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The INTERREG IIIB ToLearn Project
Developing Sustainable Tourism
in the North Sea Region

Editors:
G. von Rohr, C. Corves & H. Sterr

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The INTERREG IIIB ToLearn Project Developing Sustainable Tourism in the North Sea Region

Requirements and Approaches to Enhance Non-Formal Learning Processes at the Regional and Interregional Level

Final Report

Editors:

Götz von Rohr, Christoph Corves & Horst Sterr

Imprint

Photo front: North Sea Tourism (Photo: ToLearn)

Preface

In all tourism destinations of the North Sea Region (NSR) there is a pronounced general awareness that further development of tourism needs to be organized sustainably, even though regional or local differences can be detected in this awareness. However, it has to be noticed that the responsible destination managers in the different regions are only little or even not at all informed about how other North Sea Destinations deal with the challenge of sustainable development. At the interregional level, the exchange of ideas and experiences still has to be improved, whilst at the international level only few approaches can be observed so far.

Nevertheless, the experience shows that innovations in the development of tourist offers - whether concretely aligned to a sustainable aim or not - are often initiated by good solutions that have been developed elsewhere and which have been adapted to one's own situation and enhanced.

Such **learning processes** take place

> ➢ via the Internet,

> ➢ related to events or other happenings where people meet,

> ➢ in the context of agreed cooperation or with the help of pointedly organised individual forces.

More often than not learning processes occur accidentally and non-sytematic. Chief difficulties are the lack of time of decision makers as well as the lack of knowledge, where and from whom something can be learned.

This is what ToLearn attempts to address. On the one hand, the project documents, how individual North Sea destinations deal with the postulation of sustainable tourism. On the other hand, it provides recommendations for how regional, interregional and international learning processes within sustainable tourism can be enhanced pragmatically. Therefore, regional tourism profiles have been developed, one Pilot Region per partner nation has been chosen where in depth analysis were conducted. In addition, 22 Good Practise Examples are identified and described and four so-called Implementation Projects, one for each Pilot Region, were developed and evaluated. The recommendations include improvements for the publicly accessible information base for tourism development as well as interesting problem-solving solutions for the entire NSR.

This Final Report contains a summary of the accomplished analyses as well as the concluding recommendations. Detailed analyses are documented in a separate volume *ToLearn - Background Investigations*. This volume was printed in a very small edition only but is available on a CD respectively downloadable from www.tolearn.info. In Chapter 1.4 content and authors of the Background Investigations Volume are listed.

The editors would like to thank the Belgian, Danish, Dutch and Norwegian project partners cordially for the intensive and efficient cooperation during the project's preparation and implementation phases over the past two years. Furthermore, we would like to thank the numerous experts and tourism managers who provided most valuable contributions to Focus Groups, Advisory Boards, Conferences and personal interviews. Cordially we would like to thank the project team at Kiel University and the colleagues of N.I.T. who played a leading part in preparing the results and editing the Final Report.

Last but not least we would also like to thank the INTERREG North Sea Region Office in Viborg that supported the project's smooth progress from its side.

Kiel, October 2008

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Final Report

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Executive Summary

In all tourism destinations of the North Sea Region (NSR) there is a pronounced general awareness that further development of tourism needs to be organized sustainably, even though regional or local differences can be detected in this awareness. However, it has to be noticed that the responsible destination managers in the different regions are only little or not at all informed about how other North Sea Destinations deal with the challenge of sustainable development. At the interregional level, the exchange of ideas and experiences still has to be improved, whilst at the international level only few approaches can be observed so far.

Nevertheless the experience shows that innovations and trends in the tourism supply sector - whether concretely aligned to a sustainable aim or not - are often initiated by good solutions that have been developed elsewhere but which have been adapted to one's own situation and perhaps elaborated further. This reflects a process of learning from one another which up to now has never been analyzed and fully understood.

Such **learning processes** in tourism take place

- ➢ via the Internet,
- ➢ related to events or other happenings where people meet,
- ➢ in the context of agreed cooperation or with the help of pointedly organised individual forces.

In the majority of cases learning processes occur accidentally and non-sytematic. Major obstacles and difficulties are the lack of time of decision makers as well as the lack of knowledge or information, where and from whom something can be learned.

This is where the ToLearn project sets in. First of all, it aims to document, how individual North Sea destinations deal with the challenge of sustainable tourism. Therefore, **regional tourism profiles** (Challenge Profiles) were developed for all countries neighboring the North Sea. Moreover, one **Pilot Region** per nation was chosen for in-depth analysis, (but they could only be conducted in the countries of our project partners, i.e. Belgium, Netherlands, Germany and Denmark). For the analysis it was very helpful that the tourism supply sector along the entire NSR features numerous **similarities**:

➢ extensive, attractive and undisturbed nature, only few places with dense settlements (especially in Belgium, North and South Netherlands);

➢ high water quality;

➢ therapeutic climate;

➢ relaxed and quiet atmosphere;

➢ rich cultural heritage with historic structures and charming old, mainly small cities; numerous innovative cultural events;

➢ wide range of guest accommodations both, regarding the structure and today's quality requirements;

➢ a broad variety of activity offers in sports, nature experience and other open air activities (e. g. rugby, walking, cycling);

➢ rather limited accessibility by train, and even limited accessibility by car in some areas.

Despite the similarities there are two types of regions, which clearly differ with respect to their attractiveness for tourists:

➢ The rugged, hard-rock and often steep coasts of Scotland, Norway and Sweden (Bohuslän), where sailing and various kinds of fishing dominate,

➢ the low-lying, "soft" rather straight coastlines of eastern England, Belgium, the Netherlands, Germany and Denmark, where holidays focussing on beach uses dominate.

A unique feature of the latter type of regions is the continuous Wadden Sea area between West Fryslân (Den Helder) and Southern Jutland (Esbjerg), where beach and bathing holidays are concentrated primarily on islands, commonly representing a type of nature tourism. With the natural settings and features described, the NSR as a tourism destination competes – among others - with

➢ the Baltic region with its more continental climate, lower price level and a more modern tourist infrastructure (especially in Eastern Germany, increasingly in Poland and the Baltic countries);

➢ the English Channel and the Biscayan with their milder, but rougher climate;

➢ Southern Portugal, Madeira and the Canary Islands;

➢ the Western and Eastern Mediterranean Sea.

Based on these facts and findings the project ToLearn suggests recommendations for the initiation and enhancement of regional, interregional and international learning processes in order to foster sustainable tourism in this context, in a practical and pragmatic fashion. Along this objective a total of 22 **Good Practise Examples** are documented and 4 newly developed **Implementation Projects** are described and evaluated for their innovative potential. The recommendations also hint at improvements for the publicly accessible information base for tourism development as well as at feasible solutions for problem-solving in the tourism sector of the entire NSR. Resulting from the analyses undertaken in the course of the ToLearn project, including the **Challenge Profiles** and **Pilot Region Analysis**, the following **key findings** with regard to learning were derived:

1. To the majority of decision makers, sustainable (i.e. balanced) tourism development issues are only relevant if they generate sufficient economic benefits (e.g. guests, sold bednights, turnover, added value)

2. Learning is a prerequisite of successful innovation and sustainable tourism development.

3. Substantial learning is taking place every day, focussing on the problem-induced and solution oriented organisation of learning processes.

4. The solution orientation basically prevents consecutive learning processes and frequently leads to starting from scratch.

5. Today's learning processes within the region are primarily non formal and can be better characterised as either „experience exchange" or directed or non-directed search for good practises.

6. The use of and the interest in formal learning processes (i.e. courses, seminars or long-term structured approaches) is relatively low on the level of decision making. However, there seems to be a lack of suitable (informal) learning opportunities for the decision-maker's level.

7. A formal „tourism Learning Area" or "Learning Region" approach cannot be found throughout the NSR.

8. Search for good practises takes place rather in a short term perspective (i.e. "knowledge on demand") than in a long term perspective (i.e. "knowledge on stock"). This of course is different for basic knowledge being acquired during vocational training.

9. Experience exchange takes place constantly; decision makers in the regional context (but not necessarily all entrepreneurs) are meeting each other regularly in different contexts, but mainly without visiting seminars or courses. Although meetings do not necessarily imply a valuable exchange of information, the useful impact of casual communication within the framework of formal meetings has been frequently reported.

10. Only few initiators can provide the impetus for projects and innovations – and thus be able to involve many in a more formalized way.

11. On an interregional or even international level, there are even less opportunities to establish learning processes compared to the intraregional level. However, suitable opportunities for information exchange are the *sine qua non* condition for any learning process.

12. The statistical base for destination oriented decisions (like maintaining or establishing public or private infrastructure and services, distribution of subsidies etc.) on the NSR level is heterogenous and rather unreliable (often incomplete, not comparable and not easy to access).

It should be noted that the analysis and hence the key findings from the analysis focus on the decision making / executive level in politics, government and destination management. For the non-executive level, there might well be other learning mechanisms in place.

The **recommendations** derived on this background could be divided into two groups:

1. General guidelines describing what is important when setting up learning processes

2. Concrete action ideas building the bridge to implementation.

All recommendations and action ideas primarily address the decision maker's level in politics, government and destination management. This is a result of the key findings from the analysis phase, which focused on the learning processes on the decision makers' level.

The **general guidelines** for tourism learning processes are mostly independent from the specific audience:

1. **Learning is a necessary prerequisite for innovation. Innovation can foster sustainable tourism development.**

   Learning itself has prerequisites, namely the existence of opportunities and impulses and the consideration of the audience's objectives and. inducements.

2. **Be as practical and demand oriented as possible - Respect the needs of the markets and the motivations of people.**

   From this project it can be learned, that learning processes trying to foster sustainable tourism development must not be academic exercises. Whoever thinks about the implementation of learning processes with the goal of changing the behaviour of decision makers (in a more sustainable direction) should respect their needs and motivations. The needs are context specific and the motivations usually are not focused on sustainable tourism development which is in most cases not a value in itself for most of the stakeholders.

3. **Use good practises wherever possible - Focus rather on informal than on formal learning processes for the management level.**

   One of the most helpful learning processes can be described as "good practise learning". The possibility to draw from a fount of best, good (and maybe bad) practises and experiences is attractive for decision makers in politics, government and the industries alike. Seminars, courses or the implementation of other formal structures like Learning Regions and Learning Areas usually do not reach the same level of acceptance.

4. **Bring stakeholders from different perspectives together - Implement only those learning opportunities that adhere to the needs of the intended audience.**

   Inducements for the implementation of learning processes can either be based on intrinsic („I want to know") or extrinsic motivations („I have to learn"). Monetary incentives can usually foster extrinsic motivations, but not intrinsic motivations. However, money can help to make opportunities that fit into the motivational system of the intended audience. One of the main intrinsic drivers for learning is curiosity in solutions that have already been found for problems analogous to the own momentary challenges.

5. **Regional Scope: Give proof of the positive impact of regionalized tourism marketing.**
   This guideline is especially viable when private institutions like entrepreneurs and companies shall be addressed with learning processes. Quite often, the perspective of the said audience is limited to the own business. It is crucial for the involvement of entrepreneurs and companies into regional learning processes that they accept the fact that a collaborative approach might not have individual advantages in the short term, but rather in the mid and long term. "Your neighbour is not your enemy".
   Strengthening the coherence of a given region is another guideline for the implementation of learning processes. Results show, that it is much easier to implement practical learning when the audience has a higher grade of involvement and affiliation with their own region.

6. **Implement uncommon learning solutions.**

   One of the barriers for learning processes might be the relative lack of creativity in knowledge transfer. However, there is a number of uncommon techniques and methods that can be used in learning processes (e.g. business games, creativity techniques, web based solutions, competitions). The use of the classical learning and moderation schemes (like cards and pinboards, "Zukunftswerkstatt", seminars, conferences) or other common forms of group moderation and knowledge transfer, seems to become more and more fatiguing for the audience.

These general guidelines shall serve as corridors not only for the action ideas in the next paragraph, but also for any own implementation of tourism learning processes within the NSR.

As opposed to the general guidelines, the **concrete action ideas** are audience specific. Therefore, we distinguish recommendations for the following groups:

1. **Destination Management**

   Destination Management & Marketing Companies, Industries & SME (lodging, transport, leisure, incoming agencies, tour operators), Business development organisations, investors and project developers

2. **Politics and Government**

   National and regional governments, EU institutions, Local councils and governments

3. **Education**

   Higher Education institutions like universities, colleges, private education organisations, others.

The reason for this differentiation is that the three named audiences have different requirements, perspectives and work practises with regard to learning processes:

In *Politics and government*, it is mostly a broad and generalized perspective on tourism development. Tourism development is only one of many fields that have to be dealt with. It is true that in many coastal areas, tourism is the most important sector of the local economy. However, politics and government tend to think more holistically. Furthermore, politics and government in many cases (also) have a regulatory responsibility. It is true that modern governments usually take the role of service units for their stakeholders. However, a certain regulatory and financial perspective has to be taken into account: As a rule, it is politics and government that define the path of and pay for the tourism development of and practical destination management within a tourism area.

Destination management, on the other hand, is much more focussed on tourism development and the practical and executive side of running a tourism area. The perspective is very frequently that of a stakeholder and representative of the local tourism industry.

Educational institutions, like Universities and others, can play a specific role in the definition and implementation of learning processes. They should provide the methodological and technical knowledge necessary for an advancement of tourism learning processes in the NSR.

For the implementation of the above mentioned general guidelines and action ideas, in general the stated audiences should feel responsible. However, there is a need to transport the idea of the guidelines and actions to the appropriate audiences and to increase the probability that any of the recommendations given here have a chance to get implemented.

In the case of EU institutions, this seems to be relatively easy: the ToLearn project has been substantially funded by the INTERREG IIIB NSR programme; therefore the EU institutions should get into contact with the results by way of an automatic mechanism.

In the case of other (i.e. national and regional) political and governmental institutions, destination management companies or even companies and entrepreneurs, the situation is much more complex and difficult.

There is a coordinating body in the NSR that could serve as the primary multiplier for action ideas like those stated in this document. In this regard, the situation is similar to that in other regions:

➤ In the Baltic region, there is *Baltic 21*, a regional multi-stakeholder process for sustainable development initiated in 1996 by the Prime Ministers from the eleven member states of the *Council of the Baltic Sea States* (CBSS). CBSS has been established in 1992. Within this framework, *BTC* (*Baltic Sea Tourism Commission*), initiated 1983, a non-profit organisation of more than 80 institutions and companies in the tourism sector, aims at the development of tourism in the Baltic Sea area (see www.balticsea.com for more information). The Baltic Sea Tourism Commission forms part of the Tourism Task Force of the *Baltic 21 Tourism Sector*.

➤ The *Nordic Council*, established in 1952, is a co-operation between five Nordic countries and three autonomous territories. One of the Councils instruments is the *Nordic Innovation Centre* (NIC), also working on innovation and sustainability issues.

➤ In the Meditarrenean area, *META* and *MTU* (*Mediterranean Travel Association / Mediterranean Travel Union*), founded in 2005 and based in Aix en Provence / France, aim at organising meetings and dissemination of information. (see www.meta-tourism.com for more information). The *Pacific Asia Travel Association* (*PATA*) was a role model for the establishment of META.

For the NSR, the *North Sea Commission* (NSC) is the primary body of political co-ordination and co-operation. Members are sub-national regions in most countries around the North Sea (see Fig. 2.1). "The North Sea Commission was founded in 1989 to facilitate and enhance partnerships between regions which manage the challenges and opportunities presented by the North Sea. Furthermore, to promote the North Sea Basin as a major economic entity within Europe, by encouraging joint development initiatives and political lobbying at European Union level." (www.Northsea.org). The North Sea Commission is one of seven Commissions under the umbrella of the *Conference of Peripheral Maritime Regions* (*CPMR*, wwww.crpm.org). Within the NSC, there is a Culture & Tourism Group, which held its latest meeting in April 2008 in Bergen (NO).

As has been shown in the prerequisites section of most of the recommendations, a functioning co-ordinating body for (sustainable) tourism development in general and tourism learning processes is needed to implement the guidelines and action ideas stated in this document.

The question, whether the NSR is a suitable layout for the implementation of such a co-ordinating body and whether the NSC could be a suitable organisational framework, can not be answered within the ToLearn project.

However, the project can put forward some guiding questions to determine, whether an approach towards a tourism co-ordinating body in the NSR could be viable.

Tourism Marketing Perspective

 ➢ Can the NSR be marketed as a destination?

 ➢ Can customers identify the NSR as a destination?

 ➢ Do tourism marketing organisations have a common perspective on source markets, target groups and the necessities of product development, communication and distribution?

Tourism Economic Perspective

 ➢ Is there a strong economic exchange (goods, services, workforces, traffic routes, finances) within the NSR compared to the exchanges between NSR regions and other regions?

Tourism Political Perspective

 ➢ Can a joint tourism development effort bring substantial progress to the local and regional development?

 ➢ Which role can the ERDF (INTERREG IVB North Sea Region programme) and the NSC (North Sea Commission) play?

The key success factor for the implementation, and thus for all subsequent implementation processes, is however the existence of an institution that serves as an initiator and co-ordinator for the implementation of interregional learning processes. Without such an institution, learning processes, but also the aim of a strategic implementation of sustainable and innovative tourism development processes, will not even have a starting point, not to mention a successful result. Thus, it is suggested to establish an open NSR tourism forum (similar to the "Wadden Sea Forum" = output of a former INTERREG IIIB NSR project) where tourism agencies, managers and researchers can meet regularly and discuss ongoing or foreseen innovations in sustainable tourism development – hence keep the learning process alive in upcoming years.

1   The Approach of ToLearn

1.1   Tourism Regions as *Learning Regions*

1.1.1   The *Learning Region* Paradigm

In the course of contemporary transformation processes in relation to industrial change (from Fordism to post-Fordism or the network economy), information, knowledge and innovation for economic growth have gained in importance. Innovation, which to a great extent depends on the creation, dissemination and application of knowledge, is regarded as key to maintain competitiveness in the knowledge-based economy (Boekema et al. 2001, p. 3). It does not only concern products, but also processes and organisation (Gustavsen 2003, p. 41). According to Rauner (1999), competitiveness and the potential for innovation are based on national traditions such as education, work ethic, politics and culture (Rauner 1999, p. 71). In order to be innovative, learning processes play a central role: either to acquire new knowledge and make use of it, or to develop new methods, products or approaches on the basis of common knowledge. Knowledge can therefore be regarded as the most important resource to create new competences, goods and services; learning, in this respect, can be described as the process through which knowledge is created and acquired (Morgan in: Boekema et al. 2001, p. 7).

Inter- and intraregional or –organisational partnerships and networking activities foster learning processes and innovation (Deitmer & Attwell 1999, p. 65), especially through interfaces between different or even contradictory "reference systems" (Stahl 1999, p. 53), e.g. interfaces between different enterprises or between the management and the employees of certain organisations. Especially transnational and inter-European partnerships are regarded as valuable in the course of regional efforts (e.g. finding partner-regions with similar problems and innovative solutions for these problems) (Stahl 2003, p. 30). In addition, the openness of these networks as well as the absence of preconditions and rules provide fertile ground for options such as new relations, co-working, the development of new products and services and thus, innovation (Stahl 1999, p. 54).

The region shapes up as ideal focal point in this context. In conjunction with regionalisation, the region is not necessarily defined on the basis of regional boundaries (e.g. geographical, administrative or historical boundaries), but rather on strategic considerations (Scheff 2001, p. 28). Due to its smaller scale, its greater nearness in relationships, less social distance and differentiation of roles, planning efforts are easier to coordinate and solutions for upcoming problems can be implemented more flexibly than in larger national entities. Furthermore, closer personal contacts, the feeling of regional identity and shared history form beneficial conditions for effective cooperation and networking processes which foster innovativeness (Nyhan 2003, p. 152). Nevertheless, the region has to be related to superordinate units in order to be able to construct overall consistent policies (Richard 2003, p. 35).

A region which attaches great importance to learning policies can be described as Learning Region (Rauner 1999, p. 71). The term Learning Region derived from the economic term Learning Organisation in the 1990s. In spite of the increasing prominence of the term Learning Region, there is still neither a common concept nor a consistent definition for the concept (Hassink 2004, p. 4). According to Boekema et al. (2001) the Learning Region is rather a paradigm than a sufficient concept or theory due to its diverse insights and angles of research (Boekema et al. 2001, p. 4). Nevertheless, in the multitude of publications dealing with the concept of Learning Regions, a variety of formal features can be summarized that characterise Learning Regions.

According to the European lifelong learning initiative, a Learning Region "recognises and understands the key role of learning in the development of basic prosperity, social stability and personal happiness, and mobilises all its human, physical and financial resources wisely and innovatively to develop the full human potential of all its citizens" (European Commission 2006, p. 14). Hassink (2004) and

Boekema (2001) promote the Learning Region more generally as "regional innovation strategy" (Hassink 2004, p. 5; Boekema 2001, p. 11) focusing mainly on social actions and learning processes (exchange of knowledge) among a broad set of regional actors which offers prospects for a successful future regional development. Stahl (1999) on the other hand, places emphasis on the fact that the concept is "based on the systematic use of complementary interests, competencies and infrastructures to exploit a bottom-up development of enterprises, institutions and administrations by way of partnerships and networks" (Stahl 1999, p. 55). In any case, central in the Learning Region notion is harnessing local initiatives rather than applying a generalised theory (Nyhan 2003, p. 159).

Connectedness as well as the building of active, direct, dynamic and continual interaction and relations between a broad set of local stakeholders who are confronted with regional challenges, are certainly the key features of a Learning Region. Emphasis is laid on the integrative nature of the process in which regional organisations and individuals with different points of view, goals, abilities from all levels (e.g. politicians, policy-makers, chambers of commerce, trade unions, entrepreneurs, non-governmental organisations, education and research institutes) collaborate on specific subjects and themes in an integrated and process-oriented manner in order to produce an outcome that is in the interest of all concerned (Nyhan 1999, p. 23). Thus, the concept of the Learning Region builds upon the mobilisation of the potentials of all regional stakeholders and key institutions (Stahl 2003, p. 11).

Networks for qualification and learning are especially based on multidisciplinary partnerships between the local enterprises and regional education institutions such as universities, technology and innovation centres as well as vocational education and training providers which mark the connection between the local environment and the global economy (Deitmer & Attwell 1999, p. 64). That is important because a Learning Region requires observation of the external environment as much as the internal in order to understand how both systems are interacting with each other (Nyhan 1999, p. 24). Through the exchange, interpretation and observation of experiences, knowledge can be acquired, developed and applied (Deitmer & Attwell 1999, p. 62ff.).

Multilateral trust, solidarity, mutual commitment as well as direct personal involvement and control are certainly advantageous features underlying the networking processes. Fundamental for successful networking is, however, the common local anchorage of the activities. Stakeholders know each other, act in the same environment and are familiar with local needs, interests, potentials and peculiarities and thus, are able to react flexibly on changes of any kind (Stahl 1999, p. 55f.). Deitmer and Attwell (1999) distinguish three types of networks: information, knowledge and innovation networks, characterised by varying degrees of integration, interaction and complexity (Deitmer & Attwell 1999, p. 63). As the functioning of these networks is regarded crucial for a sustainable regional development, this idea has been embedded in the concept of the Learning Region which "emphasis the importance of co-operation and mutual learning at a regional level for innovation and change in modern developed economies" (Deitmer & Attwell 1999, p. 63). Stahl (1999) even accesses networking activities within the Learning Region as "promising in terms of maximising the quantity and optimising the quality of innovation promotion interfaces" (Stahl 1999, p. 55).

Another characteristic of Learning Regions is the fact that learning processes are usually not inflicted by governmental policies (top-down) but are self-organised, self-responsible actions either taken by actors wishing to improve their own activities or resulting from actual needs (bottom-up) (Stahl 2003, p. 18). Thus, they are mainly non-bureaucratic, non-ideological and sustainably promising whereas top-down approaches often tend to have short-term effects. Still, ways have to be found within the Learning Regions to link bottom-up strategies with the top-down approaches of superordinate bodies (public authorities) dialectically in decision-making (Richard 2003, p. 34). According to the Learning Region theory, regional learning and networking processes are usually facilitated by a mediator - either a person or an institution - that initiates the establishment of the Learning Region, putting across the need for cooperation and partnership among the different actors of the region (Deitmer & Attwell 1999, p. 65). Effectiveness and efficiency of the networking processes need to be accessed through constant mutual monitoring and evaluation by all partners (Stahl 1999, p. 54).

Learning in the context of the Learning Region differs from the common understanding of the process. Learning is usually defined as a permanent growth of knowledge and understanding which is primarily assigned to formal learning processes of institutionalised training and education (Ernste 2003, p. 113). In the Learning Region much of its learning is reinforced by informal and interactive learning processes (Nyhan 2003, p. 153). Informal learning processes are embedded in everyday events, so that work and life provide opportunities for learning at all times (Nyhan 1999, p. 24). Collectively, people learn to understand the causes of local problems and develop competences to be able to face them (Nyhan 2003, p. 164). According to Nyhan (2003), formal and informal learning activities need to be kept in balance (Nyhan 2003, p. 154). Education and training institutions (especially universities), though addressing learning in the formal academic context, are often perceived to be the breeding ground for the production of new ideas and cooperation processes, providing spaces for inspiration, reflection and creative thinking (Ernste 2003, p. 122; Nyhan et al. 1999, p. 10f.). Thus, they also fit well in the role to facilitate and mediate cooperative learning processes and knowledge development (Nyhan 2003, p. 154).

1.1.2   *Learning Regions* **in the Tourism Sector**

In order to provide solutions to the challenges that the tourism sector is facing, the European Commission published a comprehensive handbook on the creation of Tourism Learning Areas (TLAs) in 2006. Especially issues like attracting, retaining and developing skilled labour, improving competitiveness of small and medium-sized enterprises (SMEs), ensuring destination quality and sustainability in the expanding market as well as the poor image of the tourism industry (low wages, seasonal employment, low level of education etc.) have been detected as problematic for tourism stability and growth throughout the European tourism sector (European Commission 2006, p. 5f.). The Learning Area approach is regarded as general problem-solving methodology, addressing competitiveness and sustainability problems not only within the tourism sector but also taking into account the overall situation of the European economy (European Commission 2006, p. 6).

The TLA Handbook develops the theoretical basis of the TLA concept and is intended to serve as practical guide for the implementation of Learning Areas (European Commission 2006, p. IX). It extends the term Learning Region by a non-spatial, conceptual component, and thus, terming it Learning Area, using the ambiguity of the word 'area'. The focus, however, is still on the realisation of Learning Areas in a geographical context (European Commission 2006, p. 14). Furthermore, it distinguishes more closely between education and learning. While education is defined from an institutional perspective, distinguishing formal (in universities, schools, colleges etc.) and non-formal education (taking place within and outside educational institutions), learning is rather characterised from an individual perspective, improving the individual's "behaviour, information, knowledge, understanding, attitude, values or skills" (European Commission 2006, p. 12). Therefore, the Learning Area approach is to develop "a dynamic synergy between the individual, the company and the territory" (European Commission 2006, p. 10) which is to be achieved through the formation of thematic, destination-level and regional knowledge networks. The overall objective is to advance tourism innovation.

Unlike the previous approaches, the TLA Handbook focuses strongly on the involvement of and collaboration between formal education and training institutions as well as the creation and provision of local cooperation platforms (e.g. via an Internet platform) for learning and qualification of tourism professionals in the Learning Region in order to support and organise collaboration. Nevertheless, the approach does not only put formal education and learning processes to the fore. There is also emphasis on the establishment and reinforcement of non-formal and informal learning structures as well as an active dialogue between the sector stakeholders in order to improve mutual understanding of problems and goals (European Commission 2006, p. 8). Therefore, the Learning Areas approach "involves all tourism and training stakeholders in the learning and innovation process through active practical

cooperation and networking" (European Commission 2006, p. IX). In this context, multiple learning and innovation processes of high quality are regarded as important (European Commission 2006, p. 3). Learning opportunities need to be provided and made available for all tourism stakeholders in a region (European Commission 2006, p. XIII). The better the learning opportunities are, the more likely is a positive contribution to the economic, environmental and social processes of the Learning Area (European Commission 2006, p. 10).

According to the TLA Handbook, three major steps are necessary for setting up a TLA. The initiation phase, in which an understanding of the concept is to be developed and the TLA itself as well as all the persons concerned are to be defined, is followed by the coordination phase. The coordination phase serves the purpose to develop structures and to coordinate the ongoing activities. Finally, in the development phase, the activities are implemented and adjusted to the learning needs of the TLA (European Commission 2006, p. XV).

1.2 Strategies of Sustainable Tourism Development – Guiding Principles and Approaches

Since the Rio Declaration on Environment and Development in 1992, the concept of sustainable development has been widely accepted as basis for future planning and management. Sustainable development encompasses three interdependent dimensions of sustainability which need to be conciliated (UNEP 2005, p. 9):

➢ economic sustainability,

➢ social sustainability and

➢ environmental sustainability.

In the European Union the three objectives of sustainable development have been given overarching priority and have been anchored in the Sustainable Development Strategy (SDS). The SDS sets out priorities and actions for a sustainable development which "requires safeguarding the earth's capacity to support life in all its diversity. It embraces concerns for environmental protection, social equity and the quality of life, cultural diversity and a dynamic, viable economy delivering jobs and prosperity for all" (Tourism Sustainability Group 2007, p. 2).

Due to the fact that tourism has grown to one of the most significant and continuously expanding economic sectors, it is essential to apply sustainable development strategies to the sector. Tourist numbers are expected to grow further during the next decades, and thus, the prospects of tourism to contribute to economic prosperity and success are excellent. Tourism provides opportunities for the development of enterprises and the creation of jobs, stimulates investment as well as increases and supports the conservation of natural and cultural resources. Furthermore, it contributes to inter-cultural understanding and peace (UNEP 2005, p. 10). However, growing numbers of tourists also constitute considerable challenges and threats to the local communities and the environment (UNEP 2005, p. 2). Tourism can place pressure on fragile ecosystems, can contribute massively to the degradation of the environment and the disruption of wildlife. It can also exert pressure on host communities, leading to the dislocation and destruction of traditional societies in the worst case. More obvious are tourism impacts such as pollution and the overuse of scarce resources like land and water (UNEP 2005, p. 10).

In this context, sustainable tourism describes an approach that is based on the principles of sustainable development and aims at balancing social and economic objectives with environmentally friendly management in order to achieve economic prosperity, social equity and cohesion as well as environmental and cultural protection (Tourism Sustainability Group 2007, p. 3). It refers to a condition rather than a type of tourism (UNEP 2005, p. 11). The United Nations World Tourism Organisation (UNWTO) defines sustainable tourism as "tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry,

the environment and host communities" (UNEP 2005, p. 12). Thus, tourism should take on a long-term development strategy towards

> ➢ minimizing the negative impacts that tourism has on the society and the environment as well as

> ➢ maximizing the positive effects that tourism can have for local economies, the conservation of natural and cultural heritage as well as the quality of life of both, hosts and visitors

in order to develop internationally competitive destinations (UNEP 2005, p. 18f.).

To successfully establish sustainable tourism development, all stakeholders being part of the complex and fragmented tourism system have to take responsibility regarding a sustainable tourism development. All aspects and sub-systems of tourism that have impact on each other have to be developed in a sustainable manner. Otherwise, tourism is very likely to become the victim of its own success (UNEP 2005, p. 10). A holistic and integrated approach with a high level of cooperation involving all tourism stakeholders (e.g. tourism enterprises, local communities, environmentalists, the tourists themselves as well as public authorities) is required in order to balance diverging interests and motivations (Berno & Bricker 2001, p. 12).

In this context, governments are assigned a critical role in creating an environment that stimulates actions and development processes and minimizes risks towards a more sustainable future tourism as well as ensures wide participation and consensus building (UNEP 2005, p. 3). Furthermore, in order to improve the understanding of negative impacts accompanied by the necessity of setting certain limits, impacts need to be reflected in costs. It is also necessary to be alert to changing conditions that have impact on tourism, especially regarding global threats. Thus, continuous monitoring of tourism trends and challenges is necessary, so that policies and action can be adjusted. Skills and experience should be shared across Europe (Tourism Sustainability Group 2007, p. 3f.).

The ToLearn approach, which will be elaborately introduced in Chapter 1.3, especially aims at improving mutual understanding for diverging perspectives of the tourism stakeholders by intensifying interregional and intersectoral learning processes. Furthermore, the project promotes the application of a consistent set of criteria concerning sustainability aspects of tourism activities in the involved regions along the North Sea coast. The application of these criteria in connection with a set of sustainability indicators provides tourism practitioners, local politics and research institutions with a toolset to compare the performance of their specific region with the standards and benchmarks elaborated within the EU SDS.

Twelve sustainability criteria have been developed by the United Nations World Tourism Organisation (UNWTO) and the United Nations Environment Programme (UNEP) in 2005. The criteria form the essential part of the tourism policy of the EU, fostering sustainability and competitiveness of European tourism. They can be allocated to the three dimensions of sustainable development (UNEP 2005, p. 18ff.):

At the economic level:

> ➢ **Economic Viability**
>
> To ensure the viability and competitiveness of tourism destinations and enterprises, so that they are able to continue to prosper and deliver benefits in the long term.

