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STUDY

## Policy Department B: Structural and Cohesion Policies

# THE IMPACT OF TOURISM ON COASTAL AREAS: REGIONAL DEVELOPMENT ASPECTS

REGIONAL DEVELOPMENT

2008

EN





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**Directorate General for Internal Policies of the Union**

**Policy Department B: Structural and Cohesion Policies**

**REGIONAL DEVELOPMENT**

**The Impact of Tourism on Coastal Areas:  
Regional Development Aspects**

**STUDY**

**IP/B/REGI/IC/2006-166-Lot 01-C03-SC01**

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Author(s): CSIL Centre for Industrial Studies  
in partnership with Touring Servizi \*

Responsible Official: Ms Ivana Katsarova  
Policy Department B: Structural and Cohesion Policies  
European Parliament  
B-1047 Brussels  
E-mail: [ipoldepb@europarl.europa.eu](mailto:ipoldepb@europarl.europa.eu)

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\* *CSIL*: Silvia Vignetti (coordinator), Federica Givone, Davide Sartori, Alessandro Valenza. *Touring Servizi*: Matteo Montebelli, Angela Amodio. *Case study authors*: Tomasz Geodecki - *Malopolska School of Public Administration, Cracow University of Economics* (Pomorskie); Stratis Koutsoukos and Catherine Brooks - *ERBEDU, Leeds Business School, Leeds Metropolitan University* (Yorkshire and Humber); Nicolas Gillio, independent expert (Guadeloupe); Professor Mario Vale - *University of Lisbon* (Algarve); Alessandro Valenza (Marche).



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**Directorate General for Internal Policies of the Union**

## **Policy Department B: Structural and Cohesion Policies**

### **REGIONAL DEVELOPMENT**

# **The Impact of Tourism on Coastal Areas: Regional Development Aspects**

## **STUDY**

### **Content:**

The present study examines the role that Structural Funds play in supporting tourism interventions in coastal regions.

Although tourism is not a high priority, and in quantitative terms the proportion of Structural Funds spent on tourism is only a small proportion of the total, the impact in qualitative terms on regional development is substantial, especially in those coastal regions that are highly dependent on the tourism sector.

The findings of the study show that a significant impact is related to aspects of institutional building, especially in the new Member States. Another important impact concerns awareness-raising, especially with regard to the environmental sustainability aspects of tourism projects. It is well recognised by policy-makers that the sustainability of a fast-growing sector such as tourism, particularly mass tourism in coastal regions, is a key challenge for the future.

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## Executive summary

### Background

Within the tourism sector, coastal tourism is by far the most significant in terms of tourist flows and generation of income. Among tourist destinations, coastal areas are most preferred by tourists, and the Mediterranean region is the world's leading tourist destination: according to the World Tourism Organisation estimates it represents one-third of global income by tourism receipts.

Most of the economies of Member States with significant lengths of coastline are highly dependent on the income generated by sea-related activities, such as tourism, fishing, transport etc. However, the use of the sea for such different purposes generates increasing pressure, in particular:

- competition for space leads to conflicts between various activities (fishing, services, agriculture);
- the natural ecosystems that support coastal areas suffer degradation, especially because of the impact of climate change;
- there are large seasonal variations in population and employment.

The increase in coastal tourism flows, especially in the form of mass tourism, is coupled with emerging concerns about potentially negative impacts on regional development from an environmental, economic and social point of view. Structural Funds can play a role in fostering sustainable development principles while designing and implementing coastal tourism interventions.

### Aim

The aim of the present study is to provide a comprehensive qualitative analysis of the impact of Structural Fund expenditure on tourism projects in coastal regions, in order to put forward recommendations and policy-relevant advices for decision-makers. The approach is focused on five main aspects where the impact of Structural Funds can be crucial for the delivery of successful regional development interventions. These are:

- Developing partnerships;
- Providing financial leverage;
- Revitalising the local economy;
- Reducing seasonality;
- Fostering environmental sustainability.

The methodology used comprised a twofold methodological approach:

- provision of a general overview about the coastal tourism sector and funding opportunities, based on the collection and processing of secondary data available from the vast literature on tourism, coastal regions and Structural Funds;
- analysis of primary data collected from fieldwork and case studies. Six target coastal regions have been selected, respecting the following mandatory criteria:
  - representativeness of all the six macro-areas;
  - inclusion in the sample of at least one island region;
  - inclusion in the sample of at least one cross-border region;

- fair balance between “Convergence” and “Competitiveness and Employment” regions.

## **Evidence of the impact of Structural Funds on coastal tourism**

### **A noteworthy source of funding**

Tourism is primarily of regional and national competence, and there are no policies or financial instruments at European level specifically aimed at tourism. Nevertheless, tourism interventions are part of broader European policies which could have a considerable impact on the sector.

