland-tourism-strategy>

Action Plan 2019-23: <https://julkaisut.valtioneuvosto.fi/handle/10024/162136>

Recognised trends affecting inbound tourism are:

* sustainability and its impact on tourism and travel behaviour
* digitalisation,
* new potential tourist markets
* increased international interest in some of Finland’s key strengths: nature, security, cleanliness and authenticity.

A major challenge faced by tourism in Finland is its price competitiveness, with high taxes and labour costs as contributing factors.

Other challenges include seasonality, difficulties in finding skilled workers, connectivity issues and relatively few travel businesses to support tourism growth.

Under the new Tourism Strategy 2019-28 and Action Plan 2019-23, ***four*** key priorities to promote growth and renewal in the sector are:

* support activities that foster sustainable development
* respond to digital change,
* improve accessibility
* ensure an operating environment that supports competitiveness.
* Co-operation with relevant stakeholders also plays a major role.
* seeks to develop new market opportunities, such as nature tourism.

#

# **Germany**

OECD review: <https://www.oecd-ilibrary.org/sites/6b47b985-en/1/3/4/11/index.html?itemId=/content/publication/6b47b985-en&_csp_=a806bfa96e09b9351b58695070b6c960&itemIGO=oecd&itemContentType=book>
The 2019 National Tourism Strategy: <https://www.bmwi.de/Redaktion/EN/Dossier/tourism.html>

The national tourism strategy is oriented to three overarching policy goals: Firstly, domestic value added is to be increased, thus fostering economic growth. Secondly, the quality of life of the people living in Germany is to be improved on a lasting basis. Thirdly, tourism is to foster international stability.

Other tourism policy priorities include:

* Accessibility - making services and information available for people with reduced mobility and families with small children.
* Strengthening rural tourism - rural regions account for 60% of Germany’s territory and 32% of holiday accommodation capacity, but only 12% of tourism value added.
* Labour and skills - competition for skilled professionals has intensified across the entire economy and is impacting the development of tourism. Many tourism firms are registering declining numbers of trainees, comparatively high training drop-out rates and high staff turnover.
* Digitalisation - an increasingly important issue, where smaller businesses in particular are struggling to keep up. The digital transformation of tourism, or Tourism 4.0, is included as a key priority for the Federal Government in its National Tourism strategy.
* Influx from new source markets - management of congestion caused by increase in visitors.
* Economic, social and environmental sustainability.

The 2019 National Tourism Strategy aims to strengthen tourism in the economy and to prepare the entire sector for the future. The Strategy has three overarching policy goals: to raise domestic value creation, to improve the quality of life for the people living in Germany, and to play a part in helping to ensure global stability. In order to achieve these goals, the Federal Government has worked closely with partners from business and government to develop a set of six strategic goals for tourism policy:

* Exploit the many different areas of economic potential in tourism, including creation of employment opportunities in rural areas.
* Strengthen the competitiveness of Germany as a tourism destination, and bolster the tourism industry which is largely made up of SMEs, providing it with the room it needs to develop.
* Create modern, accessible, reliable and sustainable digital infrastructure that takes account of tourists’ needs, and of the challenges associated with an increase in visitor numbers.
* Seek to develop quality tourism that preserves valuable natural and cultural habitats, contributes to providing a high quality of life for visitors and local residents, and creates a positive image of Germany abroad.
* Utilise the potential of tourism to boost economic development in other parts of the world, and to foster peace, tolerance and international understanding,
* Support tourism development that is environmentally and climate friendly.

Through a dialogue process led by the Federal Ministry for Economic Affairs and Energy, the Federal Government collaborates with individual federal ministries to develop an Action Plan covering the priorities defined in the National Tourism Strategy and detailing specific measures for each of the fields of action. Other actors, such as Länder and business associations, also develop action plans setting out specific measures.

Ongoing actions in support of the Strategy include:

* Tourism for All project, providing information on barrier-free tourism offerings. (Measures include the creation of a nationwide certification system and database, which is made available by the Germany National Tourist Board).
* Development of sustainability guidelines for tourism destinations, dissemination of information on sustainable tourism offerings through the German National Tourist Board, the Green Travel Transformation project to sensitise consumers and the travel trade on sustainability issues, and work on measuring sustainability of tourism.