> ➢ **Local Prosperity**
>
> To maximise the contribution of tourism to the economic prosperity of the host destination including the proportion of visitor spending that is retained locally.

➤ **Employment Quality**

To strengthen the number and quality of local jobs created and supported by tourism, including the level of pay, conditions of service and availability to all without discrimination by gender, race, disability or in other ways.

At the social level:

➤ **Social Equity**

To seek a widespread and fair distribution of economic and social benefits from tourism throughout the recipient community including improving opportunities, income and services available to the poor.

➤ **Visitor Fulfilment**

To provide a safe, satisfying and fulfilling experience for visitors, available to all without discrimination by gender, race, disability or in other ways.

➤ **Local Control**

To engage and empower local communities in planning and decision making about the management and future development of tourism in their area, in consultation with other stakeholders.

➤ **Community Well-Being**

To maintain and strengthen the quality of life in local communities, including social structures and access to resources, amenities and life support systems, avoiding any form of social degradation or exploitation.

➤ **Cultural Richness**

To respect and enhance the historic heritage, authentic culture, traditions and distinctiveness of host communities.

At the environmental level:

➤ **Physical Integrity**

To maintain and enhance the quality of landscapes, both urban and rural and avoid the physical and visual degradation of the environment.

➤ **Biological Diversity**

To support the conservation of natural areas, habitats and wildlife, and minimise damage to them.

➤ **Resource Efficiency**

To minimise the use of scarce and non-renewable resources in the development and operation of tourism facilities and services.

➤ **Environmental Purity**

To minimise the pollution of air, water and land and the generation of waste by tourism enterprises and visitors.

Many of these criteria relate to more than one sustainability dimension. All 12 criteria are generally regarded as very important matters of tourism and therefore fundamental for ToLearn. Nevertheless, it has to be pointed out that the relevance of the criteria may differ according to the perspective of the different tourism stakeholders.

In addition to the formulation of the sustainability criteria, the European commission set up a Tourism Sustainability Group (TSG) in 2004 in order to set out actions for more sustainable European tourism (Tourism Sustainability Group 2007, p. 1). The investigations have been evaluated in an elaborate report. Amongst other things, the report specifies eight key challenges for the sustainability of European tourism that have also been considered in the course of ToLearn. If tourism is to be brought forward sustainably, these key challenges should be addressed (Tourism Sustainability Group 2007, p. 7ff.):

- ➢ Reducing the seasonality of demand,
- ➢ addressing the impact of tourism transport,
- ➢ improving the quality of tourism jobs,
- ➢ maintaining and enhancing community prosperity and quality of life in the face of change,
- ➢ minimising resource use and production of waste,
- ➢ conserving and giving value to natural and cultural heritage,
- ➢ making holidays available to all and
- ➢ using tourism as a tool in global sustainable development.

1.3 The Objective of ToLearn: Enhancing Sustainable Tourism Development by Intensifying Interregional Learning Processes

As mentioned in Chapter 1.1.2, high systematic demands are made on the development of a TLA in the TLA handbook. Although stating the importance of intra- and interregional cooperation and networking between the different stakeholders of a region, the approach is rather standardized, formal and needs to be imposed from above (top-down). Learning Areas are presented as a theoretic working model rather than a dynamic concept. In consequence, the emergence of Learning Areas according to the Learning Area theory postulated in the TLA handbook, is hardly possible.

Nevertheless, it is widely known that in learning processes taking place, "elements, individual components and practical sequence forms of the Learning Region" (Stahl 2003, p. 31) can be found. It can be taken for granted that every region has experience with networking, knowledge, experience and information exchange as well as learning processes and innovations resulting from these co-operational activities, even though learning processes are mostly fragmentary and improvable and the majority of the destinations is lacking a satisfactory knowledge management. The diversity of the existing projects and structures proves that a Learning Region can be manifold (resulting from the self-organisation and self-responsibility of the regions) and that every region learns, some slower and sometimes without striking achievements, some quicker and more successfully (Stahl 2003, p. 31). In this context, learning processes are mainly of informal nature and can better be characterised as exchange of experience or as problem- or demand-induced search for Good Practise Examples. The experiences can differ widely from each other. Therefore, Learning Areas as presented in the TLA handbook can hardly serve as a uniform role model for the implementation of tourism learning processes.

Because opportunities to learn can be accessed in a variety of settings, by anyone of any age and for any purpose (life-long and life-wide learning) (European Commission 2006, p. 8), the ToLearn project regards learning as a dynamic process which takes place in every region at all times, either in formal, non-formal or informal ways. Therefore, the intention of ToLearn is not to artificially develop learning processes but to create beneficial conditions that intensify and design existing learning processes more effectively as well as encourage further learning experiences. ToLearn focuses on further requirements and approaches for the enhancement of non-formal (informal or problem-induced) learning processes and knowledge transfer within the tourism sector at the regional and interregional level.

The project is based on the assumption that a sustainable development of the tourism sector that will lead to long term improvement of the competitive position of the NSR (NSR) can only be achieved through a process of regional learning, transnational networking and cooperation. As hardly any evidence could be supplied of the development, implementation or existence of effective interregional and international learning structures regarding sustainable tourism in the NSR, ToLearn decided to put the enhancement of learning processes, learning phenomena and learning experiences within and between the different tourism destinations in the NSR in the centre of attention. In the framework of ToLearn it is assumed that, although numerous approaches to the promotion of sustainable tourism strategies exist within the NSR, the majority of the tourist destinations in the NSR have attempted to tackle their development challenges on their own and from scratch instead of building upon existing knowledge and experiences from other regions with similar backgrounds.

Therefore, major concerns of ToLearn are:

- ➢ to enhance the general knowledge on sustainable tourism implementation in the NSR via analyses and documentation of the current state and structures of the tourism sector and of (trends in) tourism development; and secondly

- ➢ to develop short- and long term priority recommendations in order to optimise learning processes within and between destinations that foster sustainable tourism development in the NSR.

1.4   Project Approach

To successfully achieve the objectives, the project approach of ToLearn encompassed five major focal points:

1.   Analysis and comparison of the current situation of tourism in the NSRs

The general data analysis at the outset of the ToLearn Project was intended to lay the foundations for a comparable data and information base concerning tourism in the NSR. It is an essential prerequisite for stimulating mutual learning processes to identify tourism regions that are facing comparable conditions and development challenges. In a first step, secondary statistical data provided by international statistics (EUROSTAT) served as initial source for the analysis. Yet it soon was evident that the statistical basis for comprehensive comparisons provided by the European is very heterogeneous and data therefore are hardly comparable. No comparable schemes concerning the different types of tourist regions and their development, especially regarding strengths, weaknesses, opportunities and threats along the North Sea coast could be identified.

Thus, a first concern of ToLearn was to compensate for this deficiency. In this regard, it was necessary to execute a baseline survey in order to collect current quantitative statistical data available as well as to conduct qualitative interviews with national and regional tourism experts in all coastal regions adjacent to the North Sea: Belgium, the Netherlands, Germany, Denmark, Sweden, Norway and the United Kingdom. To ensure comparability, a standardized questionnaire (discussion guide) that covered all subjects relevant for the analysis such as the current situation of tourism (target groups, travel incentives, demand and supply characteristics and SWOT analysis) as well as regional trends and challenges for sustainable tourism development (importance of sustainability issues, communication structures, institutionalised learning processes and knowledge management, regional innovation, visitor management and tourism policies) was jointly developed by the project partners. Within the scope of the quantitative research, a number of other secondary sources (surveys, analysis, articles, reports and strategy papers of the regional tourist boards and other research institutes as well as destination marketing platforms on the Internet) have been considered. Furthermore, in-depth interviews with tourism experts were conducted in each tourist region, applying the focus groups approach. The primary reason for the

expert interviews was the need of qualitative information on aspects of tourism. It was expected that key players in tourism might provide valuable insights, well-founded expertise, as well as personal opinions on the tourism situation within the NSR. On the basis of this information, 14 Challenge Profiles have been developed, one for each region.

The main findings from the situation analysis are outlined and evaluated in Chapter 2. While Chapters 2.1 and 2.2 provide a rather general overview on tourism in the NSR based on the EUROSTAT data, Chapters 2.3 and 2.4 summarize and evaluate strengths, weaknesses, opportunities and threats as well as regional strategies for sustainable tourism development by means of the different Challenge Profiles.

The complete comparative data collection and analysis on tourism development in the NSR, the Challenge Profiles as well as the discussion guide for the focus groups are enclosed in the appendix volume *ToLearn – Background Investigations* (downloadable from www.tolearn.info).

2.   Analysis of selected Pilot Regions

In order to analyse regional learning conditions and communication structures concerning sustainable tourism in more detail, four pilots regions have been selected:

- ➢ Belgium: Belgian North Sea Coast
- ➢ Denmark: Danish Wadden Sea Region
- ➢ Germany: Region Uthlande
- ➢ Netherlands: North Netherlands (West Frisian Islands)
- ➢ Norway: Rogaland County (partly)

These regions have been regarded as been particularly successful in finding innovative solutions and strategies to develop sustainable tourism.

To identify opportunities for improving sustainability practises as well as to analyse regional forms of cooperation and interregional collaboration and successful approaches to knowledge management and innovation in each Pilot Region, a sustainability and innovation check was conducted through expert discussion. Apart from the detailed analysis of the aspects of the Challenge Profiles for each Pilot Region, approximately ten expert discussions were held in each Pilot Region, comprising the following lead questions:

- ➢ How important are regional communication structures, networks, learning processes as well as key actors and key institutions for the development of the region's tourism sector?
- ➢ Which communication structures and learning processes formed the basis for the region's success?
- ➢ What are the main barriers to implementing innovative strategies and which steps have been taken to overcome such barriers?
- ➢ Which strategies aimed at coping with challenges in tourism implemented in the past years could be considered innovative and may serve as Good Practise Examples to other regions?

No Pilot Regions have been selected in Sweden and the United Kingdom because there were no partners contributing to the ToLearn project in these countries. Due to limited finance and staff capacities, the analysis of a Norwegian Pilot Region could not be carried out in full.

The results of the Pilot Regions analyses are summarized in Chapters 3.1 and 3.2 of this report.

The Pilot Region analyses for each of the Pilot Regions as well as the expert discussion guide for the Pilot Region analyses are enclosed in the appendix volume *ToLearn – Background Investigations*.

3. Analysis of Selected Good Practise Examples

Due to the fact that non-formal learning processes emanating from Good Practise Examples seem to be much more promising to successfully enhance learning structures within and between regions compared to the application of formal approaches (like those of the *Learning Region* and the *Tourism Learning Area)*, 22 examples of "good practise" were identified and evaluated in the course of the Pilot Region analyses with regard to

➢ the example's special significance for the development of sustainable tourism within the Pilot Regions as well as

➢ the existence of exemplary learning structures during the project's initiation, development and implementation phase.

➢ the Good Practise Examples' importance concerning their contribution to tourism innovation in the Pilot Regions. A summarising and systematising analysis of the Good Practise Examples is conducted in Chapter 3.3. All GPEs are documented elaborately in the appendix volume *ToLearn – Background Investigations*.

4. Selection and analysis of innovative Implementation Projects

Resulting from the detailed analysis of the Pilot Regions, one innovative activity in each Pilot Region was selected which has proven successful in strengthening the sustainable quality of tourism and seems suitable of being transferred to other destinations. The selection of the innovative projects came to pass in compliance with the common sustainability indicators. During the two-year-period of ToLearn, the implementation process of these projects was supported, monitored and evaluated. The results of the innovation projects and their implementation have also been condensed into practical workshops introduced to the project partners and the tourism community in order to disseminate successfully accomplished projects transnationally and to encourage the adoption of these innovative ideas in other tourism destinations.

In Chapter 4 of this report the implementation projects are analysed with respect to their incentive for the innovation processes that contribute to the enhancement of sustainable tourism development. Furthermore, recommendations concerning transferability, adaptation and dissemination of these projects are given.

Detailed descriptions of the implementation projects are enclosed in the appendix volume *ToLearn – Background Investigations*.

5. Recommendations for action

The fifth and final objective of the ToLearn project comprised recommendations for action as to how to positively influence the short-term and long-term development of tourism both,

➢ for the NSR in general and

➢ for each participating Pilot Region in particular.

Practical operational recommendations were developed on the basis of the preceding analyses in order to

➢ develop a conceptual framework for structuring learning processes in tourism regions,

- ➤ assist the dissemination of further sustainability initiatives in the tourism sector as well as to

- ➤ improve learning processes and strengthen communication structures leading to innovation, sustainable tourism development and increased competitiveness of the tourism sector.

The general guidelines for tourism learning processes and concrete action ideas for tourism stakeholders from different levels are compiled in Chapter 5.

Furthermore, ToLearn adapted a multi-layered approach in communication in order to facilitate transnational communication structures and learning processes between the NSRs encompassing

- ➤ regular newsletters to inform the project partners as well as external stakeholders on the project's advancement, experiences and successful strategies in dealing with trends and challenges affecting the development of sustainable tourism in the NSR,

- ➤ conferences and study visits to foster personal contacts, transnational cooperation and exchange of experience among regional tourism stakeholders,

- ➤ the construction of an internet platform for internal communication as well as external information on and dissemination of the findings and outcomes of ToLearn,

- ➤ an open exchange of information among the project partners and subpartners via a mailing list as well as

- ➤ a series of national and transnational workshops for tourism stakeholders in order to portray examples on the successful development of innovation strategies dealing with development challenges and to provide toolkits that help stakeholders in other regions to adopt these practises to their specific setting.

The documentation of the complete background analysis has been compiled in the appendix volume to the present final report *ToLearn – Background Investigations*. Due to its scale, the volume is only digitally available. It is either available for download on the ToLearn website: www.tolearn.info or can be provided on CD-ROM.

The following overview lists the content and authors of the background analysis material in the additional volume:

- ➤ Tourism Development in the NSR – Comparative Data Collection and Analysis (Henrike Beer & Ulf Sonntag)

- ➤ Tourism Development in the NSR – Maps (Karen Szemacha)

- ➤ Challenge Profile Belgium (Renata Januszewska & Jacques Viaene)

- ➤ Challenge Profile Denmark (Anja Hergesell & Bodil Stilling Blichfeldt)

- ➤ Challenge Profile Lower Saxony, Germany (Dirk Schmücker)

- ➤ Challenge Profile Schleswig-Holstein, Germany (Götz von Rohr, Katharina Drews & Kerstin Hoffmann)

- ➤ Challenge Profile North Netherlands (Albert Postma)

- ➤ Challenge Profile Northwest Netherlands (Albert Postma)

- ➤ Challenge Profile Southwest Netherlands (Albert Postma)

- ➤ Challenge Profile Rogaland, Norway (Reidar Mykletun)

- ➤ Challenge Profile Bohuslän, Sweden (Katharina Drews)

- ➤ Challenge Profile East of England, United Kingdom (Kerstin Hoffmann & Karen Szemacha)

- ➤ Challenge Profile Lincolnshire, United Kingdom (Kerstin Hoffmann & Sanda Enderwitz)

- Challenge Profile Northeast England, United Kingdom (Kerstin Hoffmann & Sandra Enderwitz)
- Challenge Profile Scotland, United Kingdom (Kerstin Hoffmann)
- Challenge Profile Yorkshire, United Kingdom (Kerstin Hoffmann & Sandra Enderwitz)
- Pilot Region Analysis Belgian North Sea Coast (Renata Januszewska & Jacques Viaene)
- Pilot Region Analysis Danish Wadden Sea Region (Anja Hergesell)
- Pilot Region Analysis Region Uthlande, Germany (Kerstin Hoffmann)
- Pilot Region Analysis North Netherlands (Albert Postma)
- Implementation Project Belgium (Renata Januszewska & Jacques Viaene)
- Implementation Project Denmark (Niels Christian Nielsen)
- Implementation Project Germany (Christian Galonska)
- Implementation Project Netherlands (Albert Postma)

2   The North Sea Region as Area of Investigation

2.1   Relevance of Coastal Tourism for the North Sea Region

2.1.1   Methodological Framework: Potentials and Limitations of Statistical Compilation of Tourism Activity

The analysis of tourism and population in the eligible area of the NSR is mainly based on statistical data from Eurostat. Eurostat, the Statistical Office of the European Union situated in Luxembourg, provides the European Union with statistics at European level. These statistics enable comparisons between countries and regions concerning different aspects like tourism and population.

The data are collected in the member states by their statistical authorities themselves. Eurostat's role is to consolidate the data and to ensure that they are comparable, using standardized methodology.

Still, there is a lot of work to be done in harmonizing tourism statistics of the different member countries. There are e.g. problems on the supply side data concerning comparability, completeness and "up-to-dateness" of the data, mainly due to different systems of tourism statistics.

Because Eurostat is the only provider of tourism statistics at European regional level with its data harmonized as far as possible, this data source was chosen to be the backbone of the comparative analysis of tourism development in the NSR region.

In addition to the Eurostat data further data sources were used complementarily to contribute to a complete picture of tourism development in the NSR: national statistical offices of the seven NSR countries, German National Tourist Board (DZT country reports), the World Tourism Organisation (UNWTO World Tourism Barometer), IPK international (World Travel Monitor) and the Forschungsgemeinschaft Urlaub und Reisen (F.U.R Reiseanalyse).

The geographical level of data availability in the Eurostat database is dependent on the topic. Eurostat data of different scale is classified according to the NUTS nomenclature. The Nomenclature of Territorial Units for Statistics (NUTS) was established by Eurostat more than 25 years ago in order to provide a single uniform breakdown of territorial units for the production of regional statistics for the European Union. The NUTS nomenclature is defined only for the 27 Member Countries of the European Union. For the additional countries comprising the European Economic Area (EEA) a coding of the regions has been accomplished in a way that resembles the NUTS.

Because the NUTS regions are defined as regional units of a general nature, population and area can vary considerably between the countries. For Denmark for example, there is no differentiation between the national, NUTS 1 and Nuts 2 level. The NUTS 3 level of Denmark refers to the provinces (amter) of the country while in other countries, for example Germany, the NUTS 3 level refers to smaller areas like districts (Kreise).

In the case of this statistical analysis, most of the general aspects like population, area or the tourism capacity in the different countries are available down to the level of NUTS 3. Data concerning tourism demand like the number of arrivals or the numbers of nights spent are available at Eurostat only down to the level of NUTS 2. The data of tourism demand on the NUTS 3 level has been collected from various national statistical offices as far as possible.

The Eurostat database offers statistics for a large variety of indicators for the member countries. As explained above, the aim is a harmonization of the national statistical data. In reality there is still quite a long way to go until reaching this aim. Concerning tourism statistics, this means that there are still different definitions for the data which was collected for this paper. For example, there are different ways of defining a hotel which is to be counted in the statistics. While in Denmark a hotel needs at least 40 bed-places to be counted in the statistics, the Swedish statistic gathers the data from each hotel

and similar establishment which has more than 5 rooms or 9 bed-places. This has to be taken into account when comparing statistical data on the tourism development of different countries.

The analysis of the other establishments in the tourism sector like camping places, holiday dwellings or other accommodation establishments is even more difficult. The differences in definition are even wider in the different countries and there are many gaps in the data provided. Because of the comparably bigger differences regarding this problem, there is no separate analysis of the camping places, holiday dwellings and other collective data n.e.s. in this report. To get an idea about the importance of the other establishments for tourism, they will be analysed altogether under the Eurostat definition 'other establishments'.

Table 2.1: Size threshold (Eurostat, National Office for Statistics UK)

Country	Hotels and similar establishments	Other collective accommodation
Belgium	No information available	No information available
Denmark	40 beds or more (since 1990)	Tourist-campsites = 75 pitches or more (since 1990)
Germany	9 bed-places or more	9 bed-places or more
Netherlands	*Until 1997*: 20 bed-places or more (without youth hostels) *Since 1998*: 5 bed-places or more (including youth hostels)	*Until 1997*: Campsites: 100 pitches or more (counted as 400 sleeping places or more) Holiday dwellings: 50 bed-places or more Group accommodations: 50 bed-places or more *Since 1998*: Campsites: 4 pitches or more (counted as 20 sleeping-places or more) Holiday dwellings: 20 bed-places or more Group accommodation: 20 bed-places or more
Sweden	5 rooms or more, or 9 bed-places or more (since 1996)	Holiday-dwellings: 5 cottages or more or 20 bed-places or more (since 1996) Camping sites: 20 pitches or more (since 2003)
United Kingdom	No national minimum	No information available
Norway	20 bed-places or more	Camping sites: 50 pitches or more or 8 huts or more Holiday dwellings: 3 huts or more Hostelling International Norway: all

Another factor which limits the possibility of comparing NSR data is the lack of data. Some countries do not offer any actual data concerning tourism at all. In the report, missing data in the analysed years (1995, 2000 and 2005) were indicated and replaced, if possible, by the data of the preceding or following year.

The availability of tourism demand data was another problem in this analysis. Eurostat did not provide this kind of data at the level of NUTS 3 so the data needed to be collected from the different national statistical offices. The access to this data was rather difficult because of terms of privacy or the lack of data in the offices themselves.

Knowing about the structure of the existing data the best results possible (concerning comparability and completeness) could be received by analysing tourism supply and demand data separately in two categories: "Hotels and similar establishments", where the data is more comparable and complete, and "other establishments" with bigger differences in definitions and more data missing.

The statistical analysis refers to the eligible area of the NSR which has been defined in most countries with the accuracy of the NUTS 2 level. Sweden and Norway are the exception: here the border is

defined partly at the level of NUTS 3. This geographical definition of the eligible area makes a processing of the 'raw' Eurostat data necessary, to make sure that the data on NUTS 2, NUTS 1 and at the national level represent only that part of each geographic level that is part of the eligible area. To ensure this, the loWest defined level has been used for the calculation of the data for the next higher level. This means that the calculated NUTS 1 regions contain only those NUTS 2 regions which belong to the eligible area. The national data has been calculated in the same way. Because of this procedure there is the possibility to compare just the eligible area even at the national level without any influences of the rest of the country.

At the national, NUTS 1 and NUTS 2 level the analysis considers the whole eligible area. At the NUTS 3 level only coastal regions with direct access to the sea have been covered. This is the reason why there are some regions listed at the level of NUTS 2 but do not occur at the level of NUTS 3.

For more detailed information you will find the analysis "Tourism Development in the NSR: Comparative Data Collection and Analysis" (N.I.T. 2007) including the major cities in the appendix *ToLearn - Background Investigations*.

2.1.2   Coastal Tourism at the North Sea: Regional and National Importance

The assessment of the importance and development of tourism in the NSR is the main aim of this chapter. On the basis of statistical data provided by Eurostat and the countries' national statistical offices within the NSR this chapter will provide an overview of the main results of the report "Tourism Development in the NSR: Comparative Data Collection and Analysis" (Beer & Sonntag 2007).

To estimate the relevance of tourism in the NSR it is important to obtain a detailed analysis of the central aspects of supply and demand in tourism. Combined factors like tourism intensity (bed-places/1000 inhabitants) and occupancy rates help to evaluate the situation. Due to different cut-off points concerning the tourism related indicators of the single nations, an easy comparison is not always possible.

Details on tourism influencing general aspects like population and area as well as information on the labour market and economical information will provide the necessary background for this analysis.

The fact that there are just very few major cities in the NSR, the regions they lie within might be influenced by the character of the major cities. Because of this influence the major cities will be excluded from the further analysis in the Final Report as far as possible. This exclusion is limited by the existence of the necessary data (see also Chapter 2.1.1).

Because most of the data is available on the level of NUTS 2[1] the differentiation of the major cities was made on this level. This means that not all of the major cities could be separated for the analysis because of their definition on the level of NUTS 3. Only these regions which mainly consist of major cities were excluded[2].

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[1] NUTS: Nomenclature of Territorial Units for Statistics (statistical scale levels)

[2] Excluded major cities (regions) on the level of Nuts 2: Bremen (de50), Hamburg (de60), South Yorkshire (uke3), West Yorkshire (uke4) and Oslo og Akershus (no01)
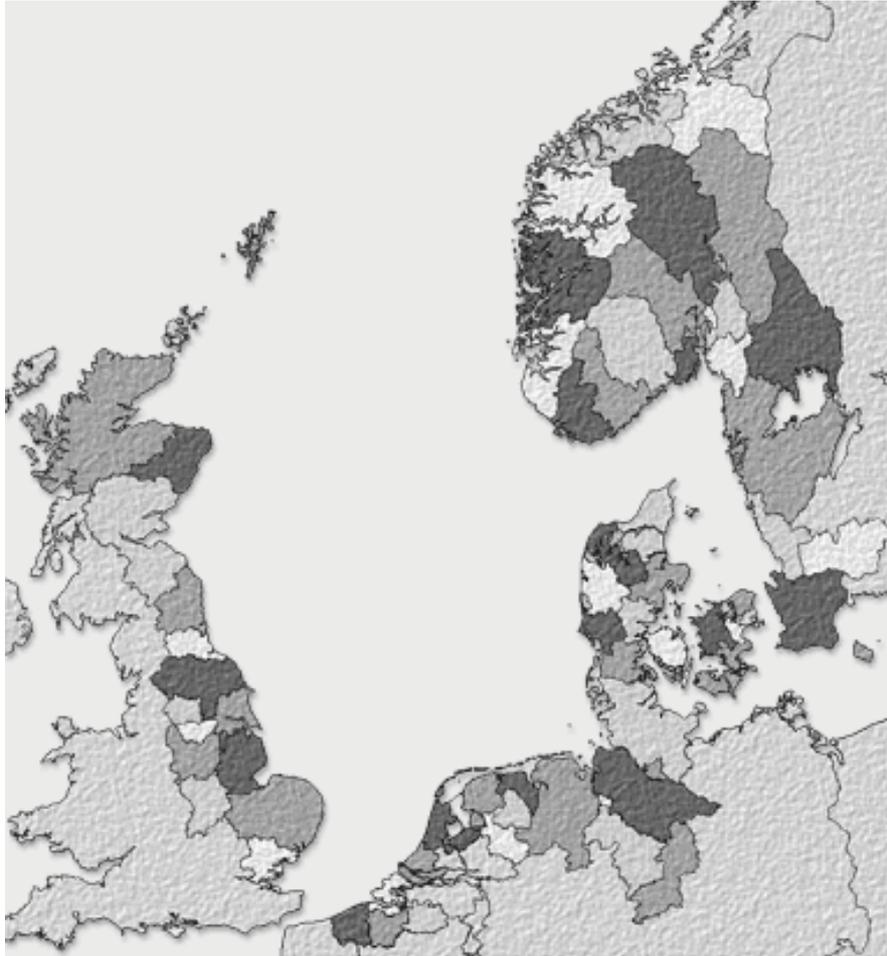
Figure 2.1: Eligible area of the NSR (http://www.interregNorthsea.org/Eligible-Area-g.asp)

General Information

The population of the whole NSR is just over 58 million (excluding the major cities: 51 million inhabitants), living in an area of more than 500,000 km². More than 10% of them are living in major cities or nearby even though the major cities include less than 10,000 km² which is less than 2% of the NSR.

The importance of the NSR for the countries which border the North Sea is quite high. More than 33% of the area of all bordering countries belongs to the NSR. The share of population in this region on the whole population of all countries is with more than 27% still important.

The considered regions are rather heterogeneous. The population differs between 15 million people in the United Kingdom (29% of all inhabitants in the NSR) and less than 3 million people in Norway (6% of all inhabitants in the NSR). The average of 7.3 million inhabitants per country is reached by three countries (UK, DE and NL) which include nearly 70% of all inhabitants.

The fact that two countries (UK, NO) make nearly 60% of the whole area of the eligible area underlines the heterogeneity of the countries among each other even more. In contrast to this the NSR area of Belgium includes not even 2% of the whole NSR.

Concerning population density there is a sharp South-North contrast in the NSR. Nordic countries like Sweden and Norway have a remarkable low population density, which is significantly below the European average of 102 inhabitants per km². Compared to this, the Southern countries of the NSR have a rather high population density. Belgium, the smallest country of the whole NSR reaches even a population density which is nearly five times the average (465 inhabitants/km²).

The description of the NSR on the national level can be transferred to the lower levels as well. Especially on the level of NUTS 1 there are still vast differences among the countries concerning population and area. The population density still remains in the sharp South-North contrast already mentioned above.

Regarding the NUTS 3 regions in the NSR with direct access to the sea, the whole population is just above 28 million[3] people representing 55% of the whole population of the NSR. The fact that these 55% of all inhabitants live in an area which makes 85% of the whole area of the NSR shows that the inland of the NSR is much more densely populated than its coast (average number of inhabitants/km² on NUTS 2: 102, on NUTS 3: 66).

To be able to assess the relative importance of tourism in the NSR the tourism intensity[4] was used in the report. It indicates the number of beds per 1,000 inhabitants.

The tourism intensity in the eligible area is 17.1 bed-places per 1,000 inhabitants. Regarding the national level, the only country with significant higher tourism intensity is Norway with 34 bed-places per 1,000 inhabitants. Analysing the tourism intensity on the different levels there is a strong connection between tourism intensity and population density: The regions with the highest tourism intensities are sparsely populated.

The average tourism intensity in the NUTS 3 regions with direct access to the sea is with 19 bed-places per 1,000 inhabitants little higher than the average tourism intensity in the NSR (17 bed-places per 1,000 inhabitants). This aspect shows that the relevance of tourism in the regions with direct sea access is becoming more important the fewer the number of inhabitants is.

Labour Market and Economical Information

The structure of the labour market in the different countries is very homogenous. Like in most European industrialised countries the percentage of the people who are employed in the service sector is around 70% while around 25% of the working population is employed in the industrial sector. The percentage in the agricultural sector is in all countries very low. It rates between 3.2% in Denmark and in the Netherlands and 1.7% in the United Kingdom. In contrast to the very similar structure concerning the employment in the different countries, the unemployment rates differ widely between the nations. With unemployment rates higher than 10% of the whole working population in several German regions these rates are nearly twice as high as in other regions in the NSR. In the whole eligible area around 6% of the total working population are without a job.

On the level of NUTS 1 the highest importance of the service sector can be found in the Netherlands. More than 76% of the employed population in West-Netherland is working in this sector followed by 75% in the British regions Eastern and Scotland. The loWest importance of this sector of the economy can be stated for the German region Lower Saxony with just above 68%. The unemployment rate (10.5%) in this region is the highest in the whole NSR on the level of NUTS 1 which can be justified by the cities of Hanover (10.5%) and Brunswick (11.6%) which both lie within Lower Saxony.

Besides the situation of the population in the different countries it is also important to know about the different dimensions of the economy and the structure of the population.

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[3] excluding cities with more than 500,000 inhabitants and an area of less than 530 km² (København og Frederiksberg Kommuner, Københavns amt, Agglomeratie 's –Gravenhage, Tyneside, Oslo)

[4] tourism intensity= bed-places/1000inhabitants

Table 2.2: Labour market - national level**(Eurostat; no data for Norway available, **the numbers displayed are calculated for the NSR without the major cities/regions on the level of NUTS 2 - see also the part in this chapter "General information")

		Population 2004 (in 1,000)	Employment (15 years and older) 2005				Unem- ploym. rate 2005
			total (in 1,000)	agri- culture (%)	industry (%)	services (%)	
	Eligible area	**51,460**	**23,444**	**2.7**	**23.8**	**72.4**	**6.0**
uk	United Kingdom	15,061	7,237	1.7	24.2	73.7	4.5
de	Germany	10,823	4,626	3.7	26.6	69.7	10.4
nl	Netherlands	9,598	4,770	3.2	17.8	74.3	5.0
dk	Denmark	5,401	2,752	3.2	23.9	72.8	4.8
be	Belgium	4,187	1,802	2.3	28.9	68.8	5.4
se	Sweden	3,409	2,256	2.9	25.0	71.9	5.4

Due to missing data at the regional level, the data refers to the whole national level and not only to the eligible area.

The economic structures of the countries are very similar to each other. The share of the service-sector dominates the economy. In every country this sector makes more than 2/3 of the whole Gross Domestic Product (GDP). Around 1/4 of the GDP is earned by the industrial sector, while agriculture, fishing, mining and forestry are rather unimportant.

The country with the highest GDP is Germany. With more than 2 billion US $ the GDP is more than 10 times higher than the GDP of Denmark. Besides Germany and the UK all of the countries have a GDP of less than half a billion US $).

The percentage of the urban population (= population density higher than 500 people per km²) varies between nearly 100% in Belgium and 76% in Norway. With regard to the demographic change, the age structure of the population in the different countries is important for the further development of the countries as well. At the moment Germany has the "oldest" population structure of the seven countries. It has the loWest percentage of children up to 15 years and the highest percentage of people who are 65 years and older. In contrast to this, the Norwegian population is very young. Nearly 20% are younger than 15 years and no more than 15% are older than 65 years. Concerning the development in tourism it is a very important aspect because of the changing demands of the travelling population (DZT 2007).

Travel Behaviour

The travel behaviour of the inhabitants in the NSR is an important aspect for tourism in the region. The knowledge of the source market allows a more precise coordination of the marketing and the developing processes. Because of the difficulty to obtain data on these aspects, the analysis will remain on the national level and considers the whole country, not only the NSR.