The main financial support for tourism derives from the Structural and Cohesion Funds. During the last programming period a large number of tourism interventions received support from these funds, the support varying due to the cross-cutting nature of the sector. Most important coastal tourism destinations in Europe received support through regional operational programmes and national sectoral operational programmes. The interventions included small tourism infrastructure, grant schemes to tourism small and medium enterprises (SMEs), beach renewal, urban regeneration, and culture and artistic heritage support.

### **An impact mainly in terms of institutional building**

The overall impact of Structural Funds on regional development is varied. In qualitative terms it has had a positive impact, especially in terms of institutional building and enhancement of planning capacity. This is especially true for the new Member States, who were less used to participatory and bottom-up approaches in public planning. In more quantitative terms, the impact of Structural Funds on coastal tourism is less clearly identifiable. The main reasons are:

- Tourism is not a priority for Structural Fund interventions, so only a small proportion of financial resources is allocated to this sector;
- Policy priorities of regional development plans only exceptionally focus solely on coastal tourism; rather, they address the whole tourism offer of the region;
- Tourism is rarely a stand-alone priority, as it is usually associated with broader strategies of fostering competitiveness, diversifying productive activities within declining areas, etc.

In terms of typologies of intervention, there is still a predominance of physical and infrastructural investments aimed at increasing the accommodation supply and improving the accessibility of an area, rather than non-physical interventions concerning service provision, territorial marketing, or with the diversification of the tourism offer generally. However, evidence seems to show that in general the regional policies on tourism in the new programming period are moving towards a more qualitative and integrated approach focused on reducing the pressure on the coasts and offering a more developed set of activities and entertainment.

Policies on accessibility and environmental protection, despite not being specifically targeted at tourism, may contribute indirectly but significantly to its development.

### **Fostering partnership in a multi-level governance framework**

The governance framework in the tourism sector is characterized by a multi-level, multi-sectoral dimension. If an integrated approach to design and planning is not put in place, there is a risk of conflicting measures being pursued. This is particularly evident with regard to the environment: the natural assets of a region are sometimes still perceived as a constraint to a policy of

commercial exploitation of the area, rather than a value to be preserved as a fundamental asset for the attractiveness of a place.

Evidence from the case studies highlighted the fact that the impact of Structural Funds on developing the principles of partnership in designing regional development policies is significantly positive and most relevant, although in the new Member States the bottom-up approach and the partnership principle are less integrated than in the old Member States.

The degree of involvement of actors is more visible in the upstream activities of design and planning rather than in the implementation and delivery mechanisms. This usually increases the short-term perspective of the planning exercise and does not help in the dialogue and clear sharing of policy visions, while successes are recorded when the role of actors is more proactive and relevant in all the policy phases.

In terms of typology of actors, local public authorities in coastal areas usually play the most active role in coastal tourism partnerships. Regional and local public authorities, the private sector, and environmental associations are usually involved in partnership. A more innovative approach to coastal tourism would also require the involvement of environmental bodies, representatives of the productive sectors connected with the sea, experts and actors in the cultural sectors, and the scientific community with an interest in marine activities.

### **Still a weak leverage effect on private funds**

National contributions cover on average the largest share of the total project costs in the Objective 2 regions; on the other hand, in Objective 1 regions EU Funds provide a major contribution towards co-financing tourism projects. EU co-financing represents the largest proportion only in the case of infrastructure projects, which, however, usually fall within transport and environment interventions, or within measures for restoring and valorising artistic and cultural heritage.

Participation of the private sector is still not so relevant: attracting private sector funding for tourism projects has been rather difficult for most localities.

The most common attitude of the private sector towards public funding is grant-seeking for private investment needs. In the case of other stakeholders, the promotion of a specific end is the only contribution foreseen in the design of the interventions, although a common effort towards enhancing the attractiveness of a region could support a less fragmented framework of interventions.

Evidence from the case studies showed that in the case of direct support for firms, the selection process of co-financing investment projects was biased towards manufacturing, sometimes at the expense of the service sectors. Furthermore, in the new Member States the participation of private firms has been rather weak, partly because of the weak association level of tourism enterprises.

A more strategic approach would require that efforts be made to encourage entrepreneurs and the private sector to become investors rather than simply beneficiaries of public subsidies. A key challenge in Public-Private Partnership is finding sustainable and effective ways of providing incentives to private investors.

## **The revitalisation of local economy**

It is too early to discuss the impact of Structural Funds on regional growth in coastal areas for the period 2000-2006. In general, the impact on growth depends upon the features of the region examined. Where coastal tourism and regional tourism coincide, the economic impact of Structural Funds is highly effective. As is well recognised, increasing disposable income is a major cause of the boost to coastal tourism demand, and for this reason the positive impact of Structural Funds could have an indirect positive effect on coastal tourism via the demand side rather than supply. Good planning and management also affect the Structural Funds' impact on growth: the more the Structural Funding mechanism is integrated into a region's administrative capacity, the higher is the impact upon regional growth.