#

# **Malta**

OECD review: <https://www.oecd-ilibrary.org/sites/6b47b985-en/1/3/5/9/index.html?itemId=/content/publication/6b47b985-en&_csp_=a806bfa96e09b9351b58695070b6c960&itemIGO=oecd&itemContentType=book>

National Tourism Policy 2015-2020: <https://tourism.gov.mt/en/publicconsultations/Pages/2015PublicConsultations/National%20Tourism%20Policy%202015-2020.aspx>

Malta Tourism Strategy 2021-2030 - Recover, Rethink, Revitalise <https://meae.gov.mt/en/Public_Consultations/MTCP/Pages/Consultations/MaltaTourismStrategy20212030RecoverRethinkRevitalise.aspx>

The Ministry’s National Tourism Policy for 2015-20, contains three main inter-related objectives, forming the basis of the sustainable development of tourism to Malta. The objectives are to:

* Manage visitor numbers,
* Raise the level of quality across the entire tourism value chain by upgrading products and services,
* Further reduce seasonality by attracting new geographic source markets and year-round segments.

The following policy actions aimed to address the challenges facing the tourism industry:

* Improve the skill base and promote tourism as a prospective career,
* Improve digitalisation skills and promote innovation,
* Offer additional tourism services and infrastructure,
* Strengthen efforts and governance structures to further improve management and upkeep of tourism zones, beaches, and areas visited by tourists,
* Work to ensure sustainability of the tourism product by encouraging resource efficiency and a circular economy,
* Optimise the relationship between volume growth and value growth particularly during the peak season when saturation levels are high,
* Target strategic markets whilst continuing to focus on product diversification and an improved service offering,
* Provide the necessary support frameworks to enable better performance, higher-value added and an improved economic model in order to generate increased multiplier effects, fair distribution of income and strengthened value-chain linkages.

In order to future-proof tourism policy in Malta, four main priority areas have been identified:

* Modernising tourism regulations. The Ministry of Tourism is in the process of updating the Malta Travel and Tourism Services Act to ensure the legislative framework acts as a stimulus for growth rather than a barrier to change and innovation. The review aims to simplify the legislation and streamline procedures in the development, licensing and enforcement of tourism operations.
* Sharing intelligence. Collaboration of a range of stakeholders from national and local government, DMOs and the private sector through the Malta Tourism Authority (MTA), has created an intelligence sharing system, providing a detailed understanding of developments, issues, threats and opportunities. The MTA carries out research to monitor the profile of incoming tourism and emerging trends in the market place.
* Developing a classification system. Malta has developed a tourism service provider classification system designed to integrate a variety of new offers within existing frameworks.
* Investment in digital innovation. Capabilities for managing future technologies and digital innovation uptake in the tourism sector will be strengthened locally through specific initiatives, such as the Digital Tourism Platform (DTP) being developed by the Ministry for Tourism and MTA. The DTP will provide information relevant to tourists, and it will gather information enabling personalized information to enhance the visitor experience and include Augmented and Virtual Reality to provide an innovative and engaging interface.

Malta’s Tourism Strategy for the period 2021-2030 is built on a three-staged premise:

* A recovery effort from the chaos wrought by the COVID-19 pandemic, focused on protecting and preserving the vital components of Malta’s Visitor Economy in the background of the challenges posed by the pandemic.
* A longer-term re-evaluation and repositioning to reflect evolutionary forces as well as new post pandemic realities – both negative and positive.
* A detailed and committed programme of deliverables covering the various strategic challenges addressed by this strategy with a view to being able to deliver a stronger, more sustainable and competitive tourism industry by 2030.