As indicated in several studies, a large number of travellers choose either a nearby country or a destination within his or her home country as a holiday destination. Considering this fact, there is a high importance of the travelling population for the NSR because the regarded countries are all bordering each other.

As the statistics show, most of the popular holiday destinations of the inhabitants in the NSR are nearby countries. Apart from Spain and France, the neighboured countries are the destinations best liked. Except for the United Kingdom, the considered countries chose each other for their holiday destination (DZT 2007). The British prefer the USA and Ireland.

Regarding the average length of stay, a significant North-South contrast becomes obvious. People from Scandinavia travel for shorter periods and less often than people from the other countries in the NSR. Concerning their expenditures during their trips it can be stated, that the Scandinavians (e.g. Norwegians: Euro 162/night in 2004) are willing to spend much more money per night than for example the Belgians (Euro 65/night in 2004) (DZT 2007).

Tourism Development – Supply of Hotels and Similar Establishments

After having described the general surrounding influences on tourism in the NSR, influencing aspects like supply and demand will be assessed hereafter.

Because of the limited data comparability concerning the parameters in tourism (see Chapter 2.1.2) the tourism supply in the NSR is mainly analysed on the basis of "hotels and similar establishments". The available data for these establishments are more comparable and complete than for other forms of accommodation like holiday dwellings or campsites. They will be analysed separately under the term "other establishments".

The eligible area provides a tourism capacity of more than 22 million hotels and similar establishments with a total of nearly 0.9 million bed places. With around 60% of all establishments and 32% of all bed places the United Kingdom provides by far most of the accommodation supply in the NSR. The number of hotels and similar establishments in the other countries differs from 5,204 establishments in Germany down to 480 establishments in Denmark. Concerning the bed places Germany follows the United Kingdom with nearly 200,000 bed places while the not even 50,000 bed places in Belgium are the minimum number of bed places in the NSR. One reason for these partially enormous differences concerning the supply between the countries has to be seen in the different cut off points of each single nation (see Chapter 2.1.1). This becomes obvious as well when regarding the average size of the establishments: while the average number of bed places per hotel or similar establishment in Denmark is about 146 bed places, the average size of British hotels and similar establishments is 23 bed places per establishment (average of the eligible area: 39 bed places/hotel and similar establishment).

The general tendency of this evidence does not change at the level of NUTS 1 and NUTS 2. The areas with the highest number of bed places will remain mostly in the United Kingdom, Germany and the Netherlands. The countries show enormous differences within themselves: as well as the TOP 20 areas on the level of NUTS 2 are dominated by British, German or Dutch regions, six of the bottom 10 places concerning the bed places come from these three countries as well.

The occupancy rate varies between the regions. In the 20 NUTS 2 regions with the highest bed-place capacities the variation is between 61% in Eastern Scotland (disregarding the figure of 100% in West Yorkshire as highly unlikely) and 27% in Hedmark og Oppland. The average occupancy rate of the NSR is around 35%. There are also differences between the regions of one country. Every country has regions on NUTS 2 level with high occupancy rates and at the same time regions with rather low occupancy rates. As the regions with rather high occupancy rates are structured differently, there is no general connection e.g. between occupation rate and population density: Urban areas like Eastern Scotland or Noord-Holland show similar occupancy rates as rather rural regions like highlands and islands.

Table 2.3: Capacities 2005 – national level** (Eurostat,* UK 2005 numbers are from 2004, **the numbers displayed are calculated for the NSR without the major cities/regions on the level of NUTS 2 - see also the part in this chapter "General information")

Total figures – hotels and similar establishments		Establishments	Bed-places	Ø Size	Ø Occu-pancy rate (%)
	Eligible Area total	**22,701**	**894,813**	**39**	**35.2**
uk	United Kingdom*	13,065	287,729	22	35.8
de	Germany	4,838	192,778	40	31,2
nl	Netherlands	2,023	130,345	64	44.7
no	Norway	853	101,996	119	30,5
dk	Denmark	480	69,932	146	39.6
se	Sweden	636	63,263	99	47.9
be	Belgium	806	48,770	61	33.5

The breakdown of the occupancy rates to the months of the year shows the importance of the summer season in the NSR. Even though the data is available only at the national level, the curves give a good overview of the importance of the different seasons (Fig. 2.2).
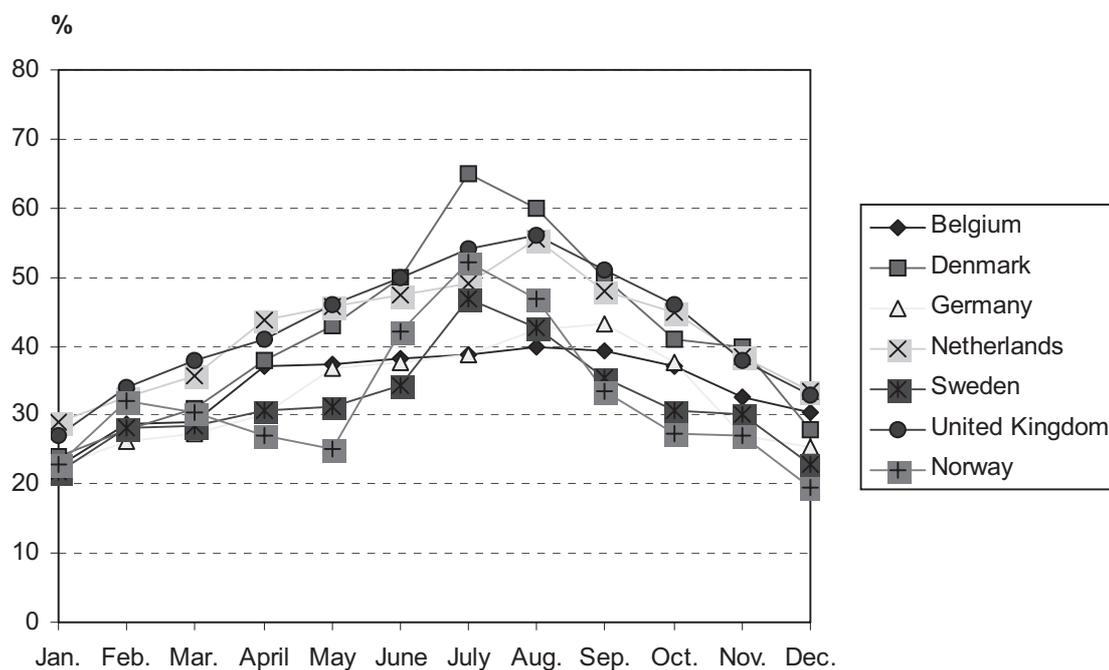
Figure 2.2: Monthly average occupation of bed-places 2005 (Eurostat)

The monthly occupancy rate development of the Scandinavian countries shows differences to the other countries. During the summer season, the percentage of the use of bed-places is rather high compared to the rest of the year. For the other countries the summer is the most important season as well, but the distribution over the rest of the year is more balanced.

Regarding the number of bed-places in the areas at the level of NUTS 3 with direct access to the sea, a high importance for the whole NSR can be stated. Even though the major cities have been excluded from the calculation at this level the areas account for nearly 15,000 establishments and 550,000 bed-places. With more than half of the bed-places and nearly 2/3 of all establishments in the NSR the importance of tourism in this region becomes once more obvious.

The distribution of bed places at the level of NUTS 3 shows a similar tendency towards the ranking of the bed-places. The British regions remain the ones with the highest number of bed-places. But instead of Germany and the Netherlands more of the TOP 20 ranking places are distributed to Sweden and Norway. Most of the 10 regions with the lowest number of bed-places can be found in the United Kingdom and in Germany. As well as on the national level the average size of establishments differs widely between the Scandinavian countries and the other countries. Only few of the Scandinavian establishments have less than 100 bed-places while the average size of the establishments in the other countries is never higher than 90 bed-places.

The occupancy rates for these areas could not be calculated because of partially missing data of the arrivals at this level.

The development of the bed-places in the NSR has been considered both, for the long term (1995-2005) and for the short term (2000-2005). The long term development of the bed-places in the different nations of the eligible area is generally positive. The number of bed-places in Denmark (+16%), Norway (+11%) and Germany (+8%) increased significantly. Only Belgium showed a small decline of -2% during this period. For the other countries no data for 1995 was available.

The short term (5 year) development shows a similar trend: the overall capacities in bed-places in the NSR grew by 7% or more than 60,000. The highest growth rates could be found in Denmark (+13%), the Netherlands (+11%) and the UK (+9%). In all other countries the number of bed-places remained stable with growth rates between + 3% (Sweden) and -3% (Belgium). With Belgium being the country with the fewest bed-places in the NSR this decrease means only 1,500 bed-places less than in 2000.

Comparing the long term and the short term development for those countries we find that in Denmark most of the growth happened in the last five years, whereas most of the increase in Norway and Germany was between 1995 and 2000. Belgium had even a small increase in bed-places from 1995 to 2000, so the small decrease happened in the last 5 years.

The development of the bed-places at the different levels of NUTS 1 and NUTS 2 is independent from the number of bed-places in the regions which means that areas with a high number of bed-places can show a complete different development than other regions with about the same number of bed-places. For example the number of bed-places in areas like Eastern Scotland with a medium number of bed-places (37,658 bed-places in 2005) increased from 2000 to 2005 by 25% while the number of bed-places in Västsverige, a region with similar conditions concerning the bed-places, increased by only 4% during the same time.

The trend which can be stated for the NSR concerning the development of bed-places during the period from 1995 to 2005 is that most of the areas showed a higher increase of bed-places in the second half of the 90es than from 2000 to 2005.

Table 2.4: Capacities 1995-2005** – national level (Eurostat,* UK 2005 numbers are from 2004, **the numbers displayed are calculated for the NSR without the major cities/regions on the level of NUTS 2 - see also the part in this chapter "General information")

Total figures – bed-places – hotels & similar est.		1995	2000	2005	95-05	00-05
	Eligible Area total		850,425	894,813		+5%
dk	Denmark	60,080	62,107	69,932	+16%	+13%
nl	Netherlands		117,863	130,345		+11%
uk	United Kingdom*		259,445	287,729		+12%
se	Sweden		61,528	63,263		+3%
no	Norway	97,464	101,780	101,9967	+11%	+2%
de	Germany	186,404	197,493	192,778	+8%	+1%
be	Belgium	49,681	50,209	48,770	-2%	-3%

Table 2.5: Demand 2005*** - national level (Eurostat,* UK 2005 numbers are from 2004, ** Swedish numbers from Statistics Sweden, ***the numbers displayed are calculated for the NSR without the major cities/regions on the level of NUTS 2 - see also the part in this chapter "General information")

(total figures)		Arrivals		Nights spend		Ø Length of stay (nights)	
		total	% Non-residents	total	% Non-residents	total	Non-Residents
Eligible Area total		62,485,759	28.7	136,787,677	30.1	2.2	2.3
uk	United Kingdom*	16,926,743	15,4	46,936,548	20.7	2.8	3.7
de	Germany	13,542,875	14,8	29,236,011	13.7	2.2	2.0
nl	Netherlands	11,631,300	57,6	21,286,900	59.1	1.8	1.9
no	Norway	9,226,475	25,2	15,405,987	28.0	1.7	1.9
dk	Denmark	3,252,675	41,5	10,115,210	47.3	3.1	3.5
se	Sweden**	4,916,867	21,0	7,837,142	23.9	1.6	1.8
be	Belgium	2,988,824	65,1	5,969,879	65.2	2.0	2.0

Tourism Development – Demand for Hotels and Similar Establishments

The tourism demand in the NSR accounts for 54 million arrivals in 2005 with more than 115 million nights spend. The vast majority of tourists in the NSR (70%) are residents of the country they spend their holiday in, 30% are tourists from abroad.

The analysis of the national level gives an overview of the general division of the market. The United Kingdom, the country which provides most of the capacities, is the country with the most arrivals as well. More than 1/4 (15 million) of all arrivals are represented by arrivals in the UK. Germany follows with a little less than 1/5 of all arrivals (10 million). Analogue to the capacity of bed-places these two countries account for about half of all arrivals in the eligible area. Next in line are the Netherlands followed by Norway, Denmark, Sweden and Belgium (Table 2.5).

The country with the highest percentage of non-resident tourists is Belgium. Nearly 2/3 of all people, who are spending time in this country do not live there. Together with the Netherlands with nearly 60% arrivals of non-residents, these are the two countries in the NSR where foreign tourists dominate the market. In Denmark (42% of all arrivals) Norway (23%) and Sweden (21%) incoming tourism still plays an important role. The two biggest markets concerning supply and demand, the UK and Germany are mainly focussed on the domestic market.
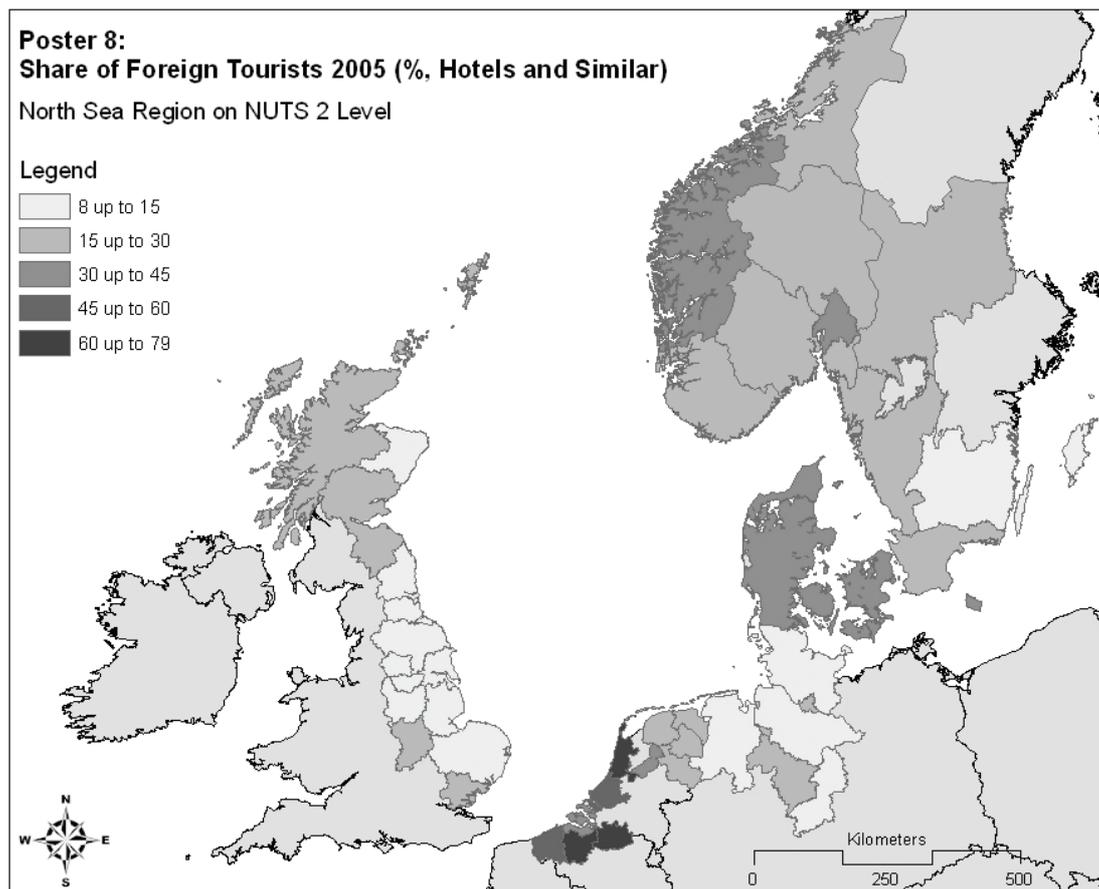

Figure 2.3: Share of foreign tourists in the NSR 2005 (map: CAU Kiel; data: Eurostat)

On the level of NUTS 2 the number of nights spent differs widely. For example Noord-Holland, the area with most of the nights spend in the NSR, accounts for nearly 12,000 nights spend in 2005. Together with Denmark, which is still the whole country on the level of NUTS 2 they make 20% of all nights spend in the NSR. Because of the length of stay, which is nearly twice as long in Denmark (3.1 nights) as in Noord-Holland (1.8 nights), the number of arriving tourists in Noord-Holland is accordingly higher. The area with the loWest number on all nights spend is the Dutch area Flevoland. With less than 100.000 nights spend in 2005, they account for less than 0.2% of all nights spend in the NSR.

Among all guests the average length of stay is 2.1 nights. 18 of the 38 NUTS 2 regions show a longer duration of stay. The regions with the highest length of stay are all among the areas with the highest number of guest nights. Most of the regions with durations of stay above average are located in the United Kingdom. The regions with the shortest length of stay can be found in Norway and Sweden.

As well as the data of the tourism supply, the tourism demand shows a positive trend during the last 10 years (1995-2005). Even though the development of the nights spent is very different in the countries, there is no nation without a negative development. With a growth of around 3% concerning the nights

spent in the last 5 years, the importance of the NSR as a tourist destination seems to be consolidated. The highest growth during this period can be stated for Sweden (+60% on nights spend) followed by Belgium and Denmark.

The findings of the analysis in the NSR show a tendency of quite considerable growth in demand in the years 1995-2000 and a stagnating growth of this trend in the years 2000-2005. Especially in these last 5 years the development in the NSR differs very much from region to region – with considerable growth for some and significant losses for others.

Tourism Development – Supply and Demand for other Establishments

Due to the different definitions in the countries (see Chapter 2.1.2) the comparability of the other establishments like holiday dwellings or campsites is rather limited. Nevertheless it is important to keep these forms of accommodation in mind because of its significant relevance for the NSR.

With more than 20,000 establishments and more than twice as many bed-places as the hotels and similar establishments in the NSR, the importance of these accommodations is very high. Similar to the hotels most of these capacities are located in the United Kingdom. The importance of the other establishments differs widely between the different nations. In Denmark, this kind of accommodation makes 55% of all establishments in the country, while in Belgium the share does not exceed 40%.

Concerning the number of bed-places, nearly 40% of the total capacity is located in the more or less rural areas Denmark, Schleswig-Holstein, Västsverige, Weser-Ems and Zeeland. In the major cities, the importance of this kind of accommodation is negligible.

As with the capacities the importance of the other establishments and the private sector for the tourism demand is of significance as well. With nearly 56 million arrivals and 135 million nights spend this kind of accommodation is at least as important as the hotels and other establishments in the NSR.

Almost 50% of the arrivals are in Germany, followed by Sweden, the Netherlands and the United Kingdom (each 11-13% market share on arrivals), Norway (8%), Denmark and Belgium (4% each).

Most of the time the share of non-resident guests in the eligible area in this category is lower compared to hotels and similar establishments. Only 1/5 of all arriving guests in the NSR come from abroad. Belgium is the exception, with more than 50% of all arriving guests' foreigners belonging to one of the main target groups.

Integration and assessment of results

The total population of the NSR is just over 51 million living in an area of around 500,000 km². Like in most Western European countries the percentage of the people who are employed in the service sector is around 70% while around 25% of the working population is employed in the industrial sector. The average unemployment rate is around 6%.

Worldwide tourism is a booming industry. From 1995 to 2005 the number of worldwide international arrivals grew almost by 50% from 540 million to more than 800 million. Europe is the most important destination, accounting for more than half of the world's international arrivals. The NSR plays an important role in European tourism even though Southern and Western Europe have considerably higher shares of international arrivals.

Looking at the tourism development in the NSR at the national level, the ranking according to supply and demand indicators is closely linked to the size of area and population of the countries: the UK leads these rankings followed by Germany, the Netherlands, Norway, Denmark, Sweden and Belgium. Already at this level you can see differences between the different countries in their tourism structure: E.g. the UK and Germany with the smallest establishments and the least international guests, Belgium and the Netherlands with a high importance of foreign tourists, Norway, Denmark and Sweden with much bigger establishments than in the South of the NSR.

Going more into detail at the NUTS 2 level, you also find a very heterogeneous picture of tourism development in the NSR. All in all, the generally positive trend in tourism supply and demand is very unevenly distributed throughout the regions. Also, there seems to be the tendency in the NSR of quite considerable growth in demand in the years 1995-2000 and a slowing of this trend in the years 2000-2005. Especially in these last 5 years the development in the NSR differs very much from region to region – with considerable growth for some and significant losses for others.

The analysis presents a sound basis for the 'Transnational review of the current situation in the NSR'. It produces for the first time an overall picture of the tourism-development in the eligible area of the NSR and allows a fast comparison of the tourism-development of regions in the NSR with consideration of the described indicators. But as can be seen in the following chapter, the official statistics, on which this analysis is based, is not sufficient to draw a complete picture of the situation of tourism in the NSR region. To get more detailed information it is necessary to go down to the regional level and get information beyond the official statistics. In the ToLearn project this information was gathered in the Challenge Profiles which will be analysed in Chapter 2.2.

2.2   Structure and Development of Tourism in the NSR

After having analysed tourism development in the NSR on a statistical basis, this chapter will analyse the actual situation in this area on the basis of the Challenge Profiles (Drews 2008; Hergesell & Blichfeldt 2007; Hoffmann 2008; Januszewska & Viaene 2007; Mykletun 2007; Postma 2007; Schmücker 2007; von Rohr & Hoffmann 2007). The Challenge Profiles were developed by the national partners in cooperation with tourism experts of the country. This means that the data in this chapter is not limited by statistical approaches but goes further into detail and includes the attitudes of the tourism experts towards the situation of tourism in the countries.

The comparison of the different regions is supposed to emphasise the structure of supply and demand aspects at the North Sea and to point out similarities and differences between the regions. All the information used was gathered by interviewing tourism experts and desk research of the partners. More detailed information can be found in the Challenge Profiles of the different countries compiled in the appendix volume *ToLearn – Background Investigations*.

2.2.1   Who Spends their Holidays at the North Sea?

Target Groups

One of the main target groups along the whole North Sea shore are families with children. In every country along the coast families with children belong to the main target groups, or even represent the main target group themselves. In most of the countries they are part of the long-established target groups and their share in tourism is stable or even rising. Among the tourists in Denmark, they form the largest fraction of tourists. Their share on all overnight stays in 2006 represents more than 50%. For Germany and Sweden, families with children are the most important target group, too. In the other countries they are also rated as highly important even though they are not the main target group.

Even though families with children are one of the most important target groups of the NSR, this target group is less important for single regions within the countries. In the Netherlands, for example in the area in the Southwest of the country the importance of families with children is rather low even though their share on all tourists is slowly increasing. In the North and Northwest Netherlands families belong to the most important target group. The same in Norway and the UK: In Haugalandet (NO) and North East (UK) families are highly important for the tourism sector, while their significance in the other regions is rather low.

Another highly important target group for the NSR are the older couples without children. Like families with children their share of all tourists in the region has remained at a high level for a long time already. Even though the definitions of this target group differ between the countries, the general importance becomes obvious. In all countries[5] they belong to the most relevant target groups for the tourism industry as well as the families with children. Because of the high growth potential for the future tourism development seen by many countries of this target group is regarded as highly important for the tourism industry.

Besides the two mentioned target groups, which account for most of the tourists of the NSR, there are other, smaller target groups, which are important for single regions at the North Sea. Couples without children are one of these target groups, which play a major role in tourism for the NSR. Another target group to keep in mind for the NSR are grandparents travelling with their grandchildren. In Belgium as well as in Lower Saxony, Germany, the share of this target group shows a positive development during the recent years.

Furthermore, business travellers, young people flying in with budget airlines and shopping tourists have to be mentioned as target groups for some regions in the NSR as well.

Next to the aspects mentioned above the income of the tourists plays an important role for segmenting tourism in the regions. Knowing about the circumstances of life and the income of the people who are spending their holidays in the destination, marketing and supply can focus on these aspects and can provide adequate offers for the tourists.

The tourists who spend their holidays in the NSR mainly belong to the medium and upper income classes. Of course there are differences between the different target groups and the countries where they spend their holidays. The fact that families, when compared to other target groups, belong to a rather low-income group may be surprising, even though every destination would like to attract families with a higher income.

Origin of Tourists

The importance of foreign tourists in the NSR differs widely between the nations. The highest share of foreign tourists on all guests can be found in Denmark. Around 60% of all tourists come from abroad. In other countries like the Netherlands, Norway and Germany the importance of foreign tourists is relatively low.

In most of the countries in the NSR the main share on foreign tourists is generated by the neighbouring countries. Especially the share of German tourists in Denmark and Norwegian travellers in Sweden is very high. The United Kingdom is an exception in this respect due to its isolated island location. There, the most important countries of origin of the foreign tourists are the United States followed by Germany and Spain.

Importance of Day Trips

Besides holiday tourism, day excursions play an important role for the tourism industry in the NSR. In some countries the importance of day trips is even higher than the importance of residential tourism. Especially outside the main season the importance of day tourists becomes obvious. As with all the other aspects of tourism, the relevance of day tourism differs widely between the countries within the eligible area. Even within the different regions of one country, the ratio of day tourism and holiday tourism can vary considerably. In the Netherlands, for example, the ratio between holiday tourism and day tourism varies between 1 holiday tourist to 21 day tourists in the Region Ijmond including the city of Amsterdam and 1 holiday tourists to 0.5 day tourists in the Wadden area. In the United Kingdom, the segment of day tourism is also highly important for the tourism industry. More than half of the

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[5] no data available for Norway

spending there is generated by day tourists. In some regions like North East or Lincolnshire the ratio between the arrivals of holiday tourists and day tourists reaches dimensions like 1 to 8.6 (North East).

Although day tourism in Sweden accounted for only 30% of the annual volume of visitors in 2004, this segment supports all year tourism. While most of the overnight tourists come during the summer months, day tourists come throughout the year. Outside the main season the importance of day tourism is even higher than overnight tourism. In the NSR day tourism is the fastest growing segment in tourism.

In Germany and Belgium the ratio between day tourists and overnight tourists is almost balanced. In Germany the number of guests in the two segments is nearly the same, while the spending of the day tourists is about twice as high as the spending of a holiday tourist per day.

For Denmark and Norway data concerning this aspect is not available.

2.2.2   North Sea Tourism: Attraction Points

To complete the picture of tourism in the NSR the supply of the region has to be analysed. The only way to find out about similarities between the regions themselves is to outline the determining aspects of tourism in the areas.

Natural and Grown Attractiveness

Nature and landscape belong to the most important reasons to decide for a holiday destination. Even though all of the regarded areas border the sea shore the nature in the regions differs from each other. One of the main reasons for choosing a holiday destination at the North Sea is the proximity to the water and the sea shore and with it the possibility to go swimming. Because of the different types of coastline the opportunity to do this is not necessarily given.

In the considered areas the possibility to go to the beach and to go swimming is given in every country at least in a few regions. It is one of the main reasons for choosing these destinations.

The landscape around the North Sea varies among the individual countries and within the countries to great extent. Along the North Sea shore in Belgium, the Netherlands, Germany and Denmark the landscape varies between dunes with sandy beaches and dikes or similar coastal protection arrangements. The sea shore in Norway and Sweden is dominated by cliff coast sections with rocks and sandy beaches in between. These beaches are the main attractions in the region. Even though the bathing season in these countries is rather short, to go swimming is one of the main reasons people are spending their holidays there.

Characteristics of the British coast are long sandy beaches taking turns with cliff lines. In Scotland, the cliffs are dominating the landscape. In the South the sea shores with its beaches are much more important for tourism than in the North. In Scotland and the Northern part of Britain, the tourists are more interested in the landscape and the culture of the inland.

Activities

The importance of water related activities away from the beaches such as sailing is moderate to low for the whole NSR. In some countries, though, like in Sweden to go sailing is one of the most popular activities. For example, 25% of all tourists in the study area of Southern Sweden use the possibility to go sailing during their holidays. This region is the most popular area for sailing in the whole country. Around 50% of all boat nights in Sweden are generated in this region.

In the other countries there are options for water related sports as well, but they are not that important as in Sweden. In Norway kayaking and boat trips in general are quite popular. In Belgium, the Netherlands, the United Kingdom and Germany there are leisure ports along the whole shore as well

but there was no data available concerning the importance of these possibilities for tourism. Still, the Netherlands together with Sweden are countries where hiring sailing boats during the holidays is popular.

Other activities like cycling, hiking or day trips to points of interest, however, are very popular all over the countries of the NSR. Especially cycling is one of the favourite activities in the NSR. In nearly all of the countries cycling during the holidays is developing positively. Norway and Denmark for example worked out concepts for example on bicycle tourism to meet the needs of the cyclists. In Denmark the bicycle concept belongs to a project to develop quality criteria, products and marketing plans on the themes cycling, fishing, golf, wellness and gastronomy. In Sweden cycling is one of the most popular activities as well even though it will never reach the popularity of water related activities and shopping.

Especially in the Scandinavian countries it becomes obvious that the people going there on holiday are more interested in nature and nature related activities than in the culture of the countries. Because of the much broader cultural offer at home, culture is not the main selling point in these regions. Nevertheless cultural attractions receive many visitors. In contrast to Sweden the tourists in Belgium judge cultural activities as an integrated part of the tourism product in the country.

Tourism in the United Kingdom is rather focussed on cultural heritage sights. Beside the good conditions for cycling and hiking, visiting cultural attractions like castles and old towns as well as the countryside are the most popular activities in this country.

Accommodation

In general, the structure of accommodation is quite similar among the different NSR countries. Holiday homes, smaller and medium-sized hotels are the most abundant type of accommodation while large and/or luxury hotels are rather scarce. Even though the overall tourism structure has a focus on holiday homes and smaller hotels, the development within the countries concerning the type of accommodation is different.

A sharp increase of Bed & Breakfast accommodation in the Netherlands compares to slightly increasing numbers in Norway or even decreasing numbers in Germany. In the United Kingdom, this segment shows a stable performance during the last years.

The share of small and medium-sized enterprises for the tourism industry in most of the regions in the NSR remained more or less stable for the last years even though the overall significance differs from country to country. In the United Kingdom small and medium-sized hotels remained the most important type of accommodation over the last few years. In countries like Denmark and Norway, on the other hand, this segment is not very well established. There are of course hotels but compared to rented holiday houses, their share is very low in these countries. In the other countries like Belgium, Germany and the Netherlands there is a demand for this kind of accommodation, but the shares, which remained stable or were slightly decreasing during the last years, are not likely to face a sharp increase in the near future.

Large hotels and luxury offers do not have a large share in the accommodation sector in the NSR. Only very few countries offer this kind of accommodation, even though there is an effort to raise the number of high quality accommodation in the hotel sector in the next years.

The most important type of accommodation in nearly all of the countries in the NSR are rented holiday houses. In Denmark, around 50% of all nights spend are spent in rented holiday houses and it seems as if the number will remain at this high level in the future as well. No other country in the NSR has such a high share of this kind of accommodation. Despite the high importance of holiday homes in the Netherlands and Belgium, the demand for this kind of accommodation is still rising. In Belgium there is a large supply of holiday homes; mostly these are owned by private persons instead of belonging to commercial companies. In the Netherlands the demand for holiday homes for rent is

rising as well. Especially larger, 3-generation-houses are increasingly demanded. In Germany holiday homes are spread all along the coastline and are highly demanded by the tourists in the region. Even though this segment is very important for the tourism industry in Germany, its share of all nights spent has been decreasing very slowly during the previous years. In Norway holiday homes are an important part of the tourism sector as well with increasing tendencies in the future. In Sweden the importance of holiday homes is very high as well. 20% of all visitor nights are spent in leisure residences. Most of the people spending their holidays in such an accommodation are the Swedish themselves while a lower share comes from abroad.

In most of the countries within the NSR integrated holiday worlds (e.g. Center Parks) are of little importance. In Sweden and Norway, there are no such facilities reported. In Germany there is an approach in Lower Saxony to establish this kind of holiday accommodation but the share on all nights spent is slightly decreasing. In Denmark the share on all nights spent in this kind of accommodation is slightly decreasing as well. But it is expected to face an increasing demand for this offer for short holidays in the future because of its facilities and services. Around 12% of all bed places are organised in holiday parks in Belgium. Some of the holiday centres with extended supplies are going to head towards a reorientation to second home parks without houses for rent for tourists.

Competitiveness

All countries around the North Sea are aware of the competitive situation among the destinations of the NSR and the Mediterranean Sea. Unstable weather conditions combined with relatively high prices in the NSR are confronted with the sunny and often cheap holiday offers in the South. Besides the weather conditions, the reduction of the flight costs is seen as a major challenging factor. The development of the countries around the Mediterranean Sea concerning quality and services enforces the situation. But the Mediterranean region is not the only strong competitor in the tourism sector. The Baltic Sea region has developed to be a competitor in tourism which is to be taken seriously in the Netherlands and Germany. Even the long-distance destinations become more and more interesting as a holiday destination due to the declining costs of flying. Norway does not foresee a real chance to win the competition against the destinations in the South. Travelling to the North is an alternative for only a minority of travellers.

Qualification of Staff

The qualification of staff is one of the main problems in the NSR. All over the region there is a high demand for workforce during the summer months while the need for labour in tourism business is rather low during the low season periods.