The evidence from the case studies also highlighted that interventions in coastal tourism affect employment dynamics positively in terms of job creation in the sector. In the case of regions suffering rural and industrial decline in the hinterland, coastal tourism may attract workers from declining sectors. However, an important issue to be addressed is the nature of the new jobs created by tourism in coastal regions. Tourism development is characterised by a high degree of part-time seasonal employment and overall flexible working conditions. Young people and less skilled workers are often those who benefit from the job opportunities in tourism (as waiters, cooks, barmen, entertainers, promoters, sports instructors). Against this background, Structural Funds are also used to improve the quality of employment in the tourism sector, because local policy-makers are very concerned about the issues of quality of employment.

## **Diversification to reduce seasonality**

The promotion of alternative forms of tourism and the diversification of tourism offerings represent the main challenge for coastal policies. Diversification can contribute to improving the attractiveness of coastal destinations and enabling them to move beyond the traditional 3S ("sun, sea and sand") model. Alternative forms of tourism can help to extend the season, producing multiple benefits, among which are:

- new sources of income, creating more growth and employment;
- the reduction of the environmental, economic, social impact and pressure caused by concentrating tourism into a few months of the year;
- the creation of new activities supporting the preservation and development of the area's heritage.

There are some interesting solutions emerging from the Structural Funds experience:

- an innovative strategy would seek the promotion of an integrated tourism offer, able to link the coastline with the hinterland and different areas;
- historical heritage and cultural tourism is a way to differentiate the tourism offer in coastal towns which have historically performed an industrial function, and to re-shape the identity and distinctiveness of an area, transforming coastal resorts into heritage seaside towns;
- alternative forms of tourism (e.g. "business tourism", with trade fairs and conferences aimed at a different customer base) have been promoted;
- in the regions characterised by a core business traditionally based on "sun, sea and sand", efforts have been made to develop the tourism product into a more sophisticated

offering, including a variety of value-added leisure activities such as sports, health and spas, golf, sailing, tourism for older people, theme parks, meetings, conferences, etc.

### **Sustainable development is a key policy priority**

The Structural Funds have positively contributed to raising environmental awareness and to the diffusion of the objectives of sustainable development in regional planning, setting the sustainable development issue as a general cross-cutting priority.

As nature-based destinations, island and coastal areas are the destinations most exposed to climate-induced environmental changes, which can produce a reshaping of tourism choices and activities.

To address the problem, the World Tourism Organisation (WTO) proposes a balanced approach based on the principles of mitigation (i.e. actions reducing factors that contribute towards climate change and thus alleviating its effects) and adaptation (i.e. taking the necessary steps to cope with the consequences of climate change).

### **Conclusions**

The evidence from the literature review and the case studies analysis highlighted that:

- in the last programming period, coastal tourism interventions received considerable support from the European Regional Development Fund, within the framework of the Regional Operational Programmes;
- reduction of seasonal effects, sustainable development, and product diversification are the future challenges of the coastal tourism sector;
- the clearest impact of Structural Funds on coastal tourism is in terms of institutional and capacity building;
- in the old Member States the partnership principle seems to be an embedded component of both programming and project design, while in the new Member States large-scale involvement of stakeholders has yet to become standard;
- interventions within the Cohesion Policy framework allowed concerns for a need for an integrated approach to coastal management and planning to be raised, especially in terms of environmental protection (coastal erosion and biodiversity);
- national or regional public funds make the major contribution to co-financed Structural Funds interventions, attracting private investors being difficult in most regions (especially rural areas);
- small islands and Outermost regions are the areas where the impact of Structural Funds on the revitalisation of the local economy is the most significant;
- the differentiation of the services offered is the main strategy adopted to reduce tourism seasonality;
- natural assets of an area are no longer seen as a constraint but as adding value to the tourism offer.

## Recommendations

### European Commission

For the new programming period, EU policies should be aimed at:

- integrating coastal tourism interventions co-financed by Structural Funds within broader frameworks, in particular the Maritime Policy, the Integrated Coastal Zone Management strategy, the Trans-European Network for Transport, and the Natura 2000 Environmental Policy;
- developing an integrated approach for the comprehensive management of interventions falling within different policy fields but aimed at coastal areas;
- promoting evaluation and monitoring activities to check the application of the sustainable development principle in coastal tourism interventions.