#

# **Montenegro**

<http://www.bjelasica-komovi.me/wp-content/uploads/2015/02/01_Montenegro_Tourism_Development_Strategy_To_2020.pdf>

* Create the required tourism and accompanying infrastructure for attaining the strategic goal

(Improve transport infrastructure within Montenegro, improve utilities infrastructure, attract investments in new high-quality accommodation facilities, Increase standards of the existing ones, Enhance service quality in tourism sector, Harmonize establishments with the surrounding (blending with the natural environment, Establish “image of clean Montenegro”)

* Develop USP (Unique Selling Point)

(Establish efficient marketing structures, Promote regional clusters to strengthen the tourism potentials in all regions and sub-regions of Montenegro, Implement National Strategy for Sustainable Development)

* To become known and recognised as an all-year destination

(Diversify hotel products and improve leisure and active facilities, Develop and enhance specific products, Identification, promotion and marketing of tourist attractions)

* To make institutional and legislative framework appropriate for successful and sustainable tourism

(Strengthen tourism organizations at the national, regional and local levels, Strengthen inspection services, Introduce the information and quality management system, Improve the legislative framework for tourism development)

* Make local population increasingly involved in tourism industry (“internal marketing“)

(Raise awareness of the importance of tourism as a strategic industry, Enhance entrepreneurship in tourism, link tourism with other local industries (in particular bio/health food production)

# **Morocco**

Vision 2020 by the Department of Tourism: <https://sdgs.un.org/statements/vision-2020-tourism-morocco-focus-sustainability-and-ecotourism-11150>

Vision 2020 is a strategy focused on regional tourism, quality and sustainable development. It is committed to making tourism a driver of economic, social and cultural development in Morocco.

The tourism industry is facing new macroeconomic and political challenges, which influence both the purchasing power of inbound markets to Morocco and the investment potential of industry players. The following trends have been identified as critical factors for Morocco’s tourism:

* Continued acceleration of the digital revolution and new channels of promotion and distribution,
* Increasing individual and independent travel made possible by low-cost offers,
* New patterns of customer behaviour throughout the value chain,
* The emergence of new outbound markets - the tourism sector is doing well due to the sustained growth in the BRIC economies and has boosted its performance in the Chinese market since removing visa requirements for Chinese nationals.

In developing regional tourism, the Department of Tourism works with its partners to adapt and upgrade governance structures, giving decentralized services a greater role in the implementation and development of tourism in their respective territories. Initiatives aiming to support regional tourism development include:

* Enhancing the attractiveness of Morocco as a destination is a key priority. Efforts are being made by the Department of Tourism, through the Moroccan National Tourist Office, to ensure the visibility and accessibility of Morocco's offer from targeted markets. These activities include:
	+ Establishing partnerships with leading online tour operators,
	+ Developing communication campaigns through major websites and the major airline web platforms,
	+ Event-based communication, increased communication via social networks; organisation of familiarisation trips for journalists, tour operators and influencers/bloggers; and, the acquisition of media space along with the dissemination of content on digital media and digital platforms.
* Enhancing the competitiveness of air transport to support growth in tourism, especially through strategic partnerships with main outbound countries and new markets with high potential,
* Stimulating tourist investment by adopting new measures to incentivise and support investors in both existing and new facilities,
* Restructuring of the tourism sector and supporting players in order to boost economic competitiveness, in particular by updating and reviewing laws governing tourism professionals and improving industry oversight,
* Increasing the quality of training to improve the response to industry needs, by diversifying the training offer, restructuring training establishments and signing international partnership agreements for training in tourism and hospitality,
* Strengthening quality standards throughout the tourism value chain in order to guarantee an offer that meets market needs and addresses the key challenges.