In most of the countries this problem is solved by employing seasonal workforce. In the summer time the lack of qualified staff is compensated for by employing students or foreigners looking for a summer job or wanting to gather experiences abroad. Most of them are not qualified to meet the increasing demand for quality services. Because of their short duration of stay the costs for training would often not pay off for the employing establishments. The short of time of stay also prevents qualification measures for this "secondary workforce".

In contrast to the seasonal workers who can be easily recruited it is hard to find experienced staff. Experienced staff is more expensive and most of them are not willing to be employed just for the season. In Germany the qualified staff leaves often prefers to work in the South because of the stronger and more extensive winter season. In the South they have a better chance to be employed for the whole year instead of for the season only.

Another problem is the qualification of the entrepreneurs of small and medium-sized enterprises. Many of them can not earn their living from their businesses so they have to run other businesses as

well. This situation leads to less time and motivation for further training to improve the service quality of the enterprise.

2.2.3 Extent, Structure and Development of Tourism: Similarities and Differences of the Coastal Regions in the NSR

The analysis of the Challenge Profiles in the previous chapters is now going to be deepened concerning comparative aspects. To what extend are the analysed regions comparable to each other and in which aspects are they unique in their structure in the NSR? This chapter will mainly focus on these questions so as to help the regions finding comparable partners to learn from.

Because of the very heterogeneous structure of the different regions concerning tourism aspects it will not be possible to find regions which have similarities in every aspect analyzed. Because of this the comparison will focus on the different aspects elaborated in the analysis above:

Demand:

> ➢ main target groups
> ➢ origin of tourists
> ➢ importance of day trips

Supply:

> ➢ natural and grown attractiveness
> ➢ activities
> ➢ accommodation

The competitiveness of the regions and the qualification of staff are key elements for tourism development in the regions as well, but as explained in the preceding chapter, the regions seem to face similar challenges in the future. Because of that, these aspects will not be mentioned in the comparison below.

Table 2.6: Challenge Profiles – summary of comparable aspects "demand"

	Main target groups income of tourists	Importance of foreign tourists/ origin of tourists (Top 3)	Importance of day trips (ratio: holiday tourists-day tourists)
Belgium	• families with children • children with seniors • older couples • singles, couples without children • high income of older tourists, majority along the coast belong to the lower income/education classes	• % of foreign tourists: 54% • Netherlands • Germany • France	• ratio: 1-1.2 • especially important for the whole economy in Oostende, Knokke, De Haan, Koksijde • 18 million day tourists
Denmark	• families with children • middle aged couples • couples spending more money than families	• % of foreign tourists: 60% • Germany • Norway • Sweden	• no data available
Germany	• families with children (medium and higher income) • older couples (medium and higher income) • children with seniors • low & medium income groups as growing segments	• % of foreign tourists: 2% • Switzerland • Austria • UK	• Schleswig-Holstein: economical ratio (holiday tourism - day tourism): 1-0.5 (14 mill. day tourists) • Lower Saxony: number of days spent (holiday tourism - day tourism): 1-0.9 (32 mill day tourists)
Netherlands	• families with children • older couples • younger couples without children • modal to high income of the tourists (NW NL), low income of Dutch tourists increased (SW NL)	• % of foreign tourists: 10% • Germany • Belgium • UK	• North Netherlands: day tourism is more important for the Waddenarea than for the mainland • NorthWest Netherlands: ratio: 1-21 (9.5 mill day tourists) • SouthWest Netherlands: economical ratio: 1-0.7
Sweden	• active families with children • older couples without children	• % of foreign tourists: 26% • Norway • Germany • Denmark	• ratio: 1-0.3 • importance of day tourism is rising • higher importance of day tourism than holiday tourism outside of the main season
United Kingdom	• importance of families with children for few regions • couples without children (DINKS) • older couples without children • high incoming classes	• % of foreign tourists: 5% (Lincolnshire), 25% (North East) • USA • France • Germany	• East of England: economical ratio: 1-1 • Yorkshire: no data available • Lincolnshire: economical ratio: 1-0.5 • North East: economical ratio: 1-1.4 • Scotland/Orkney: no data available
Norway	• families with children (not important in Lysefjorden)	• primarily from Norway • Germany • Denmark • Netherlands	• many day tourists in Jærstrende • no data for the other regions

Table 2.7: Challenge Profiles – summary of comparable aspects "supply" I

	Natural and grown attractiveness	Activities	Accommodation
Belgium	• landscape: dikes, long beaches	• vast possibilities for recreational activities along the beach • options to hire sailing boats • biking is very popular • cultural activities are highly important • presence of unique landscape	• *B&B/small guesthouses:* limited offer in B&B/smaller guesthouses • *small hotels and inns:* decreasing capacities of commercial stay accommodation (39% of all bed places) increasing number of nights spent • *large/luxury hotels:* limited number of luxury hotels, poor infrastructure for congresses, 3* hotels make around 40% of all hotels • *leisure residences:* large diversified supply, low share of commercial forms of stay accommodation comparing to the strong presence of second homes, increasing number of leisure residendes • *integrated holiday centres:* decrease of nights spent, no top quality, reorientation towards second homes without houses for rent for tourists
Denmark	• landscape: dikes, long beaches, dunes	• coastline is the prime pull factor • bathing is very popular • increasing interests in cycling, fishing, bird watching, golfing or wellness • cultural sights are not that important, even though they receive a lot of visitors	• *B&B/small guesthouses:* no data available • *small hotels and inns:* most of them are family run → little time and interest in attending seminars for further qualification, number of bed places remained stable during the recent years • *large/luxury hotels:* limited number of basic hotels, most of them are rated with 3 or 4* • *leisure residences:* half of all nights spent are spent in holiday houses, share remains stable for a long time • *integrated holiday centres:* range of holiday centres with huge entertainment programme, increasing importance because of shorter holidays, share on all nights spend equals the share on all nights spent in the hotels

Table 2.8: Challenge Profiles – summary of comparable aspects "supply" II

	Natural and grown attractiveness	Activities	Accommodation
Germany	• landscape: mainly dikes, some long beaches, dunes on the islands	• coastline is one of the prime pull factors • cycling is very popular • points of interest are nearby (cultural and activities)	• *B&B/small guesthouses* Schleswig-Holstein: low occupancy rates, declining no. of bed places; Lower Saxony: no. of nights spent is decreasing, no. of bed places increasing, share of 20% of all nights spent; • *smaller hotels and inns:* Schleswig-Holstein: low occupancy rates, declining no. of bed places Lower Saxony: share on all nights spent: 30%, number of bed places in all hotels is slightly increasing • *large/luxury hotels:* Schleswig-Holstein: increasing number of bed places Lower Saxony: little importance, comparable high importance on some islands (around 10%), tendency towards more quality, more upper class offers • *leisure residences:* Schleswig-Holstein: no. of holiday flats remains stable, no. of holiday homes is slightly increasing Lower Saxony: share on all nights spend 20%, slightly decreasing • *integrated holiday centres:* Lower Saxony: trend towards integrated holiday centres, share on all nights spent remains stable/is slightly decreasing
Nether-lands	• landscape: dikes, long beaches and dunes	• bathing and boating is very popular • possibility to hire sailing boats • cycling is very popular	• *B&B/small guesthouses* North Netherlands: sharp increase in demand SouthWest-Netherlands: small increase of B&Bs • *smaller hotels and inns:* North Netherlands: demand for hotels might increase if the Asians come, slight increase of bed places at the moment • *large/luxury hotels:* North Netherlands: demand for hotels might increase if the Asians come, slight increase of bed places at the moment • *leisure residences:* North Netherlands: slightly increasing importance, higher increase on the mainland NorthWest Netherlands: growing demand for reunion bungalows (3 generations) • *integrated holiday centres* no data

Table 2.9: Challenge Profiles – summary of comparable aspects "supply" III

	Natural and grown attractiveness	Activities	Accommodation
Sweden	• landscape: coastline with skerries, cliffs and sandy beaches	• bathing is very important • sailing is a very important activity • possibilities to hire sailing boats • high importance of hiking and cycling • low importance of cultural attractions	• no differentiated data available • general trend: rising number of establishments (1993: 73; 2004: 114), stable number of bed places (2.6 mill.)
United Kingdom	• landscape: cliff coast and sandy beaches • Scotland: dominated by cliff coast	• coastline is not that important as the countryside • good cycling, walking and horse riding paths • good possibilities to go golfing • many cultural/historical sights nearby	• *B&B*: Yorkshire: slightly increasing number of overnight trips (2004: 9% of all trips) Lincolnshire: slightly increasing number of bed places (2003: 1,665 bed places) North East: stable share on trips (2004: 8% of all trips) Scotland: share on trips: less than 10% • *hotels/motels and guesthouses*: Yorkshire: slightly increasing number of overnight trips (2004: 29% of all trips) Lincolnshire: slightly increasing number of bed places (2003: 13,094 bed places) North East: rising importance for trips (2004: 30% of all trips) Scotland: share on trips: 38% • *leisure residences*: Yorkshire: stable share of rented houses on all trips (3% of all trips) North East: share of rented houses on all trips varies between 2 and 6% Scotland: number of second homes is rising, particularly on the islands in the West • *integrated holiday centres*: no data available
Norway	• landscape: cliff coast with rocks and sandy beaches • Jærestrende: long sandy beaches	• possibilities for boat trips/kayaking/boat hire • Haugalandet: good cycling conditions, bathing • Lysefjorden: good hiking conditions, points of interest, scenic nature, bathing • Jærestrende: good cycling and hiking conditions, bird watching, good bathing possibilities	• *B&Bs*: Haugalandet: increasing importance • *smaller hotels & inns*: Haugalandet: small hotels are existing, increasing numbers Lysefjorden: very limited accommodation possibilities Jærestrende: small hotels are existing, increasing numbers • *large/luxury hotels*: no large or luxury hotels in any region, only smaller hotels • *leisure residences*: Haugalandet: important part of the tourism sector, increasing numbers Jærestrende: existing and increasing numbers • *integrated holiday centres*: not existing in any region

Comparable regions within in the NSR:

The aspects described in the preceding paragraphs of this chapter outlined some key aspects concerning the tourism structure in the NSR. The description was structured by the topics of demand and supply. In the following sections we aim to compare (pairs of) countries/regions which are similar concerning their basic tourism structures.

➢ **Belgium and Denmark**

Similarities: In both countries families with children belong to the most important target groups with a tendency of decreasing numbers in this segment. The importance of foreign tourists is considerably high: in both countries the foreign tourists make more than 59% of all tourists. The long beaches in both countries are very popular for recreational activities. Cycling and hiking belong to the most important activities. Rented holiday homes are the most important kind of accommodation and there is a large, diversified supply. Smaller hotels and guesthouses play a good role in tourism, even though its importance is smaller than the one of the rented holiday homes. Luxury accommodation is of rather low relevance for tourism.

Differences: Cultural activities are highly important for the tourists during their holidays in Belgium, while the Danish cultural sights are less important. Tourists in Denmark prefer fishing, golfing or wellness instead. Concerning the accommodation in integrated holiday homes, the trend in the two countries is diverging. While the importance of this segment is rising for the Danish tourism industry, the Belgians are going to be reoriented towards second homes without houses for rent.

➢ **North Netherlands (Netherlands) and Schleswig-Holstein (Germany)**

Similarities: The two main target groups are families with children and older couples with modal or higher income. The share on foreign tourists is very low and those guests coming from abroad, come from neighbouring countries. In the Dutch Wadden Sea area the importance of holiday tourists is higher than the importance of day tourists, the same as in Schleswig-Holstein. The coastline is considered as one of the prime pull factors with its beaches and water related activities. Tourists in both regions are highly interested in cycling. In expectation of the rising number of Asians coming to Europe, the demand for hotels might increase in the future in the Netherlands. At the moment smaller hotels in Schleswig-Holstein are facing declining numbers, while the number of luxury bed places is rising. According to the rented holiday homes, both regions show a similar development.

Differences: The importance of Bed & Breakfast showed a high increase in the Dutch region, while the numbers of bed places is declining in Schleswig-Holstein. There are differences within the development of hotels as well.

➢ **Bohuslän (Sweden) and Haugalandet/Haugesund (Norway)**

Similarities: As in most of the NSRs, one of the main target groups in Bohuslän and Haugalandet are families with children. Empty nesters, DINKS and business travellers are important for the tourism industry in these regions as well. In both countries there is a certain amount of foreigners among the tourists, but most of the tourists come from Sweden or Norway. Popular activities are hiking and cycling as well as water related activities like sailing. In both regions the nature is one of the prime pull factors. Cultural sights are around but not that important for tourism. The accommodation in these regions is dominated by holiday houses for rent. A large amount of these holiday homes are second homes and used by the owners themselves.

Differences: While most of the foreign tourists in Sweden come from other Scandinavian countries and Germany, foreign tourists in Norway originate more from the South like Netherlands, Germany and Spain or from the East like Russia.

> *Low comparability regarding the analysed data*

➢ **Regions in the United Kingdom**

> To a certain extent, the regions in the United Kingdom are comparable as well to the other analysed regions in the NSR. But the differences concerning aspects like accommodation, most important activities and origin of the tourists are greater than the differences found between the other regions mentioned above.

Summing up the analysed regions within in the NSR a lot of similarities do exist. But it is only for a few regions that the comparison shows satisfactory results. Despite a number of similarities the other regions displayed vast differences concerning major aspects in supply and demand of the tourism sector. Because not every single detail of the regions could be analysed in this chapter the Challenge Profiles in the appendix volume *ToLearn - Background Investigations* provide further insights into similarities and differences among regions which were not considered above.

2.3 Regional Strategies for Sustainable Tourism Development

Next to the analysis of structures and developments in North Sea tourism within the individual regions along the North Sea coastline, the discussion of the respective strategies of sustainable tourism is an important part of the Challenge Profiles. It is primarily about the general objectives of tourism development (Chapter 2.3.1); Chapter 2.3.2 then deals especially with the implications of sustainability.

Based on the observed changes in tourism such as global competition, stagnating tourism demand, increasing number of active elderly in the source markets, shorter and more frequent holidays, and the need for individualized tourist experiences, strategies for the future have been developed in the NSR.

These strategies include modernising offers such as eating places, accommodations, shops and visitor attractions; improving the use of natural assets; lengthening the season; improving cooperation and establishing umbrella brands; strengthening regional identity (USP), and improving qualification and other issues related to employment and staff.

Different destinations and regions within the NSR have incorporated one or more of these aspects into their respective tourism development strategies to varying degrees.

2.3.1 Objectives and Development Strategies of the Coastal Tourism Regions in the North Sea Region

Objectives and development strategies for coastal tourism vary within the NSR. Depending on the individual situation, the strategies and development plans focus on one or more issues mentioned above. While some of the issues are crucial for one region they do not play a significant role for others.

The following paragraphs highlight the most important issues; for detailed information on the individual region it is referred to the regional Challenge Profiles in the appendix volume *ToLearn – Background Investigations*.

One of the issues for development is the extension of the tourist season. In Belgium for instance, specific documents related to promotion of off-season activities and cycling promotion are developed by the marketing departments of each municipality. In Denmark, several destinations in the Danish NSR have been identified for development as part of the biggest development project in Danish tourism with the potential of all-year tourism. In Scotland, the tourism strategy sees scope to broaden the number and range of events and festivals held at different times of the year, to help lengthen the season. The same applies to some destinations within the North Frisian Coast in Schleswig-Holstein.

Another key issue is access to the destination. While in some destinations this includes primarily channelling and controlling traffic, improving access by air and sea, protecting the needs of residents and safeguarding the environment are crucial. Especially for island destinations, direct links are necessary to help offset distances from markets and seasonality.

Furthermore, business tourism is identified as a future (niche) market for some regions. In Sweden for example, at the national level, the Future Programme (Framtidsprogrammet), which has been released in 2001, focuses on three different business and five special development areas. The main business areas are business-related travelling with focus on meetings, big and international events as well as new products and brands adjusted to changing travel patterns and demands (quality criteria, shorter trips etc.).

For other destinations – especially those rather poorly accessible – MICE (Meetings, Incentives, Conventions, Events) has limited or no potential at all.

Those regions follow different approaches in their development strategies. In the German Federal State of Schleswig-Holstein, the tourism development concept focuses on three target groups. Namely

> ➢ families with children up to 14 year of age and medium to high income;
> ➢ so-called "Demanding or Sophisticated Epicures" (singles 39-55 years, couples up to 55 years of age with grown-up children and high income) and
> ➢ "Best Ager" who are 56 to 75 years of age.

To fulfil the specific demands of these target groups, tailored concepts are developed including modernised marketing structures, improved quality in service and training and a good value for money.

For the vast majority of destinations in the NSR, natural assets – such as the beauty and uniqueness of the landscape – are one of the biggest potentials. To create awareness for the importance of this potential is another issue for tourism development strategies.

In the case of National Parks or Nature Reserves, nature, landscape and natural heritage form a USP that can provide a sound basis for further marketing.

Other issues for developing the tourism sector are innovation, quality improvement, and increased professionalism often in combination with improvement of cooperation.

For a successful future tourism development, intensive engagement at all political levels, the coordination and dispersal of responsibilities between the public sector and the tourism industry, the provision of effective marketing as well as the stimulation of quality and sustainability and an increasing power of innovation shall be assured.

Nature tourism is a segment with a high potential. Especially offers for nature experience will be strengthened.

Furthermore, the development of experiences is stressed in recognition of the "experience economy" concept. In addition, the potential of the Internet as communication and distribution tool is recognized. Also, market research and improved demand side analysis is an important aspect.

2.3.2 Significance of Components of Sustainable Development from the Regional Stakeholders' Point of View

A questionnaire was elaborated in the context of the Challenge Profile's Focus Groups for each region (see *Background Investigations Volume*). The central question in the questionnaire was "how important are the following criteria for tourism stakeholders in the region?" To answer this abstract question, the twelve sustainability criteria by the UNWTO and UNEP of the year 2005, which have

been introduced in Chapter 1.1 were taken as basis. The criteria were discussed separately and valuated according to the following scale:

> ➢ not important at all
>
> ➢ hardly important
>
> ➢ neither important nor unimportant
>
> ➢ rather important
>
> ➢ very important

The Focus Group experts developed a leading opinion. Partly the experts submitted their own rating, so that subsequently the average could be formed. Partly the experts were asked to agree on a common valuation. The thereby incurred results are at any rate comparable with each other. In the following, the twelve sustainability indicators differentiated by the UNWTO/UNEP are approached successively.

Economic Viability

This criterion has been rated as appropriate in all Focus Groups and receives the highest valuations from all sides.

Local Prosperity

The same applies here. Its meaning is rated as very high. Only in two cases it was rated between "very important" and "rather important".

Employment Quality

Valuations for this criterion range. The Belgian Focus Group rates it as "hardly or not important". But also the Lower Saxony Focus Group distributes averagely the attribute "neither important nor unimportant".

Social Equity/Inclusion

Whilst the Belgian Focus Group regards this criterion as "very important",

other Focus Groups tend to the valuation "neither important nor unimportant".

Visitor Fulfilment

Ratings are consistently between "rather important" and "very important". Merely the Schleswig-Holstein Focus Group determines a medial valuation.

Local Control

Valuations range between "rather important" and "neither nor".

Community Wellbeing

Valuations here range heavily. The Netherlands and Schleswig-Holstein tend to "rather important", while the Belgian Focus Group submits the valuation "not important at all".

Cultural Richness

Valuations here are relatively high on average, consistently in the range of "rather important".

Physical Integrity

Predominantly valuations between "rather important" and "very important" were submitted. Solely the Belgian Focus Group determines "not important at all".

Biological Diversity

Here, too, the Belgian Focus Group is the most cautious one with the rating "hardly important". Most Focus Groups tend to the centre. Solely the North-Netherlands Focus Group rates this criterion "very important".

Resource Efficiency

For this the same ratings as for the previous criterion "Biological Diversity" were submitted.

Environmental Purity

All Focus Groups valuate this criterion considerably high. Valuations are between "very important" and "rather important".

Comparing the main objectives of sustainable development with each other, it shows that the economical sustainability (first three criteria) has been valuated consistently higher than the ecological sustainability. In this context it should be noted, that the Focus Groups had the task to valuate the sustainability and the single criteria specifically from the perspective of the stakeholders in front of the tourism destinations. This explains the domination of economical sustainability. However, it is noticeable, that in particular in Belgium the criteria of ecological sustainability seem to be valuated markedly low, except for „Environmental Purity". It could be an indicator that the importance of ecological sustainability is being undercharged by the Belgian Destination Management. However, it has to be noted that the Belgian North Sea coastline is extremely densely populated. Ecological clearances concentrate for the most part on the coast's backcountry.

Apparently the tourism stakeholders connect the criterion of "Visitor Fulfilment" only partly with the concept of sustainability. It is explained by the fact that in no account the unconditional maximum valuation "very important" was submitted. There may not be any doubt that the visitor fulfilment is a central objective in tourism management. Yet the correlation with sustainable tourism development is not clearly understood so far.

The criteria of social sustainability are the most inconsistently valuated ones. Only single Focus Groups charge criteria like "Employment Quality", "Social Equity", "Local Control", "Community Wellbeing" or "Cultural Richness" as "very important" or "rather important". In the same manner only single Focus Groups rate these criteria in correlation with a sustainable tourism development as "hardly important". This applies in particular for Belgium in terms of the criteria "Employment Quality" and "Community Wellbeing".

The results mentioned here should not be overrated, as the valuated criteria are relatively vague and possibly not always understood equally by the single Focus Group participants. So the fact of the very small disparity in the rating of the economic and ecologic criteria of sustainability can only lead to the conclusion, that both criteria bundles are being regarded as equally important. However, it can surely be generalised, that the tourism stakeholders in specific destinations do not yet see the importance of the social sustainability criteria.

2.3.3 Orientation towards Innovation and Framework for Tourism Policy

Compared with other industries, tourism is not the most innovative sector. Something regarded as innovative in tourism is already common sense in other industries. There is a strong dependency of innovation on funding and dedicated individuals.

There are different forms of innovation throughout the NSR. However, they consist primarily of product innovations such as upgrading/construction of facilities, product packaging and use of technology to improve tourist information.

Although economically important for many of the coastal regions in the NSR, tourism is not always regarded as serious business. Often this attitude within the tourism sector but also from external business is a barrier for tourism development.

Policy issues and bureaucracy can also constrain tourism development in different ways e.g. if there is a lack of coordination with spatial planning or between different policy levels. In general, some difficulties originate in different planning intervals in politics and tourism development. Election periods are often shorter than the time frames for the development of tourism plans and strategies.

It is hardly possible to generalize the influence of tourism policies in the NSR. Political priorities vary according to national, regional and local circumstances. In the same way, responsibilities and coordination of tourism policies vary greatly within the NSR. The importance of tourism is not acknowledged equally throughout the NSR. However, there is a growing recognition of tourism's benefits and importance by governments on different political levels to be noticed.

Key stakeholders do play an important role for tourism at local or regional level. It depends on the individuals and their respective surroundings and backgrounds in which ways their influence on tourism comes into action.

Generally, key actors are described as people with a profound knowledge of the region and its characteristics, with communication skills and with either political power or economic power or both.

The majority of key stakeholders belong to municipalities and the national government, local and regional DMOs (Destination Management Organisations) or businesses and their associations.

2.3.4 Networking, Cooperation and Regional Learning Effects as an Impulse for Sustainable Tourism Development

The tourism sector across the NSR is very much fragmented and consists of numerous actors of all kinds. In most regions, small and medium-sized enterprises (SMEs) form the majority of tourism business.

This characteristic feature of the tourism sector has significant influence on communication, cooperation and learning in the region.

First of all, representatives have different and sometimes conflicting interests which in some cases undermine cooperation and the formation of joint marketing organisations.

Secondly, not all tourism actors see the need for cooperation and are rather cautious in sharing knowledge with business rivals. Consequently, the general impression is that cooperation between tourism stakeholders in the NSR could be improved.

However, existing networks that were mostly formed by government actors, local and regional DMOs and businesses and their associations are described as efficient and rather open. Depending on the size and the location of the region/ destination, these networks work primarily at a regional level. They are used to exchange information, knowledge and experience.

Although tourism networks are more or less open to everyone related to tourism, in some areas nature protection organisations play a defensive role. Also, natural assets are sometimes perceived primarily

as a tool for marketing a destination. The beautiful landscape acts as a setting for holiday activities but the appreciation of and the respect for nature is not encouraged.

However, in many parts of the NSR – especially those that are part of a National Park or protected areas – nature conservation is an essential part of every day life. Regional DMOs and businesses and their associations are described as efficient and rather open. Dependent on the size and the location of the region/ destination, these networks work primarily at a regional level. They are used to exchange information and knowledge. Quality systems and labels for sustainable tourism, support nature conservation and contribute to raising awareness for nature.

Communication is essential for successful cooperation within the tourism sector, because in tourism no one owns the product. Consequently, cooperation and partnership are the key issues.

In areas where there are key actors who are perceived to have influence, power and trust either because of their position, their personality or because of a combination of both, as well as tension between individual destinations can be reduced. Tensions can come into being when destinations and/ or regions perceive their independence under threat. Considerable parts of the NSR are comparatively remote regions characterised by traditional autonomy of the inhabitants and the necessary endurance to protect the area they live in.

However, this can also lead to successful cooperation within regions. At the Dutch coast for instance, the province of Zeeland shows much cooperation and mutual support due to a culture of commitment, involvement and attachment. There, cooperation is based on emotion and mutual trust; everyone wants to be involved and to have a say.

Another example is East Frisia at the German coast of Lower Saxony, where the structures of cooperation are an important element for the tourism. There is only one organisation for tourism marketing for the whole destination and the destination presents itself much more autonomous with impulses coming from within the region.

Regarding professional training, the tourism sector is lagging behind compared to other industries. There are some initiatives at different levels to improve qualification for different target groups. In the UK, for example, the East of England Tourist Board supported a programme of funding for employee training for SMEs. In Denmark, a national competence development initiative aimed at improving the Danish Inns' and Hotels' competitive position by creating learning opportunities and sharing knowledge on how to use the business potential more effectively.

Despite some successful examples, the fragmented nature of the tourism sector is often a barrier for qualification initiatives.

In the same way, innovative approaches are hindered (see Chapter 2.3.3). Overall, innovative approaches come primarily from key actors such as tourism marketing executives. Bigger organisations are usually more innovative than smaller enterprises.

Summing up, networking, cooperation and regional learning are essential for sustainable tourism development and will have to receive further attention. Barriers such as the fragmentation and the high number of stakeholders can be overcome by communication and by learning from successful examples as presented in Chapter 3.3.

However, prerequisites for successful learning processes are understanding and potential benefits, i.e. benefits are outweighing costs as well as trust.

Tourism development strategies for all parts of the NSR include aspects of networking, cooperation, regional learning, innovation as well as modernisation, strengthening regional identity (USP) and improving qualification and other issues related to employment and staff. They include ways to meet the challenges from global developments. However, there are differences between the regions with regard to the priority issues of tourism development that have been identified in their respective strategies.

Priorities for the Danish and parts of the German NSR are on modernising tourism infrastructure. In Germany, lengthening the season is also a priority for most coastal destinations while in parts of the Danish NSR capacity has reached its limits.

Improving cooperation is a major issue for most parts of the Norwegian NSR and the Dutch NSR especially between the Wadden islands and the mainland where cooperation is still in its infancy. In Germany and Belgium first steps have been undertaken to tighten the links within the respective region (*Beaufort Festival* and *Conference of Islands and Holmes*) while on the Scottish islands of Orkney, collaboration between tourism stakeholders has been established at the end of the 1980ies and is in a consolidated state.

Staff qualification is another focus for the Danish NSR and also in the UK but less in the other parts of the NSR. In the same way, strengthening regional identity has a higher priority in Denmark, Germany and Belgium than in the UK.

Metaphorically speaking, all regions are walking in the same direction but taking different paths towards the pursuit of sustainable development.

2.4 Summarising Valuation of the Tourism Development within the Various North Sea Tourism Regions

2.4.1 Strengths and Weaknesses in their Regional Differentiation

The tourist offer along the entire NSR features numerous non-differentiated similarities:

➢ extensive, attractive and undisturbed nature, only few places with dense settlements (especially in Belgium, North and South Netherlands);

➢ high water quality;

➢ therapeutic climate;

➢ relaxed and quiet atmosphere;

➢ rich cultural heritage with historic structures and charming old, mainly small cities; numerous innovative cultural events;

➢ wide range in guest accommodations, both regarding the structure and today's quality requirements;

➢ a broad variety in activity offers such as sports, nature experience and open air activities (e. g. rugby, walking, cycling);

➢ only few places are accessible by train, and even the reachability by car is suboptimal so far as some regions are secluded.

In between this homogeneous situation there are two types of regions, which clearly differ regarding their attractiveness for tourists:

1. The rugged, hard-rock and often steep coasts of Scotland, Norway and Sweden (Bohuslän), where sailing and various kinds of fishing dominate,

2. the low-lying, "soft" rather straight coastlines of eastern England, Belgium, the Netherlands, Germany and Denmark, where holidays focussing on beach uses dominate.

A speciality of the last-mentioned region is the coherent Wadden Sea area between West Fryslân and Southern Jutland, where beach and bathing holidays concentrate primarily on Islands and are completed by broadly structured nature tourism.

With the described structures and facilities, the NSR as a tourism destination competes with for instance

- ➢ the Baltic region with its more continental climate, lower price level and a more modern tourist infrastructure (especially in Eastern Germany, increasingly in Poland and the Baltic countries);
- ➢ the English Channel and the Biscayan with their milder, but yet rougher climate;
- ➢ Southern Portugal, Madeira and the Canary Islands;
- ➢ the Western or Eastern Mediterranean Sea.

Following Chapter 2.3.2, it may not be proven but postulated that the North Sea tourism destinations are further in progress than their European competitors concerning the sustainable structuring of their offers. This compensates weaknesses such as the partly relatively upper price level or the poor state of the tourism infrastructure.

Greater regional differences within the North Sea area can be determined regarding image and marketing as well as region-internal communication and networking.

Image and Marketing

In terms of these fields of action, the Challenge Profiles show significant differences in strengths and weaknesses.

Table 2.10: Strengths and Weaknesses in Image and Marketing

Country	Strengths	Weaknesses
Belgium	*Traditional destination for many Belgians, Luxembourger and Germans* *Clear choice at Belgian level for a specific approach of the macro product Belgian coast* *Regional cooperation by means of promotion for the coast: bringing together budgets of several levels as a result of which larger budgets can be generated*	*Promotion insufficiently oriented on specific target groups* *Limited use of new technologies (Internet, efficient web pages)* *Old image (too much destination for the elderly)* *Not well known on Dutch market* *Not a prestigious destination*
Netherlands	*Fryslân and Noord-Holland are strong brands in itself especially for Dutch and German tourists*	*Lack of central power/support to direct marketing efforts, too much fragmentation and too little cooperation* *The competition with other destinations (e.g. cheap sun destinations) is fierce. The image of Fryslân as a backward region, the image of a bad price/quality ratio, and the idea that 'tourism is for losers'; do not stimulate the market position* *Web based marketing in the Netherlands is poorly developed, especially in North Netherlands.*
Germany	*Clear and powerful image* *Umbrella brand "Die deutsche Nordsee" (The German North Sea).*	*Scarce incoming tourism*

Denmark	*Image as "very professional internationally-minded holiday house agents"*	*Mainly oriented towards the German market, additionally to Sweden and the Netherlands*
Norway		
Sweden	*Bohuslän´s coast is like a brand: well known for the Skärgarden/ historical heritage and cultural events*	*Only known within Sweden, additionally within Denmark and Norway*
United Kingdom	*Well-known for historical and cultural heritage*	*The country has an image as being flat and boring - limited visitor information and interpretation (Lincolnshire)* *Lack of destination research and adequate data (UK East); little known on the international market*

Communication and Networking

Summarising the results of the Challenge Profiles, the following severe differences among the tourism destinations of the NSR can be ascertained:

Table 2.11: Strength and Weaknesses in Communication and Networking

Country	Strengths	Weaknesses
Belgium	*Regional cooperation by means of promotion for the coast*	*Limited cooperation in sport services - Service for Tourism* *Difficult to involve small communities in common projects*
Netherlands	*Cooperation with North Netherlands Bureau of Tourism (now called Fryslân Marketing).*	*Tourist Information (VVV) does not give a wide support, does not support collective cooperation in the region, but focuses on its own organization.* *Lack of umbrella organizations.* *Little willingness to cooperate. This willingness increases when times get worse. The entrepreneurs do not trust each other well enough to take up the marketing together.* *Too much fragmentation and too little cooperation*
Germany	*A lot of networks which work efficiently*	*The North Sea Resorts do not feel to be well represented by the activities of the North Sea Resort Association.* *The non-tourism oriented economy is sparsely integrated. The same applies for environmental and nature protection organizations.*
Denmark	*Number of theme based network: Fishing, golfing, cycling, wellness and gastronomy networks founded as part of the initiative Aktiv Denmark* *National pursuit of improved accessibility*	

Norway		*The collaboration should be improved* *The relationships are not close* *Communication happens mostly via e-mail*
Sweden	*Good Practise Examples for effective Communication, Cooperation and Networking* *Networks are not strictly organized. They are open to everyone interested in cooperation.*	*Cooperation can still be increased, especially regarding the inclusion of local inhabitants in the tourism networks*
United Kingdom	*Good cooperation as one part of the sustainable tourism development strategy (UK East)*	*Pressure on local government funding has caused a number of authorities to close their tourism departments.* *Highly fragmented and weakly organized tourism industry, characterized by a large number of small and micro businesses (Lincolnshire)*

2.4.2.   Present Tourism Trends in Supply and Demand and their Meaning for the NSR

The identified trends in demand within each tourist region of the North Sea area are most of all

➢ the increasing expectations of the tourists;

➢ the decreasing duration of North Sea coast holidays in connection with an increase of short trips as well as

➢ the growing members of senior tourists.