### Member States and coastal regions

Decision-makers at national and regional level should:

- promote a shift from physical infrastructural investments in “place-making” activities to the diversification of products and services through “place-shaping” activities. This can be achieved by:
  - complementing the traditional “sun, sea and sand” product with leisure activities related to the sea (e.g. fishing or diving);
  - creating themed routes and trails aimed at discovering the regional heritage of the hinterland (e.g. gastronomy);
  - converting towns and settlements that have historically performed an industrial function into tourist destinations through the promotion of their architectural and cultural distinctiveness;
  - considering the opportunity of specialisation of services and accommodation to attract business travellers;
- invest in project visibility, profile and performance, to shift the attitude of the private sector from being beneficiaries of public funds to being long-term investors (public-private partnership);
- adopt a global perspective towards the tourism market, to face the growing competition from low-cost non-European destinations;
- integrate the development of tourism infrastructures and facilities with environmental protection measures;
- design training programmes to create a pool of skilled workers, to deal with the increased complexity and variety of the tourism sector.

## Acronyms

<b>CCT</b>	Cross-cutting theme
<b>C&amp;E</b>	Competitiveness and Employment Objective
<b>CIP</b>	Competitiveness and Innovation Framework Programme
<b>CLC</b>	Corine Land Cover Database
<b>CSF</b>	Community Support Framework
<b>EAGGF</b>	European Agricultural Guidance and Guarantee Fund
<b>EAFRD</b>	European Agricultural Fund for Rural Development
<b>EEA</b>	European Environment Agency
<b>EFF</b>	European Fisheries Fund
<b>EMP</b>	European Maritime Policy
<b>ESA</b>	European System of Accounts
<b>ERDF</b>	European Regional Development Fund
<b>ESF</b>	European Social Fund
<b>FIFG</b>	Financial Instrument for Fisheries Guidance
<b>ICT</b>	Information and Communication Technology
<b>ICZM</b>	Integrated Coastal Zone Management
<b>IPCC</b>	Intergovernmental Panel on Climate Change
<b>LFS</b>	Labour Force Survey
<b>NACE H</b>	Nomenclature statistique des activités économiques dans la Communauté européenne, Hotels & Restaurants
<b>NGO</b>	Non Governmental Organisation
<b>OP</b>	Operational Programme
<b>PMC</b>	Programme Monitoring Committee
<b>PPP</b>	Public-Private Partnership
<b>R&amp;D</b>	Research and Development
<b>ROP</b>	Regional Operational Programme
<b>SF</b>	Structural Fund
<b>SFSG</b>	Structural Funds Strategy Group
<b>SME</b>	Small and Medium Enterprise
<b>SPD</b>	Single Programming Document
<b>SWOT</b>	Strengths, Weaknesses, Opportunities, Threats
<b>WTO</b>	World Tourism Organisation
<b>WEFO</b>	Welsh European Funding Office
<b>WTTC</b>	World Travel & Tourism Council



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# 1. Introduction

## 1.1 Background

The tourism industry is a cross-cutting sector affecting a wide variety of services and fields of activities, in particular transport, construction, retail and other sectors providing travel and leisure-related services.<sup>1</sup>

As widely acknowledged and supported by statistics, it is the largest service industry in the European Union, accounting for more than 4% of the Community's GDP and employing about 4% of the total labour force, when only hotels and travel agencies (the core businesses) are considered. Should the links to other sectors, such as transport, culture, recreational activities etc., be taken into account, these estimates almost triple.<sup>2</sup> Given this impact on the European economy, tourism is sometimes considered as a promising sector in terms of contribution to the achievement of the Lisbon Strategy goals of growth and employment.

Within the tourism sector, coastal tourism is by far the most significant in terms of visitor numbers and income generated. Among tourist destinations, coastal areas are most favoured by tourists, and the Mediterranean region is the world's leading tourist destination. According to the World Tourism Organisation (WTO), one-third of global income from tourism is generated in the Mediterranean region.

Coastal regions comprise a broad set of socio-economic contexts with different regional development needs and patterns (see Table 1).

Most of the economies of Member States with significant lengths of coastline are highly dependent on the incomes generated by sea-related activities, such as tourism, fishing, transport etc.

The use of the sea for such different purposes generates increasing pressure, in particular:

- the scarcity of space leads to conflicts between various activities (fishing, services, agriculture);
- the natural ecosystems that support coastal areas suffer degradation, especially because of the impacts of climate change;
- there are large seasonal variations in population and employment.

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<sup>1</sup> According to the last DG Enterprise Report on the "European tourism industry in the enlarged Community", the main categories of enterprises identified as belonging to the "tourism sector" are: a) hotels and other accommodation (NACE division H 551-552), b) restaurants, bars, canteens and catering (NACE H 553-555), c) travel agencies and tour operators (NACE I 633).

<sup>2</sup> EC, *A renewed EU Tourism Policy: Towards a stronger Partnership for European Tourism*. Brussels, 17.03.2006.