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# **Portugal to 2027**

OECD review: <https://www.oecd-ilibrary.org/sites/6b47b985-en/1/3/4/28/index.html?itemId=/content/publication/6b47b985-en&_csp_=a806bfa96e09b9351b58695070b6c960&itemIGO=oecd&itemContentType=book>

Tourism Strategy 2027: <https://www.emeoutlookmag.com/industry-insights/article/511-portugals-2027-vision-to-become-one-of-the-most-sustainable-tourist-destinations-in-the-world>

+ SUSTAINABLE TOURISM PLAN 20-23: <http://business.turismodeportugal.pt/SiteCollectionDocuments/sustentabilidade/plano-turismo-mais-sustentavel-20-23-eng.pdf>

In 2017, the Government launched Tourism Strategy 2027, to drive economic, social and environmental development throughout the country and position Portugal as one of the world’s most competitive and sustainable tourism destinations. It contains five strategic pillars:

* “Valorizar” Program – to stimulate a more balanced distribution of tourism demand, reduce seasonality and generate employment throughout the country. This action plan includes support for providing Wi-Fi access in historical/ tourist areas, supporting projects to implement measures for people with special needs, developing and enhancing the heritage and endogenous resources of the regions and initiatives to promote greater integration between tourists and residents to ultimately improve resident’s quality of life whilst also improving their recognition towards the value of tourism for the community. During the first two years of the program, 1719 proposals were submitted to Turismo de Portugal to which 641 were approved with an incentive of €91.3 million
* Portuguese Trails – aimed at stimulating cycling & walking routes in Portugal to position the country as an international destination for this activity. This action plan will focus on the qualifications of regional destinations to capture new markets and promote business services in partnership with industry stakeholders.
* Portuguese Waves – aimed at promoting the sustainability of surf spots. The main aim of this vertical is to highlight the country’s excellence as a surfing destination whilst also promoting best practices in the way of sustainable tourism. This includes the preservation of nature.
* Sustainability Criteria for investment & Classification- To promote sustainability throughout the value chain. This includes the adoption of environmental and social sustainability in the licensing and public recognition of projects, include sustainability as a relevant element in the classification system of tourism enterprises and to ensure the integration of sustainability concepts in courses and training of future professionals in the sector.
* Promoting a more inclusive tourism- to promote ‘all for all – Portuguese tourism’ insuring our country facilities as well as enterprises are prepared for anyone, independent of their needs.
* Innovation – To build the future of sustainable tourism. This will be actioned by the Tourism Innovation Centre, in partnership with companies like Google and Microsoft, in order to promote technology, new business ideas, transition into a digital economy, open innovation programs, all this in partnership with tourism leaders and other stakeholders from inside and outside the industry.
* Promote Knowledge – To make progress measurable. This will involve programs to monitor the environmental performance of tourism enterprises and sustainability at destination level. Further to this there will be a network of sustainability observatories and mobile data to identify impact. This will also see the participation in international projects to promote knowledge in tourism sustainability via UNWTO MST, INSTO and other educational vehicles.
* Promoting innovation through the Tourism Innovation Centre in Portugal - NEST. Its main areas of activity are:
* Digital academy for tourism start-ups.
* Incubation and acceleration services in partnership with the ecosystem.
* Advising micro, small and medium sized tourism enterprises.
* Development of new products and technologies (Demo) and experimentation, creation and validation of prototypes (Living Lab).
* International promotion of start-ups and innovation.
* Monitoring international digital tourism trends.

# **Sweden**

OECD review: <https://www.oecd-ilibrary.org/sites/6b47b985-en/1/3/4/32/index.html?itemId=/content/publication/6b47b985-en&_csp_=a806bfa96e09b9351b58695070b6c960&itemIGO=oecd&itemContentType=book>
Visit Sweden: <https://corporate.visitsweden.com/om-oss/en/>

+ Plan For Nordic Tourism Cooperation 2019-2023?[https://norden.diva-portal.org/smash/get/diva2:1330360/FULLTEXT02.pdf](https://norden.diva-portal.org/smash/get/diva2%3A1330360/FULLTEXT02.pdf)

* promote sustainable tourism development and provides a platform to implement actions that meets both national and global challenges
* promote stakeholder interaction between enterprises, business organisations, tourism organisations and civil society, within and between municipalities and regions.
* Target specific tourist groups (For the moment - “Global Traveller” - consists of experienced travellers eager to try new destinations and new experiences. They take more trips abroad than average, have a higher income and education and are more likely to live in cities. We have split our target group into three segments with differing motivations for holidaying in Sweden: Curious Travellers, Outdoor Enthusiasts and Holiday Hedonists).