Requirements

One of the important trends identified by nearly all countries is that the guests are choosier: The increasing requirements of the tourists especially concern cultural attractiveness, accommodation and activities. That means that tourists become more critical: the quality of accommodations and services is of huge importance. The tourists increasingly compare between different regions, attractions and offers. Furthermore, it becomes more difficult for the different regions to keep the level of repeat visitors.

Regarding the activities most of the regions have a lot of strengths. Nature oriented activities like biking, hiking, sailing, bathing, golfing and fishing are the favourite choice of the tourists. They are almost everywhere well developed and increasing. Unfortunately, these activities are weather dependent. Due to the unstable weather conditions around the North Sea this could be a threat in the future, especially when competing regions improve their weather independent attractiveness. In the majority of cases only bigger cities within the coastal regions keep lively and interesting all year-round. An opportunity for NSRs could be the development of more flexible attraction poles and a service/infrastructure for tourists which could be used during bad weather phases. Even during winter time there are possibilities to develop specific types of activities. Furthermore, all-weather facilities would strengthen the low season. More focus should be on the all-year sectors Wellness and MICE tourism.

A wide range of alternative forms of active recreation could be answered through an improved cultural and historical attractiveness. Most of the countries indicated an increasing interest for cultural activities. In most of the regions, traditional towns and villages are culturally and historically attractive – especially fishing villages like in the Netherlands, Germany, Denmark, Sweden and in some parts of England like Yorkshire.

The problem is the clear need for information about possibilities and activities to visit cultural heritage sites. Often culture tourism is relatively underdeveloped and insufficiently related to other segments (such as nature tourism). Cultural events should become more and more an integrated part of the tourism product (e.g. the cultural event *Beaufort* in Belgium, which is further introduced in Chapter 3.3).

Other important cultural aspects are cultural attraction poles (like events, museums) and regional food and products which should be strengthened too.

In some countries a growing attention of the tourists towards the regional culture was resulting in a growing supply of cultural programs and indicated a clear opportunity for these regions.

The situation concerning the quality of accommodation is more heterogeneous. The quality and in particular the age of the accommodation differs from country to country. In some parts of the Netherlands, Germany and Norway diverse hotels do not match the current quality standards due to the fact that they were built in the 1960s and 1970s. Modernizations and an improved quality level would help to avoid that this circumstance threatening future tourism development.

Length of Stays

A clear trend of demand regarding tourism which was identified in nearly all countries is the decreasing average of length of stays e.g., the average length of stay in Belgium in 2000 was 6.3 nights while it decreased to 5.5 nights in 2003. Further, there is a clear trend to shorter but more frequent stays.

The trend towards more but shorter holidays as well as short trips (not more than 3 nights) could also stimulate the low season. An increasing interest in the low season could be an opportunity for the coastal regions. Due to the fact that the average length of stay is decreasing, it is important for the different holiday destinations to attract more tourists and to turn encourage repeat visits. To achieve this, a good supply responding to the demand is important. Therefore, NSRs with a rich offer of all-year activities in connection with a high level of cultural attractiveness have good opportunities to strengthen their tourism.

Share of Senior Tourists

Within the NSR a growing number of *active seniors* or *65-plussers* can be observed. This growing target group has discerning needs and high requirements and is willing to pay for it. Hence, the 50plus generation is a very attractive group for the tourism sector.

As mentioned in the beginning of this chapter, the guests get choosier regarding activities, cultural attractiveness and quality of accommodation. This partly relates to the increasing share of seniors. Regions which have their strengths in these sectors and which thus can meet the growing requirements have the opportunity to improve their tourism flow in the future.

These important trends in demand are opposed by two extra noticeable trends in supply, namely

> ➢ the improvement of the supply quality (accommodation, tourism infrastructure) and
> ➢ the increasing significance of accommodation plus all kinds of activity packages.

Quality Improvement

The first trend of supply which can be identified is the quality improvement. This includes accommodation, cultural offers and events as well as a wide range of further activities (from golf to wellness). Consequently, the tourism sector responds to the changing demand.

In Belgium, for example, an improved quality regarding security and comfort of accommodation is a clear trend. The same holds for Sweden and Denmark. Furthermore, examples like the *Beaufort* event

in Belgium or active marketing measures for regional food in the Netherlands, Germany and Denmark show that regional cultural attractiveness currently becomes an increasingly important element in the tourism sector.

Risks result from a lack towards all-year activities as well as the increasing share of elderly people and the trend towards shorter stays if no measures are taken.

Packaged Holiday Offers

The second trend of supply which can be identified is the packaged holiday offers. This can be a combination of different offers like accommodation, gastronomy, (cultural) activities and wellness. Packaged holiday offers indicate a clear advantage for regions with an attractive city close by (e.g. Belgium with Gent and Oostende, Jaeren with Stavanger, Sweden with Gothenburg and the Netherlands with Oldenburg and Groningen)

For the other tourism destinations this trend could mean a threat in the future. Therefore, the disadvantaged regions ought to be sensitive for this trend in different ways. Offering tour packages, e.g. for senior people or families and further all-year facilities would help to strengthen these regions.

The depicted trends pose immense risks for the North Sea destinations, as several are not yet prepared. But under certain circumstances there are clear opportunities, too:

1. The increasing demand includes just privacy and nature pleasure in connection with pronounced quality demands to accommodation and gastronomy. The NSR is able to build upon its basic strength: the highly attractive setting of nature and landscape. Yet it is important to develop more unique offers concerning accommodation, gastronomy and accompanying activities.

2. The shorter duration of stay and the increase of short trips offer chances, if the destination is successfully positioned not only as a main holiday destination but as well as a second holiday destination for the early and late season. This requires a radical improvement of the tourist offers especially outside the main season.

3. The growing average age of the tourists is to be seen in the same coherence. Especially elderly people like to undertake short trips, where the travel destination may be located near to the headwaters. This circumstance is important for the North Sea Area, as it is located near to the dense settlements of the littoral countries. Added to that, the share of elderly tourists being equipped with a relative high travel budget is at present still high and partially increasing.

4. Improvement of quality is a central requirement to take advantage of the chances listed in 1. – 3.

5. The better NSR succeeds to generate unique holiday experiences by offering tour packages, the better are the chances that the depicted trends may be used. Innovations in the field of events play a significant role as mirrored in the Good Practise Examples (see Chapter 3.3).

3 Pilot Regions as *Learning Regions*

ToLearn Pilot Regions are regions that have been particularly successful in finding innovative solutions and strategies developing sustainable tourism. Based on existing regional knowledge the project partners have chosen one Pilot Region for each participating country. In all Pilot Regions, the development of sustainable tourism is pursued and various regional, national and international efforts are undertaken, including the establishment of collaborative networks, environmentally-friendly regulations and developing regional competences.

In each Pilot Region an analysis has been conducted which aimed at assessing the importance of regional communication structures, learning processes and innovation for the development of the region's tourism sector. This included the identification of key actors and their communication networks as well as their importance for the development of the respective Pilot Region. Also, issues of training opportunities have been elaborated and options for overcoming seasonality were checked. In total, the pilot region analysis focussed on the identification of strategies that can serve as learning examples for other destinations. The applied concept emphasises the importance and transferability of specified knowledge and the need for lifelong learning in a variety of formal and informal settings as the basis for improving both the social and the economic aspects of tourism sustainability.

This chapter is summarising the results of the analyses conducted by the partners in their Pilot Regions. The detailed reports have been published in the Appendix Volume *ToLearn-Background Investigations*.

These are the Pilot Regions:

> ➢ Belgium: Belgian North Sea Coast
>
> ➢ Denmark: Danish Wadden Sea Region
>
> ➢ Germany: Region Uthlande
>
> ➢ Netherlands: North Netherlands (West Frisian Islands)
>
> ➢ Norway: Rogaland County (partly)

Methodology

Each Pilot Region analysis was underlain by the findings of the respective NSR tourism profile and various secondary sources. The data were provided by a series of in-depth interviews with tourism experts from different types of entities and locations of the respective regions.

The interviews followed a standardized questionnaire, which aimed at facilitating comparison across interviews and ultimately across regions and countries. The questions were cooperatively developed by the project partners.

The Pilot Region studies were conducted comprising the following key questions:

> ➢ How important are regional communication structures, networks, learning processes as well as key actors and key institutions for the development of the region's tourism sector?
>
> ➢ Which communication structures and learning processes formed the basis for the region's success?
>
> ➢ What are the main barriers to implementing innovative strategies and which steps have been taken to overcome such barriers?
>
> ➢ Which strategies aimed at coping with challenges in tourism implemented in the past years could be considered innovative and may serve as Good Practise Examples to other regions?

The following chapters introduce the Pilot Regions, elaborate their respective cooperation strategies and describe Good Practise Examples for learning processes that support the pursuit of sustainable tourism development.

3.1   Setting the Scene: The Pilot Regions

The Pilot Regions were chosen because appeared to have been particularly successful in finding innovative solutions and strategies for developing sustainable tourism. The innovative strategies applied are reactions to specific problems/ challenges in the respective region. Although similar in some or more ways, the Pilot Regions differ in terms of size, population and tourism intensity.

Almost all Pilot Regions cover rural areas.

The Belgian Pilot Region is an exception in several ways: It is the smallest region and it represents a rather urban part of the North Sea Coast.

3.1.1   Basic Characteristics, Location and Accessibility

In most of the Pilot Regions, an attractive natural landscape is the most important feature. In fact, the Danish, German and Dutch Pilot Region are part of the Wadden Sea region and are surrounded by or are part of protected areas such as national parks.

The natural landscape with beaches, dunes and the tidal flats of Wadden Sea are providing opportunities for bathing and swimming and a lot of other activities as cycling, hiking, walking, horse-back riding, golfing, bird watching, fishing, sailing, surfing, bathing, amber collecting, etc.

The Belgian coast is an exception: besides its natural attractiveness (e.g. beaches), towns and their architectural and cultural features (promenades, attractions, casinos, nightlife) play an important role for tourism.

A significant feature for almost all parts of the Pilot Regions is their peripheral location, remote from the major urban regions of their respective country. This is particularly true for the islands but also for mainland areas of Pilot Regions; these are comparatively isolated locations due to weak connections to major road and/ or railway networks. Consequently, accessibility is more or less an issue for all of the Pilot Regions. In Belgium, where most of the coast is densely populated and built up, accessibility might be limited due to traffic jams especially during the peak seasons.

Belgian Coast

The Belgian coast spans on 67 km of coastal line that belongs to ten coastal municipalities (De Panne, Koksijde-Oostduinkerke, Nieuwpoort, Middelkerke, Oostende, Bredene, De Haan-Wenduine, Blankenberge, Zeebrugge and Knokke-Heist). The land lying behind the dikes or dunes belongs to the Flemish polders. The whole Belgian North Sea Coast is situated in the region West Flanders.

The population of almost 220,000 (216,834) is rather concentrated in the central part of the Belgian coast with nearly half of the people living in this area. Oostende is the biggest town with roughly 70,000 inhabitants (NIS 2007).

Danish Wadden Sea Coast

The Danish Pilot Region is located in the South of the Jutland peninsula stretching from Blåvandshuk to the German border. It comprises the islands Langli, Fanø, Rømø and Mandø, the sandbank Koresand as well as the towns Varde, Esbjerg, Ribe and Tønder. Known as the Danish Wadden Sea Region, the landscape features specific characteristics such as tidal flats.

Numerous dunes are to be found around Blåvandshuk as well as on the Wadden Sea islands forming a contrast to the partly still unprotected marshlands, which dominate the region's scenery. The West Jutland bird areas are of such an international significance that they have been appointed EU bird sanctuaries.

The Danish Wadden Sea Region comprises an area of 3,227 km² and is home to about 208,000 inhabitants (Statistikbanken, 2008). The average population density of 64 inhabitants/km² is below the average of the region Syddanmark (99 inhabitants/km²) and the national average (128 inhabitants/km²). However, Esbjerg municipality with the homonymous town - the fifth biggest town in Denmark – has a much higher population density than the remaining area.

Uthlande/ Germany

The Pilot Region is situated in the North Frisian Region Uthlande in the Federal State of Schleswig-Holstein. It covers the islands Sylt, Föhr, Amrum, Pellworm, Nordstrand, and the Halligen (holms) Hooge, Langeneß/ Oland and Gröde.

Due to poor farming conditions tourism has developed as source of income rather early in the Northern part of the region and there has been a long tradition of tourism. In the Southern more fertile part, agriculture has remained important for local livelihoods until the present.

In the Region Uthlande today almost 36,000 people live and work on 320 km² in 26 Communities and two cities. The average population density (113 inhabitants/km²) is lower than the average of the Federal State of Schleswig-Holstein (179 inhabitants/km²) and the national average (231 inhabitants/km²).

Situated less than 200 km away from the city of Hamburg, it takes about five hours to get from there to the islands. There are regular ferry connections from the mainland to the islands and some of the Halligen and the ferry rides take between 45 min and 2 hours. Sylt is connected to the mainland by a dam for regular train service. Also, a ferry operates from Havneby on the Island of Rømø, DK, to List, the northernmost community on Sylt.

North Netherlands – West Frisian Islands

The Dutch Pilot Region is situated in the North of the Netherlands and consists of the West Frisian islands Vlieland, Terschelling, Ameland and Schiermonnikoog.

Vlieland is the smallest of the four Frisian Islands. Terschelling is the largest and provides opportunities for different activities such as cycling or hiking. The short crossing from the mainland makes Ameland attractive for day tourists.

Because of its importance as a nature sanctuary, the entire island of Schiermonnikoog is a national park (www.visitFryslân.nl).

More than 10,000 people live on a total of 230 km². The average population density (45 inhabitants/km²) is lower than the average of the province of Fryslân (192 inhabitants/km²) and the national average (395 inhabitants/km²).

The biggest town in Fryslân is Leeuwarden.

Terschelling and Vlieland have ferry connections to Harlingen (45 min to 2 hours crossing). Ameland and Schiermonnigkoog can be reached by ferry from Holwerd and Lauwersoog (crossing ca. 45 min) respectively.

Rogaland County in Norway

In Norway, the coast is dominated by cliff sections with rocks and sandy beaches in between. In the lowland of Jæren, Norway's most beautiful beaches are to be found. These beaches are one of the main

attractions in the region. In the county live approximately 400,000 people (about 8,7% of the population of Norway) on a total of 9,325 km². It consists of 26 municipalities.

Due to limited capacities, the analysis of the Norwegian Pilot Region has been carried out in reduced depth.

3.1.2   Tourism in the Pilot Regions

Tourism plays a significant role in all Pilot Regions (4 to 18 million overnights). On the one hand, the North Sea coast has a positive image and hosts very popular destinations. Some noteworthy aspects are:

> ➤ Coastal tourism in the Danish Wadden Sea Region is at a consolidated stage of development and Southern Denmark is Denmark's most important tourism region in terms of overnight stays (2004: 13 million) and only outnumbered by the capital of Copenhagen in tourism revenue (2004: 9 million DKK) and tourism employment (2003: 16,574 jobs).

> ➤ The region Uthlande represents of one of the most popular German destinations: Sylt Island with 720,000 visitors and 5.8 million bed nights (2006). In comparison, the whole North Sea Coast in Schleswig-Holstein accounts for about 7 million bed nights (NTS, 2008).

> ➤ In the Province of Fryslân, about 40% of the tourism is directed towards the Wadden Islands who accounted for about 4.4 million bed nights in 2004 (Toerdata Noord).

> ➤ About ten million visitors come to the Belgian coast each year.

On the other hand, regarding specific characteristics and features of tourism enormous differences exist across the Pilot Regions and also within the respective Pilot Regions. This includes natural features, tourism infrastructure, types of accommodation and tourism revenue.

In this chapter, major findings are generalized to allow comparability.

Table 3.1: Tourism Intensity within the Pilot Regions (Hoffmann 2008)

Pilot Region	bed nights [mio]	Tourism Intensity
Belgian Coast (2006)	18.40	84,858
Danish WSR (2008)	9.40	45,192
Dutch Wadden Islands (2004)	4.40	429,855
Uthlande (2006/2004)	9.23	256,389

In general, tourism in the Pilot Regions can be characterised according to the features mentioned in Chapter 2.2. Families and elderly people without children (empty nesters) are the primary groups of visitors and tourists belong to medium and high income groups.

There are also destinations within the Pilot Regions that have a higher share of young people – such as parts of the Belgian middle coast or parts of Sylt/ Uthlande. Quite a few destinations focus on nature tourism and attract visitors searching for tranquillity and unspoilt nature. Examples are the island of Vlieland and most of the Halligen in Uthlande. They are also most remote and difficult to reach.

Among the Pilot Regions, the Belgian coast has the most diverse tourism offer regarding activities. There are not only resorts, shopping facilities and art festivals but also a significant number of all weather attractions - a feature that is not equally well developed in other Pilot Regions.

Belgian Coast

Tourism is by far the most important economic sector for the whole Belgian coastal region. Both overnight tourism and day tourism are very important especially for Flemish citizens and inhabitants of Brussels. Also, second homes play an important role.

Coastal tourism has a significant impact on the socio-economic structure of the region and in particular on employment, income and investment. In this context, *Beaufort* has to be mentioned. It is one of the most significant cultural events along the Belgian North Sea Coast. In 2009 *Beaufort* will take place for the third time.

Danish Wadden Sea Coast

Today the Danish Wadden Sea region is one of the most popular tourism destinations of Denmark attracting domestic as well as international visitors, predominantly German tourists. Other visitor countries of origin are Norway, Sweden, the UK and the Netherlands. Being part of the new administrative region Southern Denmark, the Pilot Region contributes to the regions outstanding economic performance in terms of tourism. Visitors are offered a wide range of attractions, activities and accommodation.

Uthlande /Germany

The region Uthlande is diverse and heterogeneous regarding size, population, natural and cultural assets.

The region comprises one of the most popular German destinations, the island of Sylt - well known for its natural beauty and famous for high class restaurants - with 22,000 inhabitants and 720,000 visitors (2006) as well as the smallest community with about 20 inhabitants – the Hallig (holms) Gröde.

Unique natural assets such as long sandy beaches, dunes and forest characterize the region, combined with tourism infrastructure that (partly) is in need for modernisation.

The region's unique features are the Halligen (holms), small islands of low-lying land which is often flooded over with saltwater by the tides. The Halligen are mostly destinations of peace and tranquillity.

Accommodations in the region are mainly of the types B&B, holiday homes and self-catering facilities.

Dutch West Frisian Islands

Concerning Fryslân, 60% of tourism is directed to the mainland of Fryslân, while 40% goes to the West Frisian Islands.

Visitors to the West Frisian Islands are attracted by the landscape and by the coast. Not so much the beach, but mainly the sea: to get a breath of fresh air ('uitwaaien').

Vlieland is situated farthest from the mainland. It calls itself "oasis of tranquillity". To preserve this quietness and the island's natural flora and fauna, no cars are allowed on Vlieland. Terschelling is also known for its cultural festival known as *Oerol* that is held during the second week of June every year.

Ameland offers plenty of scenic places within woods and heath areas. A hundred kilometres of cycle paths provide plenty of variation. Schiermonnikoog has the widest beach in Europe and is an ideal destination for bird watching.

3.2   Cooperation and Innovation in the Pilot Regions

Networking, cooperation and regional learning are essential for sustainable tourism development and will have to receive further attention. Barriers such as the fragmentation and the high number of stakeholders can be overcome by communication and by learning from successful examples as presented in Chapter 3.3.

Both informal and formalized links are very important for the development of tourism in the Pilot Regions. Relations may be categorized further on basis of space into local, regional, national and inter-/transnational contacts and on the basis of time into permanent and project-related networks. The focus of the following paragraphs is on both permanent and project-related formalized regional and trans-regional/ international cooperation.

3.2.1   Regional Forms of Cooperation

Due to a number of reasons, cooperation is essential for sustainable tourism development. Joint marketing is becoming more important for all destinations across the Pilot Regions. This includes presentations on tourism fairs, joint websites as well as marketing campaigns.

However, examples show that successful tourism development covers more than joint marketing. Cooperation includes sharing resources, filling gaps and exchanging information and knowledge as well as experiences.

Communication is regarded as a precondition for cooperation. In all Pilot Regions, communication platforms are in place and the majority of them are institutionalised.

For communication processes, key actors play a significant role. It is their respective way of communicating, of creating opportunities for contacts/ communication and including stakeholders as well as decision making that contributes significantly to the regions' successful internal cooperation.

Generally, key actors are described as people with a profound knowledge of the region and its characteristics, with communication skills, with political knowledge and a way of working that assures that all interests are met. Other key actors are representatives of economically successful destinations.

Both individuals and organisations are key actors in the Pilot Regions. They range from business associations and unions of communities to government agencies. Often there is an overlap when dedicated individuals are members of organisations and thus are the drivers of cooperation processes.

In general, cooperation at a regional level, i.e. between different islands has been developing slowly. Joint marketing and joint representation on tourism fairs are the first step towards closer relations (as in Uthlande and Fryslân).

On the other hand, a precondition for establishing tighter links is building trust. This takes time especially in regions that are characterised by a certain isolation from which a strong sense of independence has derived. Furthermore, poor connections that inhibit more frequent face-to-face contact can be seen as another inhibiting factor.

As mentioned, informal links are equally important. Face-to face contacts and informal meetings provide the opportunity to solve conflicts, to arbitrate between parties and to build trust within the regional network.

In the Danish Wadden Sea Region, cooperation among the municipalities has recently become institutionalized. The regional development forum Sydvestjysk Udviklingsforum (SVUF), established in 2007, is an inter-communal association comprising of the Wadden Sea municipalities and Vejen. It seeks to initiate and ensure the implementation of projects, which aim at enhancing regional growth and development in the areas of business, settlement, education and tourism.

In Uthlande, establishing the *Conference of Islands and Holmes* (IHKo), a union of the regional communities, helped strengthening the ties within the region. However, due to distances and personal

characteristics not all tourism actors of the region are equally included in the network although the network is described as open.

In Fryslân, the Wadden islands are not really willing to cooperate with the main land, they focus mainly on themselves. The islands have their own open networks. But towards the mainland the communication network is rather closed.

In Rogaland, both local and regional networks are important. Relationships have not been close. There is room for improvement.

In general, networks within the Pilot Regions work quite successfully in including different groups of stakeholders such as DMC, administrations, nature conservation groups and other NGOs. However, the industry tends to be underrepresented in all of the regional networks. It might be necessary to conduct further research to elaborate possible causes. First hints suggest that the structure of the tourism sector (high number of SMEs / stakeholders) and the general business attitude might have an influence.

Project-related Cooperation

An outstanding example for project-related networks is the *Beaufort*-Project at the Belgian Coast. *Beaufort* is a contemporary arts festival, a Triennial of contemporary art, on show at the Belgian coast (www.beaufort03.be). What started as a presentation of contemporary art on a unique Belgian coastal strip to offer people an agreeable encounter with art – primarily organised to extend the tourist season – has become a good example for fruitful cooperation of (formerly) competing municipalities to the benefit of all.

The project has also inspired cooperation with other sectors. For example, cooperation with the Hotel and restaurant sector resulted in the Flemish project *Tafelen in Vlaanderen* (Dining in Flanders) (www.vlaanderenlekkerland.be), worked out by Tourism Flanders & Brussels via Westtoer. Restaurants and hotels can use the *Beaufort Project* to offer special *Beaufort* arrangements and menus.

Beaufort has immensely contributed to raise the awareness of the Belgian coast and to communicate this image also to overseas tourists (for more information on *Beaufort* see Chapter 3.3).

That was made possible by a very well-planned and effective communication structure. Various actors including museums, administrative bodies, national tourism organisations and a professional organisation (Westtoer) were included in order to exchange information and resources and to receive support and advice.

Three communication platforms were set up to improve the efficiency:

➢ A decision-making platform for deputies of the municipalities,

➢ a communication platform for tourism and culture departments,

➢ a technical platform for technical staff (technical groups of *Beaufort* are responsible for control and conservation of the art objects).

The Head of Communication for the *Beaufort Projects* has won 'The Silver International Museum Communication Award' (IMCA) for the excellence of communication with all *Beaufort* stakeholders.

Apart from raising tourism revenue, the *Beaufort Project* has improved the ties between the coastal communities and also between cultural and tourism departments and thus contributed significantly to improving regional communication.

Regional communication is very important especially in the Belgian case, were local rivalry linked to the access to the coast was present for centuries. Regional stakeholders expressed their hopes that based on this growing positive experience future actions will be developed.

Other examples for project related cooperation include the Good Practise Examples identified in the ToLearn project are described in Chapter 3.3.

Barriers to Effective Communication and Cooperation

Remoteness of a region is perceived as a (structural) barrier regarding participation in networks outside the region. Being involved in organisations and / or networks and social work means having appointments and participating in time-consuming meetings. Due to limited connections, remote regions are structurally cut off from possibilities to participate and to engage in social and political activities. Consequently, the region's interests are more likely to be neglected by the politics on different /higher political level such as Federal or State/ Provincial politics.

Another barrier for cooperation is a (deep routed) antagonism either between some of the islands and holms or the islands and the mainland. Economic success seems to be an underlying factor in this complicated relationship.

Generally, resentment and jealousy are obstacles for a good cooperation. At the same time it is hard to achieve a cooperation of very unequal partners. Consequently, the heterogeneous nature of the destinations in the region combined with a strong sense of independence is a major reason for poor cooperation in some areas.

3.2.2   Interregional Approaches of Cooperation

Cooperation across administrative borders has improved due to projects supported by EU funding and/ or organisations and their structures. Examples are the *Beaufort Project* or the *Conference of Islands and Holmes* (IHKo).

In the Danish WSR, there is interregional cooperation among local and regional DMOs and economic development agencies. Most efforts are directed towards joint marketing and include i.a. the publication of brochures such as Nordseeurlaub. However, regular communications among Danish tourism actors are facilitated by national business associations such as HORESTA and thematic umbrella organisations such as Smagen af Danmark. Project related cooperation also extends beyond administrative borders as indicated by two of the Good Practise Examples, namely ODA and Competence Development in Danish Inns and Hotels. The examples include *De gode historie* (5 stories) and a network of 14 local artists (exhibitions, shops, work observation).

In Uthlande, there is a rather informal cooperation with the Federal State of Lower Saxony and there is a working committee for destination marketing of both, the German Baltic Sea and the North Sea coast in foreign markets. Most destinations in the region are members of the AG Deutsches Küstenland as well as in a union of the German seaside resorts called AG Deutsche Seebäder. Most tourism actors in the region do not have sufficient capacities to pursue transnational cooperation. There is also a language barrier.

In the West Frisian islands, there is some cooperation across the borders. However, more cooperation between the islands and the main land would be favourable for a significant number of tourist companies that work alone.

International Level

International agreements between Netherlands, Germany and Denmark regarding the protection of the Wadden Sea have led to the establishment of:

> ➢ The Common Wadden Sea Secretariat in Wilhelmshaven to facilitate the coordination of activities and measures for a comprehensive protection of the area (www.waddensea-secretariat.org).

> ➢ The Wadden Sea Forum, an independent platform of stakeholders from agriculture, fisheries, energy, industry and harbour, nature protection, tourism, and local and regional governments (the "Wadden Society") enabling dialogue and pursuing the joint sustainable development of the region (www.waddensea-forum.org).

> ➢ The International Wadden Sea School, an educational programme, to teach pupils through school trips, field excursions and classroom materials about the Wadden Sea (www.iwss.org).

Furthermore, *Euregio The Wadden* is the association of all municipalities and cities on the islands in the European Wadden Sea area of the North Sea, i.e. Danish Islands, North Frisian Islands, East Frisian Islands and West Frisian Islands. Every two years, a Trilateral Wadden Sea Conference is held.

The *Euregio* Common Office is located in the Regionalbüro Uthlande, which was established by the North Frisian organisation *Conference of Islands and Holmes* (www.euregioislands.eu).

Although these cooperations are not exclusively focussing on tourism, tourism is a leading issue within the cooperation because of its importance for the Wadden Sea region and its links to other areas such as nature protection and cultural heritage.

Other forms of transregional cooperation include:

> ➢ Project-related cooperations: INTERREG North Sea Trail, virtual museum and LEADER village development

> ➢ KIMO - Local Authorities International Environmental Organisation against marine pollution: 5 national networks (UK, Belgium, NL, DK, S), lobby work

> ➢ Relations with other parts of the NSR through initiative of friendship/partnership towns or personal contacts (e.g. Cooperation between Denmark and Germany through interns of Freiwilliges Ökologisches Jahr)

> ➢ workshops on potential cooperation with municipalities in Schleswig Holstein and Danish Wadden Sea Region (IHK Flensburg Regionalmanagement) which are very practical, and focussed on activities rather than having a strategic focus

3.2.3 Approaches of Knowledge Management and Processes of Innovation

As mentioned in Chapter 1.1.1, learning is a prerequisite of successful innovation and sustainable tourism development. Although learning in the form of problem-oriented organisation of learning processes takes place every day, the importance of formalized structures of knowledge management is comparatively low in the NSR. There are many small entrepreneurs who lack awareness for the importance of knowledge management and also often do not have sufficient time to establish a system for retrieving information. Consequently, information is mostly retrieved informally. Tacit knowledge is of major importance in the regions.

At the Belgian coast, an important part of the knowledge management consists of knowledge dissemination towards the public i.e. the visitors. The *Beaufort Project* includes various measures to educate people about contemporary art and cultural heritage such as a walking guide or information tours.

To adapt to the (coming) changes in tourism development, knowledge transfer will become more important in the future.

Qualification

Tourism staff as co-producer of tourist experiences plays a vital role in tourism development in general, and the extension of the season in particular.

Regarding training opportunities for tourism staff, the situation varies between the Pilot Regions. While some have sufficient opportunities, there is lack of nearby training opportunities in most Pilot Regions. Tourism management courses are taught in universities which are situated in the bigger towns on the main land. For tourism professionals working on the islands the distances to the educational institutions is a barrier for qualification.

In Belgium, education and professional training for the tourism and gastronomy sector is provided in the two schools located in Brugge and Kortrijk. The Royal Institute Spermali in Brugge offers a Bachelor degree in Tourism. Students are involved in projects such as *Beaufort* and are provided practical experiences.

In Uthlande, sufficient opportunities for training in tourism management are lacking. Experts demand a wide range of qualification means including foreign language courses tailor made for tourism actors or a tourism academy to be established within the region. Qualification measures are often related to projects, such as the Biosphere or the programme *Regionen Aktiv* (Active Regions, supported by the Federal Government) in Uthlande.

In Fryslân, there are opportunities such as BA and MA in Leisure / Tourism Management at CHN but most of them are on the main land. People from the islands have to go to the main land for their training.

In Denmark, the University of Southern Denmark offers undergraduate and graduate education in international tourism and leisure management, and hospitality management. Moreover, business colleges offer relevant courses. However, most of the educational opportunities are scheduled during staff working hours. Due to the seasonality of tourism, almost all training takes place in winter during off-season, and hence only enables permanent staff to enhance its skills and knowledge.

A high staff turnover is recognised as having a negative impact on good communication and networking. The relationships once developed have to be re-invented with new staff members, a process which requires time and great effort. When the staff turnover is high, the overall competence of the institution is not growing.

In general, staff turnover is not a major issue. However, in the Danish Wadden Sea Region major challenges regarding the personnel constitute the lack of staff and high employee turnover encouraged by the favourable economic situation in Denmark, deficiencies in business competences and at times reluctance to change. Those aspects inhibit the delivery of high quality tourism experiences, which are the key for successful competition, as the Wadden Sea Region cannot compete in terms of prices.

In Uthlande, staff turnover is an issue only in areas with high costs of living. However, measures such as sharing responsibilities and information (transparency) ensure that replacement is easier.

Innovation

Innovation is predominantly viewed as product innovation. Innovation activities are generally directed towards extending the tourist season (Festivals, sports competitions etc.), improvement of information and booking systems, all-weather attractions, quality of accommodation and service, improving access and mobility by stimulating public transport infrastructure and adapting to demographic change (disabled visitors). Secured funding is important in order to get other people involved and to cooperate.

The innovation of *Beaufort* is linked to the artistic content and the (re)discovery and (re)evaluation of the coastal region and locations. The *Beaufort* projects do not only have an influence on the development of a coastal cultural identity but contributes sustainability especially by stimulating the

involvement of the local population by underlining the regional capacities and the attractiveness of the region.