**Table 1. Selected socio-economic indicators for coastal regions by macro-area**

Macro-area (*)	N. of regions	Population density (inh./km <sup>2</sup> ), 2004 (average at NUTS2 level)	GDP/head in €2004 in PPS (average at NUTS2 level)	Unemployment rate (%), 2005 (average at NUTS2 level)	People employed per sector (%)		
					Agriculture	Industry	Services
<b>Total coastal</b>	<b>128**</b>	<b>273.75</b>	<b>20,635</b>	<b>8,62</b>	<b>6.31</b>	<b>24.64</b>	<b>69.06</b>
North Sea	25	341.98	24,709	5.86	3.07	23.75	73.17
Atlantic Ocean	35	250.86	21,832	6.48	4.85	25.46	69.70
Baltic Sea	21	63.67	20,210	10.48	6.24	24.97	68.79
Mediterranean Sea	40	400.32	18,988	9.87	9.33	25.41	65.26
Black Sea	3	72.83	7,820	9.42	33.47	27.45	39.08
Outermost regions	7	223.7	15,529	17.11	5.24	17.99	76.77
<b>Total non-coastal</b>	<b>137</b>	<b>466.57</b>	<b>20,904</b>	<b>9.54</b>	<b>6.58</b>	<b>29.61</b>	<b>63.79</b>

(\*) All the averages per coastal/non-coastal region are calculated by considering the single regions as unit measures.

(\*\*) Denmark, Vastverige (SE) and Schleswig-Holstein (DE) have been included twice, both in the Baltic Sea and North Sea macro-areas, Highlands and Islands are included twice, both in the Atlantic Ocean and North Sea macro-areas, while Andalucia has been included both in the Atlantic Ocean and Mediterranean macro-areas.

**Source: Authors' processing of the Fourth Cohesion Report data (DG Regio)**

The increase in coastal tourism flows, especially in the form of mass tourism, is coupled with emerging concerns about potentially negative impacts on regional development from an environmental, economic and social point of view. Structural Funds can play a role in fostering sustainable development principles<sup>3</sup> in the design and implementation of coastal tourism interventions.

## 1.2. Aim

The aim of the present study is to provide a comprehensive qualitative analysis of the impact of Structural Fund (SF) expenditure on tourism projects in coastal regions. The objective of the study is to set out recommendations and policy-relevant advice for decision-makers concerning support for the coastal tourism sector. It illustrates some practice in the use of SFs for implementing such measures, discussing a range of strategies that decision-makers in coastal regions could implement to respond effectively to such challenges.

The quantitative impact of tourism on regional development is generally estimated with the use of input-output models or analysis of the multiplier effects. These studies relate to the direct, indirect and induced effects of tourist flows on regional output, income, employment, value-added and related economic indicators. The nature of such impacts varies according to the tourist destinations and tourism models.

Such an analysis is neither useful for the aim, nor within the scope, of the present study. The approach followed here is rather to point out the overall governance and management dynamics

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<sup>3</sup> Sustainable development means economic growth while preserving the available natural and human resources. Thus, it "implies a balanced relationship among human beings, economic development and environment" and "it means to integrate the economic, social and environmental dimensions at the same level of consideration". (EU-Committee of the Regions. *Sustainable Tourism as a Factor of Cohesion Among European Regions*. Luxembourg, 2006).

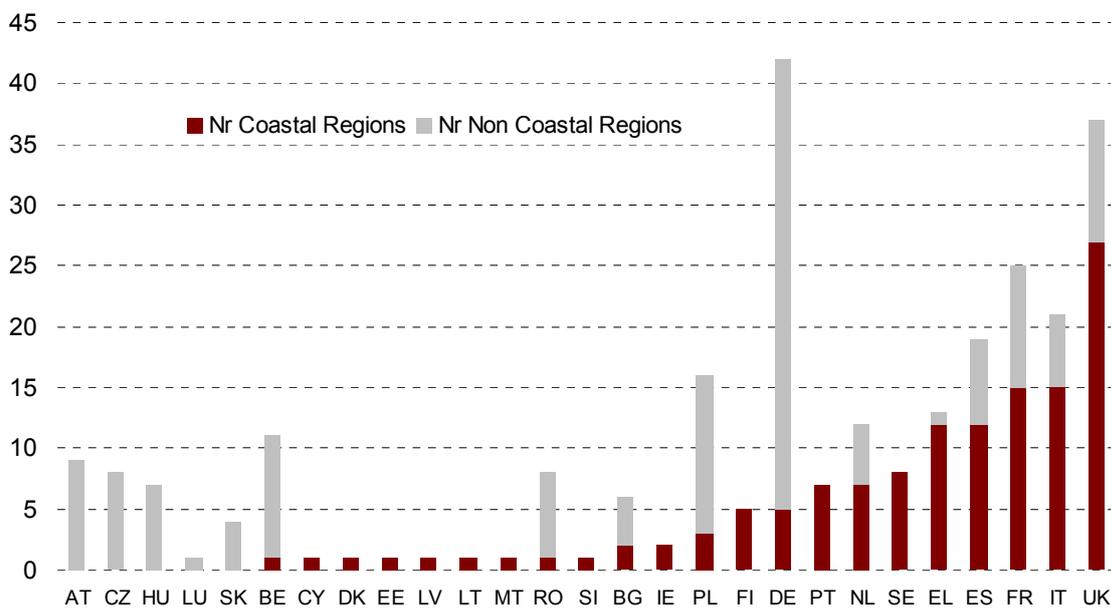
of some common practices, both good and bad examples, in the use of SFs for supporting tourism in coastal regions. In particular the present study discusses how SFs have:

- **fostered partnership:** it discusses the nature of the involvement of the partners and local actors in the programming and implementation phases of SF programmes;
- **stimulated national investments in financial terms:** it illustrates the capacity of SFs to stimulate national/regional financial investments in the coastal tourism sector;
- **participated in the revitalisation of the local economy:** it presents the relationship between the general economic situation in coastal areas and the role of interventions in tourism supported by SFs;
- **encouraged different types of tourism:** it analyses the capacity of SFs to encourage new forms of tourism in order to reduce seasonal effects;
- **taken into account environmental sustainability:** it highlights the capacity of SFs to promote sustainable coastal tourism interventions, taking into account the effects of climate change (e.g. diminishing water supplies, hotter temperatures) and other environmental challenges.

### 1.3 Scope

Different types of tourist destinations exist and different categorisation have been proposed, on the basis of topographical features,<sup>4</sup> quantitative indicators<sup>5</sup> or others.

**Chart 1. Number of coastal and non-coastal NUTS2 regions per country**



Source: Authors

<sup>4</sup> For example, according to Eurostat 2002, “seaside tourism” is defined by a strong concentration of relatively small-sized establishments, an average length of stay of three days, domestic arrivals and wide spatial competition within the sector (with other seaside areas) and between sectors (with other industrial activities).

<sup>5</sup> Indicator 1: *Tourism intensity*, defined by the number of tourism bed places per inhabitant; Indicator 2: *Tourism density*, defined by the number of tourism bed places per sq km; Indicator 3: *Land take by tourism*, defined by the number of tourism establishments every 100 km. Source: Committee of the Regions, 2006.

While different definitions for coastal areas exist (see Box 1), for the scope of the present study the relevant unit of analysis is the EU NUTS2 regions touched by the sea, even for a small part of their territory (see Chart 1).

#### **Box 1. Different definitions for coastal areas<sup>6</sup>**

In this report, coastlines are determined from the Corine Land Cover database (CLC). The terrestrial portion of the coastal zone is defined by an area extending 10 km landwards from the coastline. Where relevant, assessment of the basic coastal zone is enhanced by comparisons between the immediate coastal strip (up to 1 km), the coastal hinterland (coastal zone between 1- and 10-km line) and the non-coastal national territory, designated inland. The marine part of the coastal zone is defined as a zone extending 10 km offshore (i.e. as in Natura2000 coverage analysis) or a variable zone of sea shelf depending on the issue analysed (e.g. navigation routes, territorial waters, fisheries, coastal dynamics). The generic term used throughout the report is coastal zone, but coastal area, coast, coastal space and coastal systems are used synonymously to better accommodate the particular context.

Depending on the coastline data and definition of the coastal zone used, the estimates of European terrestrial coastal zone can vary between 4% and 13% of the land mass. In line with the above definition and based on CLC data, there is almost 185,000 km of coastline and 560,000 sq km of coastal zones (terrestrial part) in the 24 European coastal countries available for this measurement (20 coastal EU Member States plus Norway, Iceland, Bulgaria and Romania). This area corresponds to 13% of the total land mass of these countries, or 11%, if only 20 coastal EU countries are included.

**Source: *The Changing Faces of Europe's Coastal Areas*, EEA Report No 6/2006.**

European coastal regions extend over 89,000 km, and include many urban centres with a population of more than 50,000 inhabitants as well as capital cities like Athens, Copenhagen, Lisbon and Stockholm. In terms of tourism destinations coastal areas include:<sup>7</sup>

- 1) urban and industrial areas, with high concentration of population;
- 2) intensive tourism areas, characterised by urban centres and great seasonal population variations;
- 3) natural, rural and fishing areas, associated with scattered settlements.

Coastal regions are unevenly distributed among the Member States. There are countries in Europe which are completely surrounded by the sea and whose economy mainly depends on sea-related activities, i.e. small islands; other countries, on the contrary, do not have any access to the sea (Czech Republic or Austria), or only have a limited length of coastline (Slovenia).