Examples from the Danish WSR include thematic package combinations focussing on selected target groups such as bird watchers, cycling and wellness tourists as well as upgraded accommodation and attraction facilities. Further innovations relate to the creation of local, regional, national and international liaisons among actors from various industries to jointly develop new products such as a digital experience map consolidating information from a variety of sources into one database, or the development of a regional quality scheme "Wadden Sea Products".

Presently, innovations in the Danish Pilot Region are frequently initiated by individuals from attractions and hotels rather than by tourist offices. However, the enlargement of the municipalities and the appointment of a communal tourism director may strengthen the role of the DMOs.

Uthlande does not only have an innovative form of cooperation (IHKo) but has also introduced a label for sustainable tourism. The label "Nationalpark-Partner" – Partner of the National Park - is a quality label for enterprises that fulfil criteria in service, nature protection and environmental sound behaviour. They closely cooperate with the National Park Wadden Sea and provide visitors holidays close to nature.

All tourism professionals are considered to be innovators or at least followers. Innovations are hindered by the character and ignorance of the people, the small size of the businesses and their budgets, and spatial planning and legislation/rules.

Entrepreneurs on the other hand are in most parts of the region described as reluctant in taking up innovations. Financing and realisation of ideas takes long as they need third parties for the development of their ideas. Many activities are completely public funded. Hence, governments are an important external factor to stimulate innovation as well as knowledge institutions and cooperations.

3.3 Aspects of Sustainability, Innovation as well as Intra- and Interregional Learning Processes in the Pilot Regions illustrated by the Good Practise Examples

In the course of the Pilot Region analyses, 22 examples of good practise have been selected.

The selection followed two key criteria:

1. The Good Practise Examples should be widely accepted within the Pilot Region as exemplary concerning the region's sustainable development.

2. The Good Practise Examples should document effective and innovative interregional and international learning processes.

The Good Practise Examples have been evaluated with regard to the project's exemplary significance for the development of sustainable tourism and the project's contribution to innovation within the Pilot Regions as well as the existence of learning structures during the project's initiation, development and implementation phase. All Good Practise Examples are documented elaborately in the appendix volume "ToLearn – Background Investigations".

In the following, a summarising and systematising analysis of all Good Practise Examples is conducted on the basis of the project descriptions provided by the project partners, systemising the Good Practise Examples according to

> ➢ five priority fields of activity regarding sustainability issues,

> ➢ seven different motives underlying the initiation of innovative projects or processes and

> ➢ ways of how learning processes take place.

3.3.1 Good Practise Examples Contributing to Sustainable Tourism Development within the Pilot Regions

In consideration of the twelve aims for sustainable tourism developed by the United Nations World Tourism Organisation (UNWTO) and the United Nations Environment Programme (UNEP) as well as the eight key challenges formulated by the Tourism Sustainability Group (see Chapter 1.2), five priority fields of action have been defined in the context of tourism in the NSR:

➢ Preserving Natural Attractiveness

➢ Maximising Local Prosperity and Competitiveness of Tourism Destinations and Enterprises

➢ Reducing Seasonality

➢ Enhancing Accessibility

➢ Preserving and Profiling Regional Identity

Each of the selected Good Practise Examples can be related to at least one of these five fields. Due to the fact that the Good Practise Examples differ in their complexity, the number of sustainability issues addressed varies.

Preserving Natural Attractiveness

This field of action deals primarily with sustainability issues connected to the natural environment. The Good Practise Examples contributing to this field concern for example measures for environmental protection like the preservation of biological diversity and avoidance of landscape degradation, efforts in order to economise resources, to promote the use of renewable resources as well as to minimise pollution and the production of waste.

Furthermore, it comprises measures undertaken to inform the tourists and the local inhabitants about the challenges that climate and global change incorporate in order to develop an understanding for the necessity of landscape conservation and coastal protection as well as for the impacts their own activities can have.

The following eleven Good Practise Examples contribute to the different aspects of this field of action in varying intensity:

➢   Mopark - National Park 'De Alde Feanen' (NL)

➢   Solar Boat Race (NL)

➢   Wheat and Mustard Mill Ameland (NL)

➢   The Jærbeaches (N)

➢   The Green Key Program on the Belgian Coast (B)

➢   Coastal Barometer: Sustainability Indicators for the Belgian Coast (B)

➢   Coastal Tram along the Belgian Coast (B)

➢   Foundation for the Coastal Protection of Sylt (D)

➢   Biosphere Reserve 'Halligen' (D)

➢   Uthlande Regional Products (D)

➢   Infotainment Centre 'Forces of Nature' (D)

Mopark, the *National Park 'De Alde Feanen'* in the Netherlands, for example, contributes to the cross-national conservation of a rare landscape. This is achieved through the application of environmentally friendly technologies and transportation systems (solar boats, bikes, special touring cars etc.) within

the national park area on the one hand and a sound visitor management system on the other, largely relying on intensified information and education of the visitors. Similar can be assigned to the *Jærbeaches* in Norway and the German *Biosphere Reserve 'Halligen'* whose main objective is the creation and protection of a valuable cultural and natural landscape, in which people live conform to nature in a sustainable manner. The *Biosphere* contributes to the conservation of the natural heritage for future generations as much as the undisturbed development of nature. Manifold visitor information systems in the area, events and activities (e.g. shrimp-cutter excursions, bird-watching, guided bird walks, mudflat excursions etc.) facilitate nature experiences, human recreation as well as give visitors an understanding of the area's natural and cultural assets.

The Green Key Program on the Belgian Coast is a certification system for camp-sites that work towards reducing their impact on the environment and thus, ensuring high quality of the facilities as well as beautiful and intact surroundings. The program aims at encouraging local providers to take responsibility for the environment and to adjust their businesses towards a more sustainable development. Similar adheres to projects like the *Foundation for the Coastal Protection of Sylt* and *Infotainment Centre 'Forces of Nature'* on Sylt in Germany. Major field of action is the alarming situation of Sylt due to the imminent impacts of climate change on the island and its increasing exposure to North Sea storms. While the *Foundation* is primarily trying to encourage the local inhabitants and Sylt enthusiasts to become involved in additional coastal protection measures by sensitising them for the situation and making them understand the necessity for action, the *Infotainment Centre* takes up the function of playfully informing tourists and local citizens about the forces of nature, the process of climate change, coastal protection, marine biodiversity as well as the future of Sylt and the North Sea more generally.

All-embracing not only for environmental sustainability is the Belgian *Coastal Barometer*. On the basis of a set of sustainability indicators that have been jointly developed, the *Coastal Barometer* measures the degree of sustainability achieved and hence, supports the implementation of sustainable policies for the coast as well as of an Integrated Coastal Zone Management (ICZM). The information gathered is easy to understand, continuously updated and available to a broad user community.

Other effects contributing to the preservation of natural attractiveness can be identified in projects like the Dutch *Solar Boat Race* which stimulates the use of renewable resources like solar energy and thus, promoting the importance cleaner and more sustainable forms of transportation. Also contributing to the reduction of CO_2 emissions are the *Coastal Tram along the Belgian Coast*, putting emphasis on the promotion and enhancement of a public transportation system. In line with the promotion of *Regional Products from the German Region Uthlande,* supra-regional goods transports can be reduced which affects not only animal welfare but also the CO_2-bilance positively. The *Wheat and Mustard Mill Ameland* in the Netherlands is fully working on wind energy and therefore another good example for the sustainable use of resources. Furthermore, the information centre informs tourists about the mill-history in order increase their interest for and understanding of the challenges of the region.

Maximising Local Prosperity and Competitiveness of Tourism Destinations and Enterprises

This field of action deals primarily with sustainability issues connected to the economic development of the regions. The Good Practise Examples contributing to this field mainly focus on measures securing an acceptable economic basis and the international competitiveness of destinations and enterprises. In order to ensure economic viability, tourism development has to be in line with market trends and future demand. Competence needs to be developed to meet changing demands of the visitors successfully and to be able provide unique experiences of high quality that deliver value to both, the visitors and the local citizens. In this regard, the number and quality of tourism jobs needs to be improved and in order to improve the overall image of the sector, tourism has to benefit the quality of life in general. This can be reached by creating additional attractions and offers with a high visitor potential on the one hand as well as modernizing and optimising existing attractions on the other.

The following Good Practise Examples contribute to this field of action:

➢ *Competence Development in Danish Inns & Hotels (DK)*

➢ *ODA-Project: Experience Development of Danish Attractions (DK)*

➢ *Wadden Sea Products 'Vadehavsprodukter' (DK)*

➢ *Wadden Sea Festival 'Springflod' (DK)*

➢ *2006 Beaufort: Art on the Belgian Coast (B)*

➢ *Uthlande Regional Products (D)*

➢ *Cultural and Congress Centre 'Charlottenhof' (D)*

➢ *Infotainment Centre 'Forces of Nature' (D)*

➢ *Barrier-free Tourism Guide for the Islands of Amrum and Föhr (D)*

➢ *The Park of the King 'Kongeparken' (N)*

➢ *Care Farm 'Doniastate' (NL)*

➢ *Contemplation Centre Boksum (NL)*

➢ *Solar Boat Race (NL)*

The high number of Good Practise Examples attributable to this field of action emphasize the enormous importance of economic factors in regional tourism development. One good example for improving the competitive position of tourism accommodation is the project *Competence Development in Danish Inns & Hotels*. This project creates learning opportunities and supports the exchange of knowledge and experiences between the different stakeholders in the accommodation segment. The aim is to mutually develop ways to make use of the business potential effectively and competences that improve the accommodations' competitive position in the global market place. The *ODA-Project* has a similar objective in the context of tourist attractions. This *ODA-Project* successfully fosters the experience development of 38 Danish attractions. Main goals are the creation of internationally competitive attractions as well as the maintenance of the existing attractions in an economically prosperous and sustainable manner. To achieve this, a wide variety of quality experiences and user-oriented products, meeting the demands of the new customers are provided.

The promotion of regional products as described in the Good Practise Examples from Germany and Denmark, *Uthlande Regional Products* and *Wadden Sea Products 'Vadehavsprodukter'* contributes also to the improvement of the competitive position of regional businesses and the overall economic situation of the region. The stimulation of local agriculture and tourism offers secures and creates employment in the regions and enhances the regions' attractiveness. A new tourism profile has been created, accomplishing consumer wishes in order to attract new visitors to the region. This has positive impact on the income situation as well as the overall quality of life of the local people.

The Park of the King 'Kongeparken' in Norway and the *Cultural and Congress Centre 'Charlottenhof'* in Germany are both exemplary for singular projects contributing to the economic strengthening of the local economies of underdeveloped regions. While The Park of the King constitutes Rogaland's largest employer for young people, utilizing its revenues within Rogaland county, the 'Charlottenhof' revitalizes the remote region of Wiedingharde, offering attractive workshops, festivities, cultural events, concerts, theatre performances, crafts markets etc. to both, tourists and local inhabitants.

Coastal events also contribute to high degree to the economic prosperity of the specific regions. They are also contributions to the diversity of the tourist offer, often with the aim to create a new, unique and repetitive cultural event that is attracting a broad audience and potential settlers to the regions. Coastal events as being reflected in the Good Practise Examples are *2006 Beaufort: Art on the Belgian Coast*, the Danish *Wadden Sea Festival 'Springflod'* and the Dutch *Solar Boat Race*. In the framework of the *Beaufort* project, contemporary arts established along the whole coast are in the centre of the

endeavours, promoting the Belgian coast as place where cultural experiences re possible alongside relaxation and recreation. The focus of the *'Springflod'* festival is on the inseparable connection between culture and nature as well as the creation and strengthening of regional, national and international liaisons while the *Solar Boat Race* event contributes to the attraction of additional tourists, shaping Fryslân as water a sport territory.

Other new attractions can be dedicated to information and recreation, meeting new demands of the visitors or giving consideration to unprivileged groups within tourism. The *Infotainment Centre 'Forces of Nature'* in List on the island of Sylt is intended to become a contemporary centre informing playfully about the island's challenges and the forces of nature, sparking off additional economic value to the region (e.g. job opportunities). The centre has been developed in response to people's interests, hoping to gain additional visitors to the island in the future, especially addressing the segment of day tourists. A similar approach show the *Contemplation Centre Boksum* in the Netherlands. It provides a place for reflection and contemplation in a unique surrounding in answer to new customer demands, searching for new experiences and ultimate recreation. The *Care Farm 'Doniastate'* in the Netherlands offers tourism experiences for the disadvantaged tourism group of autistic children and their families. *'Doniastate'* provides tourism offers adjusted to the specific needs of these children and therefore contributes considerably to social equity within tourism.

Another Good Practise Example making use of the great potential of tourism offers for physically disabled people due to demographic changes is the *Barrier-free Tourism Guide for the Islands of Amrum and Föhr*. The guide can also be regarded as response to the decreasing number of tourists on the islands, enhancing the attractiveness of tourism sustainably, preparing for the future market.

Improving Accessibility

This field of action deals primarily with sustainability issues connected to tourism transport and the challenge of making tourism available for all. The two approaches are closely linked with each other. While the former draws major attention to developing and offering environmentally friendly alternative to car traffic which is still the dominating means of transportation, the latter addresses especially issues attributable to the two overarching aims of sustainable tourism, visitor fulfilment and social equity. A safe, satisfying and fulfilling experience without discrimination has to be secured. In addition to this, especially unprivileged groups of the society depend on alternatives to the car.

The Good Practise Examples contributing to this field of action describe three different approaches towards the matter:

> ➢ *Coastal Tram along the Belgian Coast (B)*
> ➢ *Barrier-free Tourism Guide for the Islands of Amrum and Föhr (D)*
> ➢ *The Bicycle Junctions in Fryslân (NL)*

The *Coastal Tram along the Belgian Coast* has been established as regular public transport service connecting the whole Belgian coast in order to encourage alternative and more environmentally friendly transportation. The establishment of the *Coastal Tram* can also be regarded as answer to regular traffic congestion and the lack of parking places. This public transportation system increases sustainable mobility as well as provides safe and barrier-free access (low-floor vehicles). Securing efficient, high-frequency operation all year round, it can be regarded an attraction in its own.

The *Bicycle Junctions in Fryslân* in the Netherlands enhance the accessibility of the region through the provision of bicycle renting networks. Easing the renting and returning process of the bikes through a tight network of cooperating junctions, the attractiveness of using the bicycle as means of transportation has gained in popularity.

The *Barrier-free Tourism Guide for the Islands of Amrum and Föhr* overviews the barrier-free accessibility of shops accommodations, restaurants, transport facilities, public buildings as well as recreational and service facilities. Apart from providing useful information for the handicapped, the travel-guide intended to initiate processes in the minds of the local providers and increased the awareness for the accessibility-related concerns of unprivileged groups when travelling on the islands. The goal is to optimise barrier-free attributes of tourist offers like beach promenades, beach access, children's playgrounds as well as sanitary arrangements. Furthermore, wheelchairs with balloon wheels for beach access shall be provided as a matter of course.

Preserving and Profiling Regional Identity

This field of action deals with sustainability issues connected to the preservation and creation of regional identity. The Good Practise Examples mentioned below concern primarily measures that strengthen the development and distribution of quality products and services based on the natural and cultural heritage of the regions. The aim is to ensure cultural richness and to preserve the cultural heritage of the regions as much as to sharpen and further develop regional profiles originating from tradition. Historic heritage, authentic culture and the distinctiveness of the host communities need to be preserved and profiled. Furthermore, to accomplish identification with and the acceptance of new attractions in a region, communities and local citizens have to be engaged in planning and decision-making as much as in the implementation of the new projects.

The following Good Practise Examples contribute to this field of action:

  ➢ *Wadden Sea Products 'Vadehavsprodukter' (DK)*

  ➢ *Wadden Sea Festival 'Springflod' (DK)*

  ➢ *Competence Development in Danish Inns & Hotels (DK)*

  ➢ *The Green Key Program on the Belgian Coast (B)*

  ➢ *2006 Beaufort: Art on the Belgian Coast (B)*

  ➢ *Uthlande Regional Products (D)*

  ➢ *Biosphere Reserve 'Halligen' (D)*

  ➢ *Contemplation Centre Boksum (NL)*

  ➢ *Wheat and Mustard Mill Ameland (NL)*

  ➢ *Cultural and Congress Centre 'Charlottenhof' (D)*

The development of internationally recognisable brands or labels like the Danish *Wadden Sea Products 'Vadehavsprodukter'*, the German *Uthlande Regional Products* and the Belgian *Green Key Program* support regional identity formation. While the all three brands or eco-labels contribute to a general quality increase and reinforce the positive image of the regions abroad, the regional products furthermore improve business opportunities for local producers and service providers. They help maintaining the characteristic regional landscape and encourage the local distribution and consumption of local produce. The regional food brands stand for high quality and ecologically sound produce in response to the increasing demand for healthy regional products due to the food scandals in the past years, especially in the meat and sausage industry. Other regional products cover the full range of possibilities comprising sea food as well as domestic goods like cheese, self-made jam, mustard, beer, dune syrup, corn, fruits and vegetables.

Similarly, the *Biosphere Reserve 'Halligen'* contributes to regional identity formation. The *Biosphere* enhances the corporate feeling among the holm residents. Educational projects emphasising and creating knowledge about the cultural and historical values of the holms, contribute even further to the identification of local scholars and residents with their homeland.

Competence Development in Danish Inns & Hotels aims among others at preserving and capitalizing the inns' unique cultural values. It makes efforts to raise the awareness of the inns' uniqueness, encouraging the preservation of cultural practise because culture is acknowledged as integral part of business competitiveness and sustainable development.

Unique costal events like the *Wadden Sea Festival 'Springflod'* and the *2006 Beaufort: Art on the Belgian Coast* that integrate the local landscape and the elements of nature actively into presentations of art are also good examples for stressing the unity of a region's natural and cultural values from which feelings of regional identity and togetherness are evolving. In some ways this selection of coastal locations and landscape elements in unison with the local history, invites even to (re)evaluate and (re)discover of the coastal landscapes.

Beyond it, reconstruction of historic buildings and their conversion into new uses contribute to high degree to the preservation of cultural heritage. The *Cultural and Congress Centre 'Charlottenhof'* , a 250 year old historic farm building in the German region Wiedingharde, for example, has been converted into a cultural centre that now contributes to the advancement of cultural activity in the region. To anchor this project successfully among the local population, the inhabitants of the village of Klanxbüll have been invited to actively participate in the maintenance of the historical and cultural diversity of the place. Based upon similar considerations, the *Contemplation Centre* in Boksum in the Netherlands, formerly a reformed church, was converted to its new use. The *Wheat and Mustard Mill in Ameland* in the Netherlands, however, retained its former function. Instead, the traditional production of mustard in the mill has been promoted as tourist attraction, accompanying the production process with informing the visitors about the historic past of the Ameland region and thus, preserving its identity for future generations.

Reducing Seasonality of Demand

This field of action deals with the important issue of strengthening the appeal of the off-season against the peak season. Important measures in this regard can be the development of innovative products, package offers and events as well as price differentials and incentives for travelling outside the tourist season.

The following Good Practise Examples contribute to this field of action:

> ➢ *2006 Beaufort: Art on the Belgian Coast (B)*
> ➢ *Barrier-free Tourism Guide for the Islands of Amrum and Föhr (D)*
> ➢ *Infotainment Centre 'Forces of Nature' (D)*
> ➢ *Coastal Tram along the Belgian Coast (B)*

The *2006 Beaufort: Art on the Belgian Coast* is one out of four Good Practise Examples contributing to the extension of the tourist season. Being run between April and October it does not only extend before and after the main season but is also meant to attract different socio-economic age-groups. Furthermore, as the local communities are offered to purchase the artistic objects after the event is finished, the possibility to experience the artworks will continue throughout the whole year.

The *Barrier-free Tourism Guide for the Islands of Amrum and Föhr* is another approach to heighten the utilization of guest capacities in the early and post-season, because it addresses target groups that are likely to travel outside the main tourist season. So far, the barrier-free quality inspection regards wheelchair users only but is to be extended to other mobility impaired people like visually and auditory impaired as well as pregnant women, mothers with babies, small children as well as elderly and weak people.

With the *Infotainment Centre 'Forces of Nature'* another attempt is made to attract tourists to an island outside the tourist season, providing year-round and weather independent offers. Same applies to the

Coastal Tram along the Belgian Coast. Due to continued frequency of operation even during less popular times of the year and at weekends, accompanied by specific events and attractions along the coast, the *Coastal Tram* contributes decisively to the attraction of visitors to the Belgian coast independent from the season.

3.3.2   Motives for Innovation Underlying the Good Practise Examples

Considering the motives for innovation underlying the Good Practise Examples, six different reasons for the initial spark can be differentiated:

> ➢ Necessity

> ➢ Fear of Irretrievably Losing Pieces of Regional Attractiveness

> ➢ We Should Do More

> ➢ There is a Request, But We Do Not Have Suitable Offers

> ➢ Copying and Repeating a Story of Success

> ➢ Findings from Discussions

The different motives for innovation have had influence on the learning processes in the Pilot Regions which will be summarised in Chapter 3.3.3.

In the following, each Good Practise Example is assigned to one of the motives, although there may even be more than one reason for the development in some cases.

Necessity

Certain problems are so urgent and pressing that new solutions have to be developed due to that fact. The problems can be either of economic, social or environmental nature. To cope with these problems, the persons responsible usually collaborate in order to jointly find solutions as well as develop innovative ideas.

The *Coastal Tram along the Belgian Coast*, for instance, is one good example relatable to this motive because it faces the imperfection of the public transportation system along the Belgian coast which marks one of the greatest barriers to tourism development. Furthermore, within the *Coastal Tram* project, the promotion of public transportation systems was successfully initiated as a solution to the insufficient car parks and the regular traffic congestion along the coast.

The fear of losing competitiveness by virtue of fierce economic competition, altering tourism demands for more individualized quality experiences or changing tourist compositions are other reasons making competence development as in the Good Practise Example *Competence Development in Danish Inns & Hotels* necessary. Competence development is an essential tool in order to compete successfully on the world market. The innovative concept of *Competence Development in Danish Inns & Hotels* acknowledges culture as an integral part of business competitiveness and sustainable development.

A good example for encountering environmental necessities is the *Foundation for the Coastal Protection of Sylt*. On account of the increasing heavy coastal damages, the municipal tourism services of Hörnum, Kampen, List, Rantum, Sylt-Ost, Wenningstedt and Westerland on Sylt, other associations like the traditional culture association Sölring Forinning and the German Hotel and Restaurant Federation DeHoGa Sylt as well as several local enterprises established the *Foundation for the Coastal Protection of Sylt*. Its main objective is to encourage Sylt enthusiasts and citizens for a stronger financial and more active participation in the coastal protection of the island. The foundation has a broad range of supporters stretching from the municipalities, local and regional politicians to local entrepreneurs, local citizens, scientists as well as neighbouring countries.

Fear of Irretrievably Losing Pieces of Regional Attractiveness

Similar to the first motive, the innovations in this category result from the pressure caused by the imminent, irretrievable loss of pieces of regional attractiveness. New solutions for historic buildings like old farmyards, mills, churches or old factories that have lost their original use but are important for preservation of the region's unique character have to be found.

The *Contemplation Centre Boksum* in the Netherlands, for example, has been established in a former reformed church at a historical location. The initiation as well as the whole conversion process from the development of the concept to the organisation of the reconstruction works has been undertaken by the private owner of the church.

In contrast, the conversion of the 250 year-old farmyard into the *Cultural and Congress Centre 'Charlottenhof'* in the German region Wiedingharde has been made possible through a public-private partnership between the enterprise Bockholt-Gruppe and the local community of Klanxbüll. The former owner donated the historic farm building to the municipality in 1998, accompanied by the wish to maintain it in its original shape. The combination of preservation and creation of a new attraction in a remote region has proofed successful. A broad public has now permanent access to a piece of regional identity.

Retaining its original use, the *Wheat and Mustard Mill Ameland* in the Netherlands is a combination of a traditional production centre and a tourist attraction which is thus preserving a piece of cultural heritage of the Ameland Region.

We Should Do More

'We should do more' highlights the fact that destination development *could* be enhanced even without external pressures. Tourism stakeholders cooperate in order to develop innovative ideas that contribute to the sustainable development of the regions.

The *Bicycle Junctions in Fryslân* in the Netherlands are, for example, a cooperation between the regions North-Kennemerland, West-Fryslân, Low Holland, Ijmond and North Holland in order to foster and improve tourism and recreation possibilities in the countryside and thus, contribute to the economic development of the region.

The international landscape architecture contest 'Growing Up Green' which is embedded in the Norwegian *Park of the King 'Kongeparken'* is another Good Practise Example to be assigned to the 'We should do more'-motive. The project has been jointly developed between the leading theme park in Norway, *'Kongeparken'*, the European Capital of Culture Stavanger 2008 and the Norwegian University of Life Science. It illuminates in an innovative way how natural surroundings can be used to promote physical activities where children are at the centre.

There Is a Request, but we do not have Suitable Offers

Initial spark for projects under this topic is the wish to broaden the variety of attractions and quality experiences in the region in response to the changing demand of the customers. The innovations concern not only the development of entirely new offers, tourism commodities and services but also the adjustment of existing ones to prevent insufficient competitiveness in the long term.

In this context, the *ODA-Project: Experience Development of Danish Attractions* follows an extraordinary approach. It aims at qualifying staff members of the attraction sector to contribute to the creation of missing offers and new opportunities for a sustainable tourism development. Innovations are encouraged by joint competence development. All personnel is involved in the development of new competences, product and management innovations as well as experience exchange. Thus, the creative approach is resulting from the interaction among individuals and groups in internal and external partnerships.

Addressing the lack in suitable offers for people with functional and mental restrictions, Anneke Wester and Reinder de Boer founded the Dutch *Care Farm 'Doniastate'* in 2002. Having the idea to provide autistic children and their families a special environment that has positive influence on the self-development of the children that visit the farm and enhances their self-esteem, they were responsive to the increased demand in tourism attractions for handicapped people.

Also the German islands Amrum and Föhr have become attentive to the necessity of increasing the number of offers for physically challenged tourists and the promotion of suitable offers. They have become aware of the great potential that offers for physically challenged people will have in future tourism. However, not only the social engagement of the islands but also economic considerations led to the publication of the *Barrier-free Tourism Guide for the Islands of Amrum and Föhr*. The travel-guide is also a measure in response to the declining numbers of tourists on the islands in the last years, hoping to be able to increase the demand again due demographic changes.

Dr. Mathias Strasser from the Alfred-Wegener-Institute was main initiator of the *Infotainment Centre 'Forces of Nature'* on the German island Sylt. He recognized that something was missing on the island reacting on both, the tourists and the residents' interest in the island and the forces of nature affecting it. He developed the idea to establish an infotainment centre with focus on the marine environment/ecosystems at the harbour of List, thus creating a modern tourist attraction that will certainly draw more visitors to northern Sylt in the future. To substantiate his ideas, he visited several similar establishments like Universum Science Centre Bremen, Multimar Wattforum Tönning, Meereszentrum Stralsund or Vadehavscentret Vestervedsted.

Copying and Repeating a Story of Success

The Good Practise Examples introduced under this headline have had successful forerunners whose concept have been taken up again and have been enhanced. The philosophy behind 'Copying and repeating a story of success' is to repeat something that has proven successful already but develop it more attractively and successfully.

For instance, several successfully repeated races with terrestrial solar vehicles served as models for the Dutch *Solar Boat Race*. It forms the antipode to the Elfstedentocht, a famous ice-skating marathon in Fryslân. The province of Fryslân took the initiative of development this contemporary event which is annually organized by the Foundation Sinneboatrace Fryslân.

The Danish *Wadden Sea Festival 'Springflod'* got the idea of integrating the nature of SouthWest Jutland into the presentation of contemporary art from the performance of the German theatre group 'Das letzte Kleinod'. In 2004, the theatre group was travelling through the Wadden Sea Area with their performance 'Sorr' which incorporated unique natural elements and local cultural assets and tools. The *Wadden Sea Festival 'Springflod'* was initiated by local entrepreneurs, artists and representatives of the local and regional government, recognizing the great potential of the creative acquaintance with the region's natural and cultural values. Furthermore, the festival encourages communication and cooperation across geographic and artistic borders, stressing the unity of the region.

Also the *2006 Beaufort: Art on the Belgian Coast* had successful forerunners that have been taken up and enhanced. The event has been organized by the non-profit organisation vzw Ku(n)st in collaboration with the Provincial Museum of Modern Art (PMMK) in Oostende and ten Flemish coastal communities. The original idea of *Beaufort* as a cultural event was created by Willy van den Bussche, the former head curator of the PMMK. Today, the province of West Flanders is driving force behind the *Beaufort* project.

After visiting the Dutch organisation 'Waddengoud' in 2006, the foundations for the Danish brand *Wadden Sea Products 'Vadehavsprodukter'* were lain. The development process was driven by two individuals who engaged a self-appointed working group in developing a strategy, setting up a homepage, designing a logo, securing funding and recruiting members. The initial idea for the

promotion of Wadden Sea Products was mainly to improve the competitive position of the area's businesses and to support regional identity formation. Especially disadvantages for businesses in peripheral areas should be reduced by that means due to the fact that the *Wadden Sea Products* do not only contribute to the promotion of regional products, but also to the development of new tourism offers and finally, to an enhanced image of the Wadden Sea region.

The *Green Key Program* is an international inspecting mark which started in Denmark in 1994. As it became apparent that the customers pay more and more attention to the ecological integrity, the *Green Key Program* was also developed *for the Belgian Coast*. The initiative came from private sector associations like 'Kempen Camp-Site', 'Flanders is Recreation' and several environmental associations. It is supported by Tourism Flanders, Tourism Province Antwerp and OVAM, the public waste product society of the Flemish district. The project is regarded especially innovative because of a special training programme that is provided for all those who are interested in upgrading their environmental quality criteria.

Findings from Discussions

Projects that emerge from ideas which were developed or advanced within the framework of discussions, workshops or committee meetings concerning the development of tourism are introduced under this headline.

For example, the National Park 'De Alde Feanen' in the Netherlands is a result of transnational experience exchange between eight partners in Europe within the framework of the MOPARK project. *'De Alde Feanen'* was officially recognised a national park under development in 2000 and aims at finding a balance between conservation and recreation within its boundaries.

The Jærbeaches in Norway were officially declared a landscape protected area in the Kongelig Resolusjion of 1977. The region is now successfully and jointly managed by the Regional Department of the Environment (RDE) and the Jæren Friluftsråd

When the UNESCO nominated the Wadden Sea coast as biosphere reserve, the holm residents implemented their idea to be included in the biosphere reserve in a self-determined bottom-up process. A delegation of holm inhabitants visited the Spreewald Biosphere Reserve and conducted interviews with biosphere experts and affected citizens to get an impression of how the *Biosphere Reserve 'Halligen'* could work. In collaboration with the National Park Office the holm inhabitants formulated the aims and ideas of their transition zone.

In response to the lack in active marketing measures for a local distribution of beef and other regional products, the nature protection foundation Fering Natüür on Föhr commissioned the Chamber of Agriculture in the Federal State of Schleswig-Holstein with a conceptual design for a regional marketing of Uthlande products within the nationwide program 'Regionen Aktiv'. The idea was to jointly develop corporate structures and product innovations in order to keep, increase and sustainably stabilize the added value of regional products in Uthlande. The establishment of a regional marketing was initiated due to an increased demand among the consumers. Through negotiations with producers, retailers, slaughters and tourism professionals the professional brand: *Uthlande Regional Products* could be developed and successfully marketed.

With the development the *Coastal Barometer*, Belgium pioneered in the development and implementation of 20 sustainability indicators for the coast. Initiated by the Coordination Centre for Integrated Coastal Zone Management (ICZM), the process started in 2000 under the impulse of the Flemish government and the province of West-Flanders. Several civil servants from provincial and Flemish administrations entered intensive negotiations and discussions as well as were involved in a series of workshops selecting the indicators in order to finally be able to pursue effective policies for the coast.

3.3.3 Intra- and Interregional Learning Processes Illustrated by the Good Practise Examples

Four different channels of intra- and interregional knowledge transfer that facilitate non-formal learning processes can be illustrated by the Good Practise Examples:

➢ Media-Based Knowledge Transfer

➢ Event-Based Knowledge Transfer

➢ Encounter-Based Knowledge Transfer

➢ Cooperation-Based Knowledge Transfer

In the following, these four types of knowledge transfer will be shortly introduced. The Good Practise Examples are assigned to at least one of these means of knowledge transfer to illustrate the different ways of how learning processes take place within the Pilot Regions.

Media-Based Knowledge Transfer

The most obvious way in which knowledge can be transferred is certainly media-based. Especially the still increasing importance of the Internet in this context has to be mentioned. Almost all of the Good Practise Examples regarding good cooperation and innovative learning solutions promote their projects via Internet websites and newsletters. In addition, public and media attention is attracted using conventional marketing tools like leaflets, image brochures, guides, programmes and posters as well as marketing channels like television and radio broadcasting, articles in magazines and newspapers or other national and international press releases (including press conferences) either informing the visitors about the projects, promoting special events or analysing and evaluating their outcome (their lessons learnt).

Successful examples for well-prepared media presence, marketing strategies as well as visitor information are for example *2006 Beaufort: Art on the Belgian Coast*, the *Coastal Tram along the Belgian Coast, the* German *Biosphere Reserve 'Halligen'* and the Danish *Wadden Sea Festival 'Springflod'*. The two brands marketing regional products, the Danish *Wadden Sea Products 'Vadehavsprodukter'* and the German *Uthlande Regional Products* have made great efforts in either distributing their products online, within the region as well as on tourism fairs and agricultural exhibitions or in the creation and distribution of information materials like image brochures (about the products) or short image movies. In the *Biosphere Reserve 'Halligen'* slide shows, storm-tide movies, self-chanted songs and readings on CD broaden the spectrum of media-based knowledge transfer and visitor information. The *ODA Project: Experience Development of Danish Attractions* completed its marketing activities with the publication and sale of manuals, e.g. a customer survey manual, analyses and guidebooks on selected aspects of development in attractions like strategy design, storytelling and experience development.

The knowledge transfer of the *Coastal Barometer: Sustainability Indicators for the Belgian Coast* is especially web-based. The majority information is spread via the project's interactive website. The Internet gives unrestricted access to raw and calculated data as well as background information. The data is updated permanently and available for policy makers, environmental experts as well as the general public. Technical sheets contain detailed information on each indicator. The publication 'The Coastal Compass' reflects the state of the Belgian coast and transfers the visions and objectives of and approaches towards ICZM in order to communicate the use of the indicators to the users.

Event-Based Knowledge Transfer

Less common than media influence is the transfer of knowledge via events. Events and special activities can draw attention on natural and cultural assets of an area as well as enable knowledge transfer between stakeholders involved in organising or the different people attending the event.

For example, while the contemporary arts festival *Beaufort*, taking place at the Belgian coast simultaneously draws attention to the coast and its challenges as well as to the local communities and culture, the *Wadden Sea Festival 'Springflod'* aims at the creation and stabilisation of regional, national and international partnerships between producers, tourism stakeholders, residents and the local communities as well as between local, national and international artists and cultural institutions and associations as well as geographic and thematic networks leading to product and institutional innovation. International competitions like the Dutch *Solar Boat Race* or the 'Growing Up Green' landscape architecture competition lead-managed by the Norwegian amusement park *'Kongeparken'* focus not only on attracting public attention but also on sensitising the audience and the participants for sustainability issues like renewable energies or the sustainable development of experiences for children. In contrast, the *Biosphere Reserve 'Halligen'* provides events and activities trying to give the visitors an extensive understanding of the area like excursions (seal and bird watching trips, mudflat hiking-tours), 'Ringelganstage' ('Brent Goose Days'), 'Biikebrennen' (traditional bonfires in winter) and others.

In addition to that, event-based knowledge transfer comprises also less attention-drawing forms of singular events like workshops, congresses and other arrangements putting the transfer of knowledge as central element to the fore. For example, the events for the *Wadden Sea Festival* were developed during a workshop with 25 stakeholders and an inspirational trip to the Wadden Sea. Already during this workshop preceding the actual events, knowledge and experience could be exchanged between the participants. The *Cultural and Congress Centre 'Charlottenhof'* tries to attract people to the region as well as to sensitise visitors as well as villagers for the region and the local history offering workshops, congresses, tutorials and markets and other events focussing on the transfer of local culture and tradition.

Encounter-Based Knowledge-Transfer

Encounter-based knowledge transfer is based on a variety of encounters of individuals. These encounters do not primarily include informal, personal meetings during which knowledge transfer occurs by the way, but also encounters that are rather participation- and training-based.

First of all has to be noted in this context that the initiation of several Good Practise Examples was preceded by different personal encounters that enabled knowledge transfer from already existing projects to prospective ones. For example, the planning process of the German *Infotainment Centre 'Forces of Nature'* on the island of Sylt was supported by discussions with people responsible in exemplary projects and similar establishments. To get suggestions and ideas, study-trips at interregional and international level were conducted. Finally, the encounters lead to intensified consultation with the *Universum Science Centre Bremen*. Similar applies to the development of the brand *'Vadehavsprodukter'*. Links to other projects with similar focus have been established in advance, leading towards a self-appointed working group developing a strategy, securing funding and recruiting members.

In the case of the *Uthlande Regional Products*, individual negotiations with producers, retailers, slaughterers etc. preceded cooperation and the professional development of the brand. At four round tables the involved agriculturalists were asked their opinion, ideas and wishes concerning the brand. In addition, inquiries were held among the customers to find out their willingness to buy the products. The German *Foundation for the Coastal Protection of Sylt* maintains a permanent dialogue with the population in order to draw attention on the needs of Sylt. Thus, personal communication channels are

established in order to sensitise local people as well as visitors for the process of climate change and coastal protection. In this context, contacts with scientists have also been established and cultivated.

The *Biosphere Reserve 'Halligen'* has set up a biosphere board that meets twice a year in order to jointly develop ideas, aims and models for the region. Each holm resident is invited to participate. Furthermore, regular excursions called 'Halliglüüd ünner sick' ('Holm residents among themselves') are organised in order to strengthen regional identity and to improve networking between the residents. In a similar way as the biosphere board focuses on participation, the *Barrier-free Tourism Guide for the German Islands of Amrum and Föhr* has been developed. All discussions, planning and decision making took place within the *Conference of Islands and Holms*.

The development of the *Coastal Barometer: Sustainability Indicators for the Belgian Coast* was based on broad public participation and their voluntary involvement in a series of talks and workshops concerning content and development of the sustainability indicators.

Another means of encounter-based knowledge dissemination is initiated by the formation of local associations in order to involve local people voluntarily in a development or maintenance process. This is the case in the German *Cultural and Congress Centre 'Charlottenhof'*, the Dutch *Wheat and Mustard Mill* on *Ameland,* the *Care Farm 'Doniastate'* and the *Contemplation Centre Boksum*. Only through the help of many individuals, motivated to transfer their knowledge to the tourists or to apply it during the reconstruction and conservation process, the projects could be successfully implemented. In the first two cases either the 'Friends of the Charlottenhof' or the 'Friends of the Verwachting' aim at converting the historical buildings successfully by voluntarily transferring their knowledge to the visitors, by supporting the project with their experience in technical solutions as well as giving financial support. Furthermore, the 'Friends of the Charlottenhof' try to activate the local population the help enhancing the cultural life of the region, to arrange the facilities for upcoming events as well as to help preparing and serving food or dinks voluntarily. The work of the association is praised as ideal participation process. In the latter two, the focus is rather on social learning processes and experience exchange. While on *'Doniastate'* mainly students on work placement volunteer to help and good ideas are exchanged between different establishments with similar aims in the form of working groups and visitors, the reconstruction workers in the *Contemplation Centre Boksum* are mainly people having to complete community service hours, who often feel sustainably affiliated with the project afterwards.

Training sessions in form of courses, seminars and study trips provide further circumstances in which encounter-based knowledge transfer occurs or is encouraged. For example, the Danish projects *ODA* and *Competence Development in Danish Inns and Hotels*, were relying on the advice from professional consultants, tourism professionals, developers, academics and practitioners, but were also taking into account the knowledge and experience of the participants, thereby fostering active learning and the establishment of long-lasting relations among stakeholders of the same sector and in the tourism sector in general. Mentor programmes have been set up to foster encounters additionally. While in the case of the competence development project the 19 teaching modules focused on the six themes service & quality, management through vision, service management, storytelling, marketing and branding and strategic management planning, the delivery of tailor-made courses in strategy formulation, business acumen, service management, development of experiences, communication and marketing as well as the organisation of study trips to Danish and international attractions and experiential discussion groups on competence development were on the *ODA* project's agenda. An intensive training program provided by Tourism Flanders was also launched in line with the *Green Key Program on the Belgian Coast*, easing the obstacles to participate. The extensive guiding program aims at explaining the sustainability criteria as well as activities for guests corresponding to the rules proposed to be awarded the Green Key label. The different project activities promote intra- and inter-organisational relationships considering and involving all personnel in order to maximise knowledge dissemination and thus, innovativeness.

Cooperation-Based Knowledge Transfer

A fourth way of knowledge transfer can be distinguished in the framework of continuous committees, partnerships and networks. Cooperation-based knowledge transfer is characterised by regular contacts between the stakeholders. The knowledge transmission taking place in these contexts is usually contributing to concrete fields of action and often project-oriented and targeted.

The establishment of networks and partnerships is a common concern in the vast majority of the Good Practise Examples. Usually different public and private institutions and enterprises like tourist and cultural associations and foundations, local authorities and communities, environmental organisations, local transport services as well as regional tourism stakeholders and local people cooperate in order to be able to develop a project jointly and sustainably. This is for example the case for the *Coastal Tram along the Belgian Coast (B)*. In this project, cooperation between the Flemish region and private partners is seen as one of the key factors of success. While the Flemish region consults local councils, municipalities, provincial authorities as well as affected ministry departments, the private stakeholders include museums, aqua parks, organizers of festivals and events. Combined tickets contribute even to the transnational cooperation with France and the Netherlands. With the Coastal Tram, fruitful effects are achieved in the interest of all stakeholders involved: it stimulates mobility as well as increases the understanding of sustainable tourism.

The development of the *Barrier-free Tourism Guide for the Islands of Amrum and Föhr* involved cooperation between the municipalities' tourism services on Amrum and Föhr, local transportation companies as well as all relevant tourist entrepreneurs, cultural and social affairs. The association for handicapped people "Unterwegs ohne Grenzen" was finally commissioned with the realization of the travel guide.

In the framework of 2006 *Beaufort: Art on the Belgian Coast* various sustainable collaborations between different Flemish institutions and enterprises (the Agency for Nature and Forestry, the Coastal Heritage Foundation, the public tram and bus transport company De Lijn, the Belgian railways company etc.) as well as tourist and cultural coastal administrations have been stimulated. The partnerships support for example the development of sustainable tourism at the coast. While the official authorities provide guidance for the project, cultural and tourist departments are responsible for communication and promotion of the project. Engineering departments provide technical assistance. The communication structure is regarded as very effective. In the context of the *Infotainment Centre 'Forces of Nature'* networking processes of a diverse set of stakeholders in the coastal region have been encouraged. All Sylt municipalities, nature protection associations as well as scientists have been involved in the planning process. Furthermore, experience exchange between official departments, technical authorities, interest groups and private persons has been initiated. The partners meet biweekly to further work on the projects realisation.

The *Bicycle Junctions in Fryslân (NL)* set up cooperative bonds between the Frisian provinces North-Kennemerland, West-Fryslân, Low Holland, Ijmond and North-Holland in order to take the advantage to establish the networking system synchronously across the provinces. The Danish *ODA-Project* focuses mainly on thematic networks, but also creative employee networks and international networks to other attractions have been established successfully.

The establishment of the Dutch *National Park 'De Alde Feanen'* resulted from intensive transnational cooperation within the INTERREG IIIB NSR project *MOPARK*. In the framework of *MOPARK*, eight European partners collaborated with local authorities and the provincial association for nature management 'It Fryske Gea'. Knowledge and experiences on new techniques to improve sustainability as well as on the distribution of information and communication were exchanged cross-borderly.

Synergies could also be achieved through the cooperation between the Wadden Sea National Park, the *Biosphere Reserve 'Halligen'* and the sustainable tourism sector. These could even be intensified through partnerships ('National Park Partner'). Thus, visitor services could be optimised and the provision of information improved.

For the two Danish projects, the *Wadden Sea Festival 'Springflod' and the Wadden Sea Products 'Vadehavsprodukter'* project coordinators have been employed whose task it was to coordinate internal and external communication as well as the experience exchange between the different stakeholders of the projects.

4 The Implementation Projects

Based on the detailed analysis of the Pilot Regions one innovative activity in each Pilot Region strengthening the sustainable quality of tourism has been selected. During the project and in the future, these activities will receive support from the partners in charge in terms of their implementation. This means, that the implementation has been organised, its progress will be monitored and its success evaluated.

The results of the implementation of these innovative projects was evaluated and used in workshops, which provided assistance to similar projects of the project partners and other persons, who are involved in the process of tourism in the project partners` countries.

For a long-lasting outcome of the projects which can be used by other tourism stakeholders as well, the lessons learned during the Implementation Projects were condensed into toolkits. These toolkits, to be presented in Chapter 4.3, are supposed to stimulate learning processes among regions and destinations through communicating successful innovative activities.

4.1 Introduction of the Implementation Projects

In this chapter the so-called Implementation Projects will be briefly introduced. They are projects which have been found successful in yielding innovative strategies to support sustainable tourism in the regions of the ToLearn partners.

Beaufort, Belgium

Beaufort is a contemporary art festival on show along the Belgian coast. The first edition of this festival has taken place in 2003 and since then it is organised every three years. The project is divided into two sections: *Beaufort Inside*, which takes place in the Museum of Modern Art (PMMK) in Oostende and *Beaufort Outside*, which is located in various coastal communities.

Mainly organised by the Vzw K(u)nst and the UGhent this project was build up by several different stakeholders like the tourism organisations of Flanders, the coastal municipalities, the government and De Lijn as public transportation service.

Its aim is not only to enforce coastal tourism in Belgium but also to stimulate the development of image building of the whole region of West-Flanders. *Beaufort* is supposed to strengthen the local economy as well as the tourism and culture development. With this project a cultural art event could be brought not only to all parts of the Belgian population but also to a significant number of international guests.

Because of the relatively high costs for the artworks and the uncertainties regarding their maintenance of recovery it has not yet been "exported" to the bordering countries like France and the Netherlands.

For further information please check the documentation of the Implementation Project in the appendix volume *ToLearn – Background Investigations* or www.beaufort03.be (Januszewska & Viaene 2008).

New mobile technologies to improve location based tourist communication, Denmark:

The Danish Implementation Project developed a model for place-based communication in tourism. Information should be handed over via Internet and mobile phones instead of paper maps and other print products. One of the main aspects was to use the emerging possibilities in marketing and communication that follow from electronic location-based information as the major communication medium. The aim of the project is to meet the desire of tourists to be continuously informed about thematic aspects such as heritage tourism and nature related information. It wants improve the

development of information on the Wadden Sea area in a digital format and provide this information to potential and actual guests.

A demonstration case for this project has been set up in cooperation with a local action group on the island of Fanø, located in the Danish Wadden Sea, where a nature restoration project is going to be established. In the area of the demonstration project a small lake will be created between two parallel lines of dunes with a shelter for bird-watching. Because of the protected status of this area, the visitor information is communicated by location-based services on e.g. mobile phones instead by signposts. For this area a GPS-guided walk was created. With this technique tourism could be allowed even in environmentally sensitive areas.

For further information please check the documentation of the Implementation Project in the appendix.

NordseeRouten, Germany

NordseeRouten is an internet based, georeferenced multimedia travel guide for the region of Uthlande. Instead of focussing on single destinations it provides information to the tourists on a regional scale.

All elements are georeferenced and displayed on an interactive map which is based on a web-GIS (internet based geographic information system). In addition to searching for a geographic locality on the map, the user can search for content by name and by topic or interest. Themes like culture, history and natural features are displayed as well as typical tourist information like places of excursions and view points. In addition to photos and texts the project focuses on short video films and panoramas to communicate the content and to enable a first visual sight of the region.

The concept of *NordseeRouten* implies the integration of people interested in participation, allowing them to participate in current technical developments like web mapping, location-based services and internet TV without regarding their financial background. To keep the costs of implementation as low as possible, the whole concept of the project is realised with open source software, which is free to use for everybody.

For further information please check the documentation of the Implementation Project in the appendix or www.nordseerouten.de.

Toerdata Noord, Netherlands

Toerdata Noord is a monitoring system for tourism in the North Netherlands. Its objective is to provide detailed information which gives policy makers the opportunity to create adequate tourist development projects. The survey started already in 1996, initiated by the Institute Service Management of the CHN University (now called Stenden University) and has been developed until today to a structural monitoring system commissioned by the three Northern Provinces in the Netherlands.

The system entails two surveys: the "Consumer report" ("Consumentenonderzoek") which is accomplished every three years and the annual survey "Tourism in numbers" ("Toerisme in Cijfers").

The consumer report analysis collects data of day tourists and overnight guests concerning their behaviour like e.g. choice and booking behaviour, holiday behaviour and the appreciation of tourists who are visiting the region. The consumer data is collected by surveys on the spot throughout the whole region.

The annually report "Tourism in numbers" includes data concerning the supply side. Aspects like capacity, occupation rates are analysed as well as e.g. information regarding tourist employment or the number of visits of day attractions and events. This data is collected directly from the accommodation providers of all sizes and not only in accommodations of more than 40 bed places as in the national statistics.

The data of both surveys can be analysed per accommodation sector, per province and per tourist region and, where possible, trends comparing previous reports are stated as well.

For further information please check the documentation of the Implementation Project in the appendix or www.ismweb.nl.

4.2 The Role of Implementation Projects for the Advancement of Sustainable Tourism and Innovation

Each of the Implementation Projects mentioned in the preceding chapter faced the challenges of supporting sustainable tourism in the NSR in a different way and with a different innovative approach.

As already mentioned in Chapter 2.3.3 tourism is not the most innovative sector compared to other industries. Innovations might be implemented in other industries long before they reach tourism. However, the approach of the described projects is innovative not only in the region where they were designed but probably in the whole NSR as well.

To strengthen sustainable tourism, innovative processes using new information and communication technologies have been started by the Danish and the German projects. Even though their focus lies on different aspects they both integrated the interactive use of GPS-data into their projects to create new ways of communication to the local people and to people visiting the region.

The Danish project focuses on the integration of the (local/regional) natural, cultural and historical environment into new mobile information strategies and systems. With the introduction of new information and communication technologies to the stakeholder community a cross-sectoral and interdisciplinary exchange of knowledge and information is supposed to take place. The spread of information via new technologies should increase the awareness of nature among local residents and visitors of the region. This will lead to the smarter use of and behaviour in nature. The sustainability of this project will be increased by the fact that the negative visual impacts (like e.g. signposts) can be minimized due to the use of the mobile devices. Because of this, natural and cultural aspects in the region can be experienced by the visitors without any restriction as well as the environment will not be disturbed by permanent external influences (Nielsen 2008).

The innovative German Implementation Project "*NordseeRouten*" focuses on the introduction of a georeferenced content management system in the internet which is used as a travel guide. The content is structured by the proximity of the users' interests. One of the most important aspects of the travel guide is the georeferenced map, on which the whole content can be displayed and the visitor can navigate through the website. The project includes every destination in a region such as Uthlande which wants to be part of the system; thus it strengthens the attractiveness and publicity of the whole region without neglecting the single destinations. Trough increased communication with the destination the visitors not only get a better understanding of the local population but the system might as well serve as an approach to strengthen the identity of the region. Because of the use of open source software, even smaller regions with low budgets can benefit from the developments. Especially in destinations where other approaches to communicate the cultural and natural aspects failed (e.g. because of the accessibility of the region), the travel guide will increase the spread of information and can even be used for visitor direction in sensitive areas. Due to the possible integration of all destinations the economic stability of the region may be strengthened because smaller destinations also contribute to it not only the large, already well known resorts. The dispersion of the regional income is another aspect which could result from the integration of all destinations in this project (Galonska 2008).

Instead the integration of innovative technologies as used in the Danish and the German project, the innovative approach of the Belgian case focuses on the link between art and the (re-) discovery of the coastal regions in Belgium. To succeed with this project, new communication structures and platforms for the different stakeholders had to be built up. The structure of the project succeeded in being a tool

of education both for the local population and the visitors of the region. Moreover, it also enhanced a diversified tourism along the shore. Because of this project the region became more than a recreational destination but also a location for people who enjoy contemporary art and look for offers of this kind. This fact did not only stimulate the tourism economy because of the increasing number of visitors in the region; it also broadened the tourist season at the Belgian coast. The integration of the project into the region strengthened the local identity enormously. Because of the involvement of the coastal towns along the whole coastline, the project did not strengthened just one single part of the coast but the whole region. The integration of the local transport into the project met the needs of the visitors of *Beaufort* because of the increased accessibility of the region without own means of transport (Januszewska & Viaene 2008).

The Dutch Implementation Project, on the other hand, focuses on the compilation and monitoring of relevant data in tourism on a regional scale. In contrast to existing data collections concerning tourism, the data provided by *Toerdata Noord* can be evaluated on a detailed statistical level which is not reached by the official statistics. The presentation of the data per province, per region, split up by accommodation category is unique in the Netherlands. A specific information request for certain regions can be dealt with because data is stored on different scales in this project. For the tourism planning process statistical instruments like this are highly beneficial. Due to the comparable surveys of *Toerdata Noord* during the preceding years, trends in tourism can be inferred and analysed for the future. Due to these trends policy preparation and further tourism development may now be planned on a profound basis. Developments which might result in negative impacts for the economy and the environment can be stated early because of these trend-analyses (Postma & Kasper 2008).

Overall, the important impact towards sustainability in tourism gained from the Implementation Projects is obvious. Even though the projects address the sustainability aspects on different levels and from different angles, every project is apt to significantly strengthening tourism sustainability of its own region and beyond. Of course, further development of the projects' features and capacities may yield even more benefits for the regions in the future with respect to sustainable tourism.

4.3   Recommendations to Enhance the Implementation Projects' Transferability

The implementation projects described above all went through specific phases of development and implementation to become successful projects. To follow the idea of the ToLearn project, regions should be able to learn from the experiences of others when initializing new projects on their own. The following toolkits are a first step to provide experience, thus helping new regions to set up their own projects.

***Beaufort*, contemporary art festival on show at the Belgian coast (Belgium)**

Box 4.1: Toolkit derived from the Belgian Implementation Project Beaufort (adopted from Januszewska & Viaene 2008)

Participants:

1. Include stakeholders from different sectors (stakeholders from politics (all levels), tourism, cultural institutions, transport and media).

2. Involve the local economy e.g. restaurants/hotels through cooperation with the project.

3. Try to find organisations that are sponsoring the project, e.g. participating coastal cities, the Flemish government (culture, tourism and public works) or the federal government via the National Lottery.

4. Get other partners (e.g. Toerisme Vlaanderen, Westtoer, media partners) to sustain the project through common communication actions.

Implementation:

5. Look for a region where you can embed the project in the local history and combine it with a re-evaluation and re-discovering of the area.

6. Promote the project area as one region respecting the identity of each town.

7. Build platforms of cooperation and especially of communication at different levels like:

    a. political platforms of cooperation between mayors and local politicians

    b. communication platforms of cooperation between departments of tourism and culture from each of the municipalities

    c. technical platforms of cooperation between local staff in order to bring artworks to various locations, to protect and conserve them

8. Promote your project in combination with other aspects of the area via national and international press.

9. Use open channels of media partners for your promotion. This is reducing the costs for promotion.

10. Look for assistance guidance from the authorities to obtain the necessary permits.

11. Increase the collaboration between communication and promotion for example with implementing a consultative platform with tourists and cultural departments.

New Mobile technologies to improve location-based tourist communication (Denmark)

Box 4.2: Toolkit derived from the Danish Implementation Project "New mobile technologies to improve location based tourist communication" (adopted from Nielsen 2008)

Participants:

1. Integrate stakeholders from different organisations and institutions e.g. museums, destination management organisations, municipalities, stakeholders with specific knowledge like e.g. IT-specialists or nature guides as well as local people with a specific knowledge of the region.

2. Inform the stakeholders of the possibilities and chances of the integration of new technologies. Introduce new information and communication technology to all stakeholders, which they were previously not familiar with.

3. Keep negotiating with the stakeholders during the process and try to include their ideas into the project. Do not forget that it is their region you want to implement the project in.

4. Get expertises concerning e.g. sustainability and finances to become aware of the impact and to ensure the practicability of the project.

Implementation:

5. Make sure the mobile phone coverage is given throughout the whole region as it is an essential precondition for the project.

6. Be well aware of the developments in GPS technology, the convergence of devices and the implications for tourism – use Internet to provide coordinates and map data to those interested, even if they are still a minority.

7. Do not get blinded by the possibilities of new technologies, rather focus on what is used by central segments of visitors AND to what first movers are taking up to.

8. To be prepared for new technologies you have to have relevant and well edited content to provide.

9. Try to implement electronically available materials from museums and teaching institutions in tourist information and marketing.

10. Initialise a common data structure among partners interested in providing information through a common, flexible system.

11. "Think big – start small!" Reach partial goals and make them accessible to the public as soon as possible after the project has started instead of waiting until you finished the whole project after years of development.

12. Include learning aspects (e.g. about heritage and nature) into the structure. Do not let it be just a tourist guide!

***NordseeRouten*, internet based multimedia, geo-referenced travel guide for the German region of Uthlande (Germany)**

Box 4.3: Toolkit derived from the German Implementation Project "Nordseerouten" (adopted from Galonska 2008)

Participants:

1. Look for an expert with a good knowledge of open source software as well as the ability to modify the software so that it meets the needs of the project.

2. Get the stakeholders of the destinations involved (municipalities, management organisations, tourist organisations, local activity groups, museums etc.).

3. Communicate the different functions of the system to the stakeholders and explain, if necessary, the technical background and the advantages this system can bring to them – now and in the future.

4. Your neighbour is not your enemy! Convince the stakeholders (especially the tourist organisations of the smaller destinations that common problems can be solved together.

Implementation:

5. Do not stick to any boundaries when defining the region. This system is defined by the information available and the stakeholders of the destinations who are interested in it.

6. Integrate small destinations with a small budget to give them the possibility to be represented on a technical level which is up to date.

7. Organise your data in a well structured database (e.g. PostgreSQL). Content Management Systems (CMS) are helpful for entering the information and making them visible on the Internet.

8. To be able to integrate the content into an interactive map, ALL contents have to be geo-referenced.

9. Integrate different ways to find the content on the website like e.g. search by name, by topic/interest or by geographical position.

10. Focus on the development of the interactive, geo-referenced map instead of compiling long menus.

11. Keep the development of mobile phones with GPS functions in mind. Location based services will become more and more important in the future.

12. The destinations have to commission the integration of their region into the system. The costs are depending on the size of the region and on the media (photos, films, panoramas) being used.

Toerdata Noord, detailed monitoring system for tourism in the North Netherlands (Netherlands)

Box 4.4: Toolkit derived from the Dutch Implementation Project "Toerdata Noord" (adopted from Postma & Kasper 2008)

Participants:

1. Look for reliable partners from provincial administrations and/or provincial tourist boards and build cooperation to commission the surveys. Discuss with them the data requirements for the monitoring of tourism for the purpose of policy evaluation/ preparation and/or marketing evaluation/preparation.

2. At least one of the partners should have very good contacts/relations to the stakeholders (e.g. accommodation providers) in the region.

Implementation:

3. Check if there are similar projects in your country you can cooperate with (e.g. similar structure of questionnaires to obtain comparability).

4. Check if the data you are going to collect for the region is not already collected by somebody else in the same accuracy.

5. Make a proper plan and budget and try to look for financial sponsors. If possible the commissioning partners are financially responsible. Make regulations (contract) about the ownership of the data that will be collected and the use and distribution of the data.

6. Collect the data at its origin (e.g. collect the data for consumer surveys from tourists throughout the region on the spot, instead of asking the accommodation providers for their support).

7. Try to collect data from accommodation providers by internet e.g. with the help of www.netquestionnaires.com.

8. Design the consumer questionnaires in a way that is possible for automatic scanning (e.g. with the help of Teleform) or try to collect consumer data by PDA (personal digital assistance).

9. Make sure the questionnaire allows a data presentation concerning the aspects you want to use it for (e.g. analysis regarding kind of accommodation, region, capacity etc.)

10. Get somebody into the project who has specific skills to handle big databases from the very beginning.

11. Organise and store the data in a way that ensures flexibility so that specific information requests can be dealt with. In practise this means that data have to be stored at the lowest aggregation level possible (e.g. postcode area, municipality, etc.).

12. Use a set up of the survey which is suitable for several years. Link between the past, presence and future within the project to discover trends.

13. Cooperation with experts to analyse the data concerning certain aspects can help to improve the quality of results.

14. Disseminate the results in a report both on paper and on the internet. Specific cross-sections of data could be produced on request if that is admitted according to the contract and if it is paid for (e.g. for specific parts of the region, for specific market segments, etc.)

4.4 Recommendations to Support Adaptation and Diffusion

Even though the Implementation Projects presented in the preceding chapter have different approaches, similarities during the implementation process can be found. Similar basic structures during the developing process show, that the projects are confronted with similar problems which should be solved.

Participants

One of the most important aspects during the development of the Implementation Projects is the involvement of the stakeholders. The integration of stakeholders from different organisations and administrative levels into the project can provide precious details about what aspects have to be kept in mind while implementing the project. Try to have at least one partner from each field of action in the project.

The outcome of the project often depends on the collaboration of the stakeholders within the region. In order to encourage them to become an active part of the project the best way is to involve them from the very beginning. The communication between the initiator and the stakeholders to get feedback during the planning process is as important as the communication between the stakeholders. Find groups with similar interests and enable a regular communication to exchange ideas and first results as early as possible in the process. The partners have to be informed about the ongoing project continuously.

Be aware that establishing useful channels of communication with the relevant parties or experts (as well as getting feedback) can be a tedious process which has to be considered in advance.

Do not hesitate to contact experts if you run into problems you cannot solve yourself.

Implementation

Get detailed information about the challenges which the project is going to face. Be aware of the preconditions which are essential for the project and check if they are available in the way you need them. Make sure you do not neglect any dimension when checking the preconditions. Aspects like competitors, technical development and availability, behaviour of the guests, political restrictions and the attitude of the relevant stakeholders (e.g. the local population, mayors, local action groups, tourism organisations) have to be checked in advance.

A broad and constant communication is crucial and helps you to become known to the people you want to address to. Try to use open channels of the media and if possible, promote your project with other aspects of the area to increase your publicity.

For many projects technical aspects are highly important. They open possibilities for the further development. Watch closely on the new developments but do not forget to focus on the main objectives of the project. Keep the focus on what is needed by your target group or on what enables you to handle things easier.

Watch out for other projects, which are similar to yours and look if they solved problems you are facing within your own project. A share of knowledge can be helpful for both sides and maybe even collaboration is possible to save resources, costs and developing time.

Because of different requirements and premises of the projects mentioned, instructions have to be generalized to meet the needs of those people who would like to set up a project themselves. More detailed advices can only be given by project partners. Constant communication among stakeholders enables the project to meet the needs of the participants from the beginning and to keep their support in the future.

5 Recommendations & Implementations

5.1 Foundations: Earlier Approaches, other Projects and the EU Agendas for Tourism Learning and Innovation in a Regional Context

The recommendations from this project are based on various sources (Fig. 5.1):

- ➢ The findings of the analysis phase, mainly the Statistical Report, the Challenge Profiles, the Pilot Region analysis, the Good Practise Examples and the Implementation projects,

- ➢ the implementations and experiences of the ToLearn project itself,

- ➢ earlier findings from Learning Region and Learning Area approaches and selected relevant projects,

- ➢ the EU Agenda for a sustainable and competitive European Tourism as a general guideline.
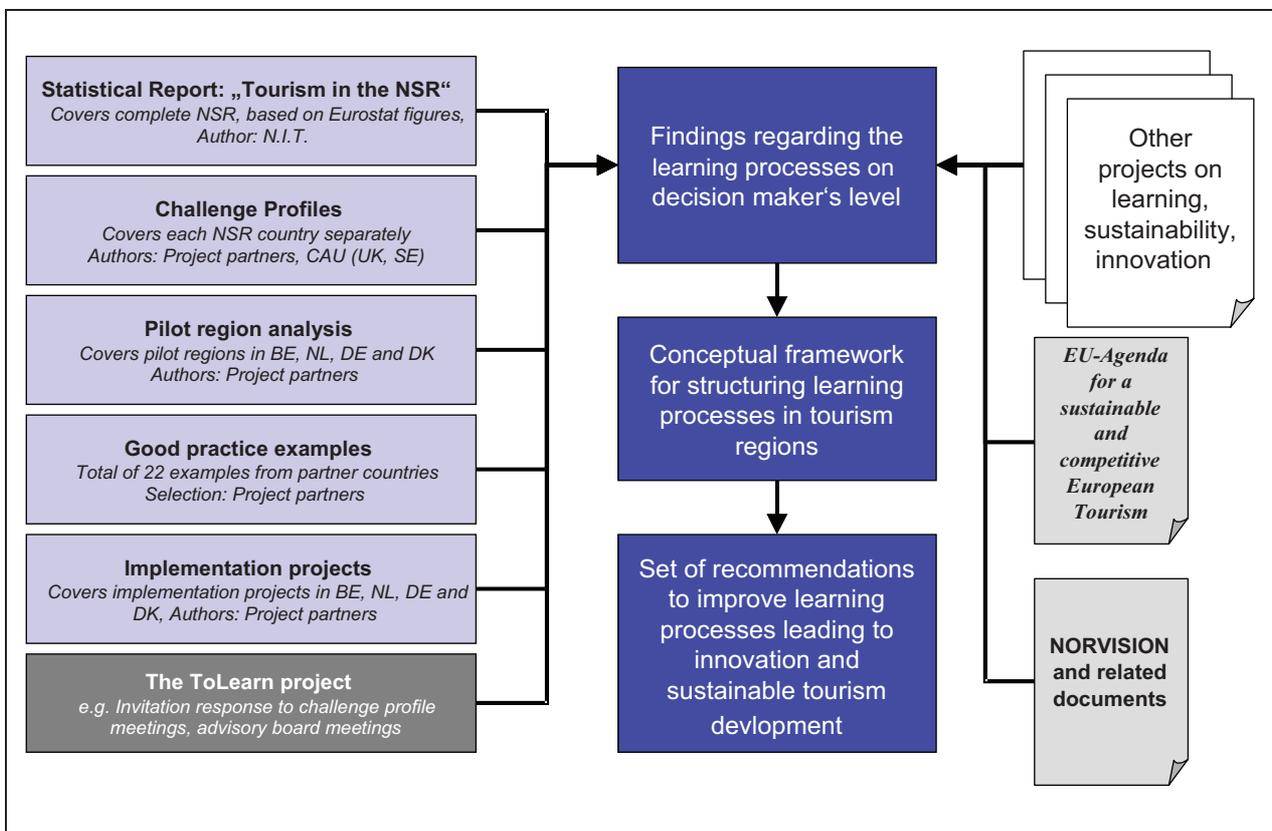
Figure 5.1: Foundations for recommendations and implementations (ToLearn)

From these four sources of information, the recommendations in this chapter are being derived. For a better understanding, the key findings from our information sources are being summarized within this first paragraph.