In terms of geographical features, EU coastal regions extend from the Baltic Sea to the Indian Ocean, and from the Black Sea to the Caribbean. In this diversified set of environments, six macro-areas can be identified (see Table 2), each of them is characterised by a specific model of coastal tourism. They are:

- Atlantic area, sports and sea-related activities;
- Baltic Sea area, natural heritage as a key asset;
- Black Sea area, new mass tourism destination and health tourism;
- Mediterranean area, the 3S model;
- North Sea area, cultural and traditional heritage;
- Outermost area, exotic landscapes in Europe.

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<sup>6</sup> According to the European Environment Agency (EEA), coastal areas are:

"The part of the land affected by its proximity to the sea, and that part of the sea affected by its proximity to the land as the extent to which man's land-based activities have a measurable influence on water chemistry and marine ecology."

[http://glossary.eea.europa.eu/EEAGlossary/C/coastal\\_area](http://glossary.eea.europa.eu/EEAGlossary/C/coastal_area)

<sup>7</sup> Noronha, L, *et al. Managing Coastal Tourism* (2003)

**Table 2. NUTS 2 Coastal regions per macro-area(\*)**

<b>Atlantic Regions</b>	<b>Spain:</b> Galicia, Principado de Asturias, Cantabria, País Vasco, Andalucía; <b>France</b> includes: Picardie, Haute-Normandie, Basse-Normandie, Nord - Pas-de-Calais, Pays de la Loire, Bretagne, Poitou-Charentes, Aquitaine; <b>Ireland;</b> Border, Midland and Western, Southern and Eastern; <b>Portugal:</b> Norte, Algarve, Centro (PT), Lisboa, Alentejo; <b>United Kingdom:</b> Cumbria, Cheshire, Lancashire, Merseyside, Surrey, East and West Sussex, Hampshire and Isle of Wight, Gloucestershire, Dorset and Somerset, Devon, Cornwall and Isles of Scilly, West Wales and The Valleys, Western Scotland, Highlands and Islands, Herefordshire, Worcestershire and Warwickshire, Northern Ireland.
<b>Baltic sea Regions</b>	<b>Denmark;</b> <b>Estonia;</b> <b>Latvia;</b> <b>Lithuania;</b> <b>Germany:</b> Mecklenburg-Vorpommern, Schleswig-Holstein; <b>Poland:</b> Zachodniopomorskie, Warmińsko-Mazurskie, Pomorskie; <b>Finland:</b> Itä-Suomi, Etelä-Suomi, Länsi-Suomi, Pohjois-Suomi, Åland; <b>Sweden:</b> Stockholm, Östra Mellansverige, Sydsverige, Norra Mellansverige, Mellersta Norrland, Övre Norrland, Småland med öarna, Västsverige;
<b>Black sea Regions</b>	<b>Bulgaria:</b> Severoiztochen and Yugoiztochen; <b>Romania:</b> Sud-Est.
<b>Mediterranean Regions</b>	<b>Greece:</b> Anatoliki Macedonia-Thraki, Kentriki Macedonia, Thessalia, Ipeiros, Ionia Nisia, Dytiki Elláda, Sterea Elláda, Peloponnisos, Attiki, Voreio Aigaio, Notio Aigaio, Kriti; <b>Spain:</b> Cataluña, Comunidad Valenciana, Illes Balears, Andalucía, Región de Murcia, Ciudad Autónoma de Ceuta, Ciudad Autónoma de Melilla; <b>France:</b> Languedoc-Roussillon, Provence-Alpes-Côte d'Azur, Corse; <b>Italy:</b> Liguria, Veneto, Friuli-Venezia Giulia, Emilia-Romagna, Toscana, Marche, Lazio, Abruzzo, Molise, Campania, Puglia, Basilicata, Calabria, Sicilia, Sardegna; <b>Cyprus,</b> <b>Malta,</b> <b>Slovenia.</b>
<b>North sea Regions</b>	<b>Denmark;</b> <b>Belgium:</b> prov. West vlandereen; <b>Germany:</b> Bremen, Lüneburg, Weser-Ems, Schleswig-Holstein; <b>Netherlands:</b> Groningen, Friesland, Flevoland, Noord-Holland, Zuid-Holland, Zeeland, Noord-Brabant; <b>Sweden:</b> Västsverige; <b>United Kingdom:</b> Tees Valley and Durham, Northumberland, Tyne and Wear, Lincolnshire, North Yorkshire, East Anglia, Essex, Kent, North Eastern Scotland, Eastern Scotland, East Riding and North Lincolnshire, Highlands and Islands.
<b>Outermost Regions</b>	<b>Spain:</b> Canarias; <b>France:</b> Guadeloupe, Martinique, Guyane and Réunion; <b>Portugal:</b> Região Autónoma dos Açores and Região Autónoma da Madeira.