5.1.1 Key Findings from the Analysis Phase

From the basic information resources in the analysis phase of the ToLearn project, we derived the following key findings with regard to learning processes:

1. To the majority of decision makers, sustainable (i.e. balanced) tourism development issues are only relevant if they generate sufficient economic benefits (e.g. guests, sold bednights, turnover, added value).

2. Learning is a prerequisite of successful innovation and sustainable tourism development.

3. Substantial learning is taking place every day, focussing on the problem-induced and solution oriented organisation of learning processes.

4. The solution orientation basically prevents consecutive learning processes and frequently leads to starting from scratch.

5. Today's learning processes within the region are primarily non formal and can be better characterised as either „experience exchange" or directed or non-directed search for good practises.

6. The use of and the interest in formal learning processes (i.e. courses, seminars or long-term structured approaches) is relatively low on the level of decision making. However, there seems to be a lack of suitable (informal) learning opportunities for the decision-maker's level.

7. A formal „Tourism Learning Area" or "Learning Region" approach cannot be found throughout the NSR.

8. Search for good practises takes place rather in a short term perspective (i.e. "knowledge on demand") than in a long term perspective (i.e. "knowledge on stock"). This of course is different for basic knowledge being acquired during vocational training.

9. Exchange of Experiences goes on constantly; decision makers in the regional context (but not necessarily all entrepreneurs) are meeting each other regularly in different contexts, but mainly without visiting seminars or courses. Although meetings do not necessarily imply a valuable exchange of information, the useful impact of casual communication within the framework of formal meetings has been frequently reported.

10. Only few initiators can provide the impetus for projects and innovations – and thus be able to involve many in a more formalized way.

11. At an interregional or even international level, there are even less opportunities to establish learning processes compared to the intra-regional level. However, suitable opportunities for information exchange are the sine qua non condition for any learning process.

12. The statistical base for destination oriented decisions (like maintaining or establishing public or private infrastructure and services, distribution of subsidies etc.) on the NSR level is heterogeneous and rather unreliable (often incomplete, not comparable and not easy to access).

It should be noted that the analyses and hence the key findings from the analyses focus on the decision making / executive level in politics, government and destination management. For the non-executive level, there are obviously other learning mechanisms in place.

5.1.2 Key Findings from the Implementation of ToLearn

During the course of the project, various groups of stakeholders had to be involved. The formulation of the Challenge Profiles has been supported by personal or group interviews. The Advisory Boards backed the project by advising the project partners and commenting the results. People living and working in the Pilot Regions supported the project partners in the analysis phase. Further stakeholders have been involved and interviewed to formulate the Good Practise Examples and implementation

projects. In the course of the project, more than 100 stakeholders have been involved in one way or the other. This of course is a positive result.

However, most of the project partners reported of some difficulties to motivate decision makers to participate in one of the project's boards or panels. In many cases, achieving the necessary quality and number of attendants to the meetings and voices for the comments could only be reached because of the existing networks of the partners, but not because of the importance the stakeholders attributed to the field of sustainable tourism development in general and learning processes in particular.

5.1.3   Learning Regions, Tourism Learning Areas and other Relevant Projects

From previous research projects there is a number of magnitude knowledge to be considered in the ToLearn project. Naturally, this is not the place to list all relevant projects, approaches and solutions to foster sustainable tourism development[6].

Both the *Learning Regions* and the *Tourism Learning Area* approaches have been discussed since the 1990s[7]. For the Tourism Learning Area approach, the European Commission published a comprehensive handbook in 2006. Both approaches show a considerable amount of top down standardisation, sophistication and even formalism, whereas the findings from the ToLearn project show quite different needs from the practitioner's point of view. Therefore, Learning Regions and Learning Areas, including the Tourism Learning Area handbook, can hardly serve as preferable models for the implementation of tourism learning processes in the NSR.

The Nordic Innovation Centre's *PLIP* project (Nordic Innovation Centre 2006) deals with Peripheral Localitites and Innovation Policies. The main recommendation from the project is to focus on "good practise networks": These networks shall consist of one receiving and one already practicing network combined through an intermediary. Within the study, the authors underline the importance of a bottom up perspective.

The project *Innovation systems in Nordic tourism* (Nordic Innovation Centre 2008) deals more specifically with the tourism industry. The authors find, among others, some characteristics for successful tourism innovation systems:

➢ a multitude of actors,

➢ a diversity and density of relations,

➢ mobilising role of key actors,

➢ an open resource access,

➢ second comers to innovation being promoted,

➢ keen competition.

The *Agora* project[8] focuses on sustainable tourism development in the Baltic Sea Region and has been approved as a Baltic 21 lighthouse project. One very successful outcome from this project was a sustainability check for tourism projects. Based on the Nine Objectives for Sustainable Tourism (Fig. 5.2), the project developed a comprehensive, yet very compact checklist for judging the degree of sustainability a tourism project features within a reasonable time frame. This may serve as a good example for concrete and practically deployable learning instruments.

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[6] for an overview see websites like EEA's DestiNet Sustainable Tourism Information Portal: http://destinet.ew.eea.europa.eu/

[7] see Chapter 1 of this report for more information on these approaches

[8] Agora Network sustainable Tourism Development in the Baltic Sea Region: www.agora-tourism.net

Economy	Society	Environment
Strengthen local/regional economy	Satisfaction of most stakeholders impacted by project	Minimise resource use
Employment of local people	Participation of local people in decisions	Reduce environmental load
Sustainable capacity planning	Respect for local/regional culture	Preserve biodiversity

Figure 5.2: Nine Objectives for Sustainable Tourism (from *AGORA*)

The *CREST* project[9] produced a toolkit with recommended actions for creating a sustainable tourism destination. The toolkit does not contain any reference towards learning processes as a prerequisite for sustainable development. It does, however, underline the importance of local co-operation for a sustainable tourism development.

5.1.4   EU Agenda for a Sustainable and Competitive European Tourism

The EU Agenda (COM 2007) builds on the report of the Tourism Sustainability Group, a group of 22 experts from industry associations, destinations and civil society. The TSG report was finalized in February 2007, so that a public consultation could be held between April and June 2007. As a consequence, the European Commission adopted the Agenda as a basis for its tourism policy.

The Agenda explicitly refers to the UNEP/UNWTO guidelines to sustainable tourism development (UNEP/UNWTO 2005), which states as its credo "All tourism should be more sustainable".

With the agenda, the EU aims at the sustainable development of European tourism through fostering innovation processes.

The EU Agenda focuses on four major areas of action for the European Commission:

- ➢   mobilising actors to produce and share knowledge,
- ➢   promoting destinations of excellence,
- ➢   mobilising the EU financial instruments,
- ➢   mainstreaming sustainability and competitiveness in Commission policies.

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[9] CREST Creating sustainable tourism destinations: www.crestprojectm.com

Producing and sharing knowledge (i.e.: learning) shall primarily be achieved through

> ➢ the promotion of good practises,
> ➢ offering practical initiatives,
> ➢ improvement of tourism education,
> ➢ alliances between different types of destinations,
> ➢ strengthening and creating (electronic) platforms, incl. the annual European Tourism Forum,
> ➢ collection and provision of statistical and geographic data.

Within the following chapters we will comment on and specify these guidelines where appropriate.

5.2 Recommendations from the Project: General Guidelines and Concrete Action

The recommendations derived from the foundations in paragraph 1 of this chapter are being divided into two groups:

1. General guidelines describing what is important when setting up learning processes.
2. Concrete action ideas building the bridge to implementation.

All recommendations and action ideas primarily address the decision maker's level in politics, government and destination management. This is a result of the key findings from the analysis phase (cf. Paragraph 1.1 in this chapter), which focused on the learning processes on the decision makers' level.

5.2.1 The General Guidelines for Tourism Learning Processes

The general guidelines are mostly independent from the specific audience.

1. **Learning is a necessary prerequisite for innovation. Innovation can foster sustainable tourism development.**

   Learning itself has prerequisites, namely the existence of opportunities and impulses and the consideration of the audience's objectives and. inducements.

2. **Be as practical and demand oriented as possible - Respect the needs of the markets and the motivations of people.**

   From this project it can be learned, that learning processes trying to foster sustainable tourism development must not be academic exercises. Whoever thinks about the implementation of learning processes with the goal of changing the behaviour of decision makers (in a more sustainable direction) should respect their needs and motivations. The needs are context specific and the motivations usually are not focused on sustainable tourism development which is in most cases not a value in itself for most of the stakeholders.

3. **Use good practises wherever possible - Focus rather on informal than on formal learning processes for the management level.**

   One of the most helpful learning processes can be described as "good practise learning". The possibility to draw from a fount of best, good (and maybe bad) practises and experiences is attractive for decision makers in politics, government and the industries alike. Seminars, courses or the implementation of other formal structures like Learning Regions and Learning Areas usually do not reach the same level of acceptance.

4. **Bring stakeholders from different perspectives together - Implement only those learning opportunities that adhere to the needs of the intended audience.**

Inducements for the implementation of learning processes can either be based on intrinsic („I want to know") or extrinsic motivations („I have to learn"). Monetary incentives can usually foster extrinsic motivations, but not intrinsic motivations. However, money can help to make opportunities that fit into the motivational system of the intended audience. One of the main intrinsic drivers for learning is curiosity in solutions that have already been found for problems analogous to the own momentary challenges.

5. **Regional scope: Give proof of the positive impact of regionalized tourism marketing.**

This guideline is especially viable when private institutions like entrepreneurs and companies shall be addressed with learning processes. Quite often, the perspective of the entrepreneurs and stakeholders is limited to the own business. It is crucial for the involvement of entrepreneurs and companies into regional learning processes that they accept the fact that a collaborative approach might not have individual advantages in the short term, but rather in the mid and long term. "Your neighbour is not your enemy".

Strengthening the coherence of a given region is another guideline for the implementation of learning processes. Results show, that it is much easier to implement practical learning when the audience has a higher grade of involvement and affiliation with their own region.

6. **Implement uncommon learning solutions.**

One of the barriers for learning processes might be the relative lack of creativity in knowledge transfer. However, there is a number of uncommon techniques and methods that can be used in learning processes (e.g. business games, creativity techniques, web based solutions, competitions). The use of the classical learning and moderation schemes (like cards and pinboards, "Zukunftswerkstatt", seminars, conferences) or other common forms of group moderation and knowledge transfer seems to become more and more fatiguing for the audience.

These general guidelines shall serve as corridors not only for the action ideas in the next paragraph, but also for any implementation of tourism learning processes within the NSR.

5.2.2 Concrete Action Ideas for the Improvement of Tourism Learning Processes throughout the NSR

As opposed to the general guidelines, the concrete action ideas are audience specific. Therefore, we distinguish recommendations for the following groups:

1. Destination management: Destination Management & Marketing Companies, Industries & SME (lodging, transport, leisure, incoming agencies, tour operators), Business development organisations, investors and project developers

2. Politics and government: National and regional governments, EU institutions, Local councils and governments

3. Education: Higher Education institutions like universities, colleges, private education organisations, others

The reason for this differentiation is that the three audiences have different requirements, perspectives and work practises with regard to learning processes:

In Politics and government, it is mostly a broad and generalized perspective on tourism development. Tourism development is only one of many fields that have to be dealt with. It is true that in many coastal areas, tourism is the most important sector of the local economy. However, politics and government tend to think more holistically. Furthermore, politics and government in many cases (also)

have a regulatory responsibility. It is true that modern governments usually take the role of service units for their stakeholders. However, a certain regulatory and financial perspective has to be taken into account: As a rule, it is politics and government that define the path of and pay for the tourism development of and practical destination management within a tourism area.

Destination management, on the other hand, is much more focussed on tourism development and the practical and executive side of running a tourism area. The perspective is very frequently that of a stakeholder and representative of the local tourism industry.

Educational institutions, like Universities and others, can play a specific role in the definition and implementation of learning processes. They should provide the methodological and technical knowledge necessary for an advancement of tourism learning processes in the NSR.

Action Ideas for Destination Management

The action ideas for Destination management address five central fields of learning:

- ➢ Bi- or multilateral studies
- ➢ Learning on the job
- ➢ Use of social software
- ➢ Improvement of marketing and target group knowledge
- ➢ Exchange of destination related information.

Box 5.1: Action Ideas for Destination Management

D1	**Establish knowledge exchange through bi- or multilateral joint studies**
	Rationale: Knowledge about consumers and target groups is quite frequently restricted to results from ad hoc studies in the own region. An action idea is therefore to expand well established consumer research methodologies to a inter-regionally or internationally comparative basis.
D1a	**Joint mystery shopping studies**
	Rationale: One possibility to establish comparative results are mystery shopping studies. In theses studies, the services of tourism institutions (like tourist information offices, hotels, transportation facilities etc.) are being tested in a covert way. The mystery shoppers report the results in a uniform way, so that comparisons between different subjects are possible.
	Prerequisites: Network of destination management and tourism related stakeholders (P3)
	Responsible audience: DMO Destination Management Organisations
D1b	**Joint guest surveys**
	Rationale: Standardization of guest surveys (questionnaire, methodology, reporting) is quite frequently realized within a region, but not between regions. This prevents the comparison of results, namely tourist structures and behaviour (source market, transportation, spending motives etc.) in different destinations.
	Prerequisites: Network of destination management and tourism related stakeholders (P3)
	Responsible audience: DMO Destination Management Organisations

D2	**Learning on the job**
	Rationale: As stated in P2b, training on the job can give completely new perspectives to employees and decision makers. Training on the job can be done actively (by moving into a new setting) or passively (by getting new colleagues or coaches in the usual setting). Both way seem to be promising for the tourism development in the NSR.
D2a	**Learning on the job through staff exchange**
	Rationale: Active training on the job happens by moving people into a new working environment. This, however, drastically reduces productivity, because a given workforce cannot fulfil its tasks in the usual place. One option to reduce productivity losses would be an exchange of employees at more or less similar job levels.
	Prerequisites: Network of destination management and tourism related stakeholders (P3)
	Responsible audience: DMO Destination Management Organisations, Industries & SME (lodging, transport, leisure, incoming agencies, tour operators)
D2b	**Coaching programs**
	Rationale: Coaching can happen through professional trainers / coaches or through colleagues from similar organisations, but from different regions. Coaching in the second meaning would be a very direct, yet innovative form of experience exchange in destination management.
	Prerequisites: Network of destination management and tourism related stakeholders (P3)
	Responsible audience: DMO Destination Management Organisations, also Industries & SME (lodging, transport, leisure, incoming agencies, tour operators)
D3	**Use social software to improve on-demand knowledge exchange giving everbody the chance to share knowledge**
D3a	**Setup user generated content-sites like blogs, forums or wikis**
	Rationale: The use of social software is constantly growing and ever new applications appear on the web. The key success factor of social software is the fact that it changes the Internet from a passive to an active medium. Social software applications allow it for everybody to actively participate in the sharing of knowledge. On the technical side, there are numerous applications for different formats (like text, picture, video, audio) and sharing mechanisms (like wikis, forums, blogs and others) available.
	Prerequisites: However, the fruitful use of social software has three central prerequisites: First, high involvement of participants with the subject of the platform; second, a person or institution that serves as a trigger or driving force for such a platform; third: a minimum number of participants, probably several hundred throughout the NSR
	Responsible audience: DMO Destination Management Organisations, also Industries & SME (lodging, transport, leisure, incoming agencies, tour operators)
D4	**Join forces to improve marketing and target group knowledge**
	Rationale: The Challenge Profiles show, that some of the target groups can be found throughout most parts of the NSR and are therefore relevant for destination management and tourism industries throughout the NSR destinations. These target groups comprise families with younger children (under 14) and comfort oriented best agers. At the same time, there seems to be a number of source markets relevant to more than one destination in the NSR.

D4a	**Exchange of target group knowledge**
	Rationale: Destinations within the NSR are competitors in relevant markets. At the same time, destination managers are usually ready to share relevant knowledge. The reason behind this is the insight that (geographically or psychologically) distant source markets can be addressed more efficiently in a joint effort. A prerequisite is the knowledge about common target groups and different approaches to deliver optimum services to these target groups.
	Prerequisites: Network of destination management and tourism related stakeholders (P3)
	Responsible audience: DMO Destination Management Organisations
D4b	**Exploration of chances for joint branding (efforts) in (parts of) the NSR.**
	Rationale: In some of the analyses, experts suggested a joint branding effort for the NSR region with the intention to market the NSR region under a common label and brand. However, other experts fear that such a brand would not be able to fulfil the requirements usually imposed on a marketable brand (e.g. quality assurance). Therefore, a learning process focussing on these different opinions should be initiated. The learning process could be implemented in the form of a congress or hearing in combination with the use of social software.
	Prerequisites: Organisation or at least network of destination management and tourism related stakeholders
	Responsible audience: DMO Destination Management Organisations
D4c	**Collective trade fair stands in selected source markets**
	Rationale: As shown in D4a, a common market development can be useful for destinations in the NSR. Trade fair stands in selected source markets (like the Alps region) can be a valuable first step to joint marketing efforts.
	Prerequisites: Organisation or at least network of destination management and tourism related stakeholders
	Responsible audience: DMO Destination Management Organisations, also Industries & SME (lodging, transport, leisure, incoming agencies, tour operators)
D5	**Transnational and continuous exchange of destination related information**
D5a	**Destination newsletter exchange**
	Rationale: A learning process which is very easy to implement could be the simple exchange of destinations newsletter. Practically every Destination Management Organisation has its information channels towards the stakeholders in their own region. Possible language barriers should not be overestimated: Tourism of all industries should employ people having at least a basic command of their neighbours languages.
	Responsible audience: DMO Destination Management Organisations
D5b	**Using networks on the local level (twin cities, "Slow Towns" etc.) as a toehold**
	Rationale: Between twin cities there already are a sometimes strong relationships in existence. The same is true for established networks between towns, cities and communities (e.g. Slow Town). These networks can be used a toeholds for the necessary network expansion. Prerequisite is that destination management organisations know about the existing networks.

Action Ideas for Politics and Government

The actions ideas for Politics and Government address three action fields:

- ➢ Data based monitoring system
- ➢ On-demand knowledge exchange
- ➢ Network building.

Box 5.2: Action Ideas for Politics and Government

P1	**Establish reliable and easy-to-use / easy-to-understand data based monitoring systems with open access to everyone in politics, government and the industries**
	Rationale: Access to accurate and reliable data is essential for every demand oriented learning process. One of the key findings was, that "the statistical base for destination oriented decisions (like maintaining or establishing public or private infrastructure and services, distribution of subsidies etc.) at the NSR level is heterogeneous and rather unreliable (often incomplete, not comparable and not easy to access)." This is true particularly for those data sources covering more than one region / country.
P1a	**Harmonize EUROSTAT tourism statistics**
	Rationale: The heterogeneity of EUROSTAT data is problematic for the actual use in destination management. EUROSTAT data on tourism give only a rough overview of actual tourism demand and supply. Furthermore, there is a significant time delay (further information in Chapter 2.1 of this report)
	Responsible audience: EU institutions
P1b	**Explore and install an electronic monitoring set to harmonize NSR tourism data**
	Rationale: One possibility to complement the EUROSTAT, national and regional statistical databases would be the implementation of a NSR tourism data monitoring system. The monitoring systems has to be flexible and streamlined to the needs of actual users in destination management, politics and governments. The monitoring system can incorporate the named sources and add other, less structured sources like reports, charts etc. Role models or first initiatives with more regional scopes can be found in some parts of the NSR (e.g. Toerdata in the Netherlands, T-Fis in Germany, GuideDanmark or videnomturisme.dk in Denmark, Kustbarometer in Belgium).
	Prerequisites: Main barrier for this approach is the lack of a suitable organisation being able to integrate the needs of tourism stakeholders within the NSR.
	Responsible audience: EU institutions, national and regional governments
P2	**Facilitate on-demand knowledge exchange for tourism development**
	Rationale: One of the key findings was, that *on-demand learning processes* are more broadly in use than *learning on stock*.

P2a	**Funding of knowledge exchange (general funds, not tied to a specific project)**
	Rationale: One of the main disadvantages of EU funded (e.g. INTERREG) programs working with knowledge exchange is the absence of ad hoc funding possibilities. Instead, elaborate project applications, time-consuming approval mechanisms and a relatively high rate of overhead project management is involved in these projects. For on-demand learning, this procedure is way to complex, uses too much resources and too much time.
	If there were a funding scheme for knowledge exchange that could be easily tapped and which could be covering travel and networking costs, chances are high, that on–demand learning processes would be fostered considerably and learning outcomes would be much more suitable to the actual needs of stakeholders. This funding should resign from the need of fixed project partners.
	Responsible audience: EU institutions, national and regional governments
P2b	**Funding for training on the job**
	Rationale: Training on the job is being judged as one of the most efficient and effective ways of learning. However, it takes some effort to a) find partners and b) overcome possible financial restrictions in planning a training on the job time of several weeks or months. Therefore a suitable funding scheme, particularly for the interregional and international exchange of on-the-job-trainings, should be implemented.
	Responsible audience: EU institutions, national and regional governments
P3	**Help NSR tourism managers and stakeholders to get to know each other (network building)**
	Rationale: The key findings show, that there are well functioning networks within a region. Networks, however, are quite limited when it comes to inter-regional or even international level. Apart from projects (e.g. within the INTERREG framework) with the above mentioned restrictions, there is little opportunity for interregional and international networking.
P3a	**NSR tourism fair / congress for destination managers**
	Rationale: One possibility is the implementation of a periodical tourism fair or congress for tourism stakeholders in the North Sea Region. A setup with a predefined congress schedule for several years and changing venues would be imaginable. The congress should give sufficient possibilities for unconstrained networking.
	Prerequisites: Main barrier for this approach is the lack of a suitable organisation being able to integrate the needs of tourism stakeholders within the NSR.
	Responsible audience: EU institutions, national and regional governments
P3b	**Electronic NSR tourism relationship platform (like Xing, LinkedIn)**
	Rationale: In addition to the congress (P3a), an electronic networking platform would be a suitable means of support in this field. Role models like Xing or LinkedIn exist and can easily be adopted or serve as a container for an tourism NSR platform. The platform would need several months or even years to get sufficient popularity. Crucial is the need for information benefits to gain popularity within the not yet existing community. Therefore, it would be wise to parallelize this platform with the tourism data monitoring set (P1b).
	The website http://destinet.ew.cca.europa.eu can serve as either a role model or integrative framework for such a platform.
	Responsible audience: EU institutions, national and regional governments

P3c	**Study trips**
	Rationale: Study trips are a time-tested means of bringing people from different regions into contact. Study trips are one of the main knowledge exchange mechanisms in INTERREG projects. In combination with the learning-on-demand funding (P2a), study trips can be organised either unilateral or on a mutual basis. As in P2a, for easy use with practitioners there should be a funding scheme which is much simpler than current interregional or European funding options.
	Responsible audience: EU institutions, national and regional governments

Action Ideas for Education

The action ideas for Educational institution touch two different action fields:

➢ University co-operation

➢ News ways of learning for professional audiences.

Box 5.3: Action Ideas for Education

E1	**Establish university co-operation focussing on NSR tourism**
	Rationale: Throughout the NSR region there is a number of universities and colleges offering higher education in tourism. Some of these institutions worked together in the ToLearn project, other could easily be identified. A theme specific exchange between these institutions, however, is quite sparse.
E1a	**Implement lecturer exchange program / Mini placements for lecturers**
	Rationale: In the same way as the practitioners in politics, government and destination management, also students and lecturers can profit from knowledge exchange. One way to organise this form of learning is the exchange of lecturers between participating institutions. Mini placements resemble the lecturer exchange programs, only on a more short term basis.
	Responsible audience: higher Education institutions working on NSR (sustainable) tourism
E1b	**Student exchange and trainee programs**
	Rationale: as described in E1
	Responsible audience: higher Education institutions working on NSR (sustainable) tourism
E1c	**Establish a NSR Sustainable Tourism Excellence Cluster**
	Rationale: There is a number of Universities within the NSR working on the field of sustainable development and tourism development. Some of these institutions work together in the ToLearn project, others could probably be identified. A cluster approach to a more stable network on sustainable tourism development could strengthen the academic approach towards this issue.
	Responsible audience: higher Education institutions working on NSR (sustainable) tourism
E2	**Establish new ways of learning for international professional audiences on selected issues of NSR tourism**
	Rationale: Higher tourism education institutions could make use of their professional training possibilities in a broader way than it is being done today.

E2a	**Setup professional training webinars**
	Rationale: A webinar is a "web based seminar" quite frequently used in different industries when it comes to long distance learning. Webinar subjects and contents must be prepared in such a way that participants can easily follow the seminar through the internet and media specifics are being observed.
	Responsible audience: Higher Education institutions working on NSR (sustainable) tourism
E2b	**Setup tourism work camps**
	Rationale: Tourism work camps can serve as a practical replacement of conferences or seminars with input from educational institutions. Purpose of a work camp is to work together on a given task.. Work camps usually take 1-3 days.
	Responsible audience: Higher Education institutions working on NSR (sustainable) tourism

5.3   Implementation: Institutions and Processes

For the implementation of the guidelines and action ideas mentioned above, in general the stated audiences should feel responsible. However, there is a need to transport the idea of the guidelines and actions to the appropriate audiences and to increase the probability that any of the recommendations given here have a chance to get implemented.

In the case of EU institutions, this seems to be relatively easy: the ToLearn project has been substantially funded by the INTERREG IIIB NSR programme, therefore the EU institutions should obtain the results and findings through official ways.

In the case of other (i.e. national and regional) political and governmental institutions, destination management companies or even companies and entrepreneurs, their dissemination has to follow other paths. In the NSR there is a co-ordinating body that could serve as the primary multiplier for action ideas like those stated in this document. This compares to institutions and mechanisms known from other regions:

> ➢ In the Baltic region, there is Baltic 21, a regional multi-stakeholder process for sustainable development initiated in 1996 by the Prime Ministers from the eleven member states of the Council of the Baltic Sea States (CBSS). CBSS has been established in 1992. Within this framework, BTC (Baltic Sea Tourism Commission), initiated 1983, a non-profit organisation of more than 80 institutions and companies in the tourism sector, aimy at the development of tourism in the Bal-tic Sea area (see www.balticsea.com for more information). The Baltic Sea Tourism Commission forms part of the Tourism Task Force of the Baltic 21 Tourism Sector.

> ➢ The Nordic Council, established in 1952, is a co-operation between five Nordic countries and three autonomous territories. One of the Councils instruments is the Nordic Innovation Centre (NIC), also working on innovation and sustainability issues.

> ➢ In the Mediterranean area, META and MTU (Mediterranean Travel Association / Mediterranean Travel Union), founded in 2005 and based in Aix en Provence / France, aim at organising meetings and dissemination of information (see www.meta-tourism.com for more information). The Pacific Asia Travel Association (PATA) was a role model for the establishment of META.

For the NSR, the North Sea Commission (NSC) is the primary body of political co-ordination and co-operation. Members of the NSC are sub-national regions in most countries around the North Sea (see Fig. 5.3). "The North Sea Commission was founded in 1989 to facilitate and enhance partnerships between regions which manage the challenges and opportunities presented by the North Sea.
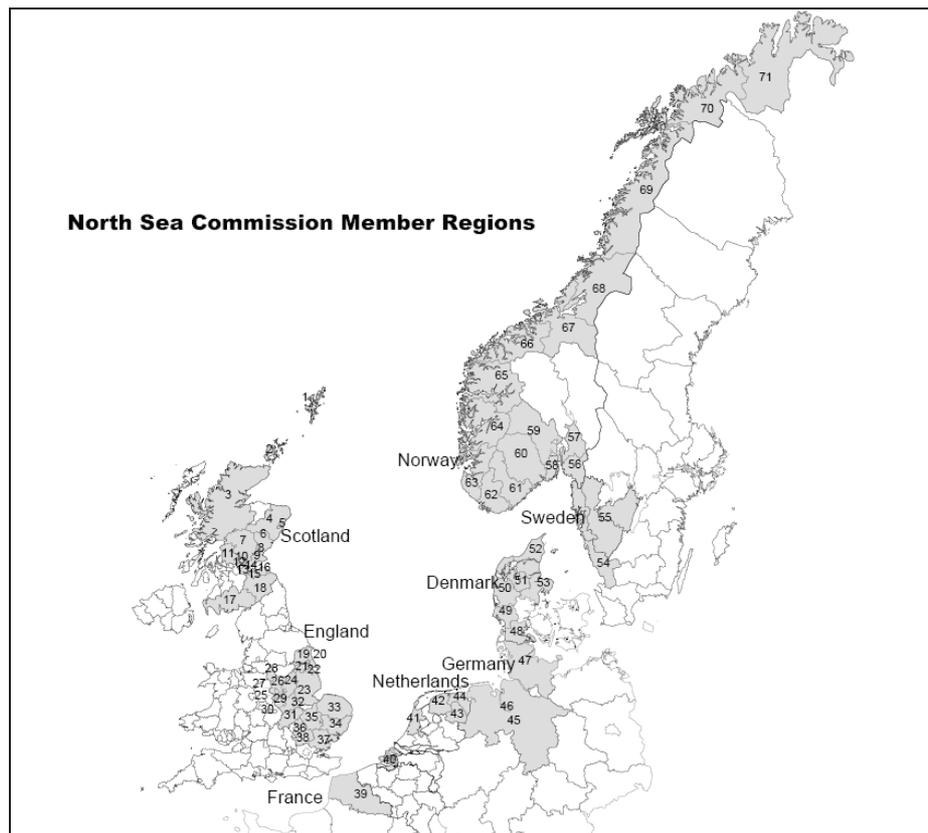
Figure 5.3: North Sea Commission Member Regions
        (www.Northsea.org/nsc/documents/members/member_map.pdf, (June 30, 2008))

Furthermore, to promote the North Sea Basin as a major economic entity within Europe, by encouraging joint development initiatives and political lobbying at European Union level." (www.Northsea.org). The North Sea Commission is one of seven Commissions under the umbrella of the Conference of Peripheral Maritime Regions (CPMR, wwww.crpm.org).

Within the NSC, there is a Culture & Tourism Group, which held its latest meeting in April 2008 in Bergen (NO).

As we have emphasized in the prerequisites section of most of the recommendations, a functioning co-ordinating body for (sustainable) tourism development in general and tourism learning processes is needed to implement the guidelines and action ideas described in this document.

The question, whether the NSR is a suitable layout for the implementation of such a co-ordinating body and whether the NSC could be a suitable organisational framework, can not be answered within the ToLearn project.

However, the project can put forward some guiding questions to determine, whether an approach towards a tourism co-ordinating body in the NSR could be viable.

Tourism Marketing Perspective

➢ Can the NSR be marketed as **one** destination?

➢ Can customers identify the NSR as **one** destination?

➢ Do tourism marketing organisations have a common perspective on source markets, target groups and the necessities of product development, communication and distribution?

Tourism Economical Perspective

➢ Is there a strong economic exchange (goods, services, workforces, traffic routes, finances) within the NSR compared to the exchanges between NSR regions and other regions?

Tourism Political perspective

➢ Can a joint tourism development effort bring substantial progress to the local and regional development?

➢ Which role can the ERDF (INTERREG IVB North Sea Region programme) and the NSC (North Sea Commission) play in supporting joint tourism concepts and actions?

The key success factor for the implementation, and thus for all subsequent implementation processes, is however the existence of an institution that serves as an initiator and co-ordinator for the implementation of interregional learning processes. Without such an institution, learning processes, but also the aim of a strategic implementation of sustainable and innovative tourism development processes, will not even have a starting point, not to mention a successful result.

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