(\*) Denmark, Västsverige (SE), and Schleswig-Holstein (DE) have been included twice, both in the Baltic Sea and North Sea macro-areas, Highlands and Islands are included both in the North Sea and Atlantic Ocean macro-areas, while Andalucía has been included both in the Atlantic Ocean and Mediterranean macro-areas

**Source: Authors**

Coastal regions show different approaches to coastal tourism from a regional development point of view. In particular, the SF expenditure in these regions offers a good opportunity for a planning exercise in terms of enhancing the attractiveness of a region.

## 1.4 Methodology

The study is structured on a twofold methodological approach:

- 1) a general overview about the coastal tourism sector and funding opportunities provides an overall picture. This review is based on the collection and processing of secondary data available from the vast literature on tourism, coastal regions and SFS. Both qualitative and quantitative analyses have been carried out;
- 2) the overall picture has been enriched with the analysis of primary data collected from fieldwork and case studies. Six target coastal regions have been selected, respecting the following mandatory criteria:
  - representativeness of all the six macro-areas;
  - inclusion in the sample of at least one island region;
  - inclusion in the sample of at least one cross-border region;
  - fair balance between “Convergence” and “Competitiveness and Employment” (C&E) regions.

The combination of the above criteria produced the following selection of regions (Table 3): Algarve (Portugal), Guadeloupe (France, Outermost region), Marche (Italy), Pomorskie (Poland), Sud-Est region (Romania) and Yorkshire and The Humber<sup>8</sup> (United Kingdom).

The methodology used for the case study analysis comprised a common template for data collection aimed at ensuring comparability by providing a standard grid for data collection and processing. A critical cross-cutting analysis of the case studies was carried out in the light of the five thematic areas identified as crucial.

The main tools used for data gathering in the case studies were:

- interviews with:
  - public sector managers of interventions in the field of tourism co-financed by SF;
  - representatives of private sector tourism;
  - representatives of environmental associations and other relevant actors;
- a desk analysis of relevant programming documents (Single Programming Document (SPD), Regional/National/Sectoral Operational Programmes, Regional/National Sectoral planning) and management documents (Annual Implementation Reports, Evaluation - Mid-term Updates, Terms of Reference for the selection of tourism projects).

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<sup>8</sup> In the case of United Kingdom, a NUTS1 region (instead of NUTS2) has been selected as this is the institutional level in charge of the management of SF Operational Programmes.

**Table 3. Case studies: selected regions**

Macro-area	Region	Tourism-related features
Atlantic	Algarve <i>Portugal</i>  <i>Objective 1 (2000-2006)/ Convergence region (2007-2013)</i>	Thanks to favourable Mediterranean climate conditions, the Algarve region seems to be one of the most famous bathing tourism destinations along the European Atlantic coast. Moreover, next to the sea is a mountainous area, giving holidaymakers the opportunity of a richer experience in a diverse landscape. The Algarvian tourism product is particularly diversified. Well-equipped beaches, golfing resorts and modern conference and meeting centres combine with the possibility of practising different sea and mountain sports and of experiencing local cultural traditions. The accommodation offer is characterised by large hotels. Most of the night stays recorded in Algarvian accommodation establishments are attributed to international visitors, but the number of national visitors doubled in the decade under consideration.
Baltic	Pomorskie <i>Poland</i>  <i>Objective 1 (2000-2006)/ Convergence Region (2007-2013)</i>	If Pomorskie's coastal belt is characterised by a large number of lakes, going inland tourists can find morainal hills covered by woodland. All this, combined with a large number of landscape parks and nature reserves, especially the Slowinski National Park (included in the UNESCO list of World Biosphere Reserves), defines the local tourism product. Also, the topographical characteristics of the region have helped in developing fishing, sports and health tourism, particularly near the seaside, because of the good climatic conditions. In the "Tri-city" complex - especially Gdansk - social and economic vitality have attracted a large proportion of international visitors.
Black Sea	Sud-Est <i>Romania</i>  <i>ISPA (2000-2006)/ Convergence region (2007-2013)</i>	The Romanian tourism offer is centred on bathing. The morphological characteristics of the beaches and the warm climate are the main elements in coastal promotion. Most accommodation is in medium to large-sized hotels. Conversely, the average size of other collective establishments is lower and their number has been reducing in recent years. Besides bathing tourism, cultural tourism has been developed based on Greek remains of the 7 <sup>th</sup> century BC. Health tourism is an increasing target market, thanks to the good reputation of the Black Sea for curing joint ailments and the development of spas specialising in mud baths and internationally famous treatments.
Mediterranean	Marche <i>Italy</i>  <i>Objective 2 (2000-2006)/ Convergence region (2007-2013)</i>	The regional offer is based on seaside tourism, homogeneously developed in all the coastal resorts. The coasts are mostly flat and characterised by the typical sun and sea offer. Marche's coastal area is broken near Ancona by the Conero mountain. It is one of the few high points along the coast and it provides opportunities for environmental tourism, trekking and mountain biking. In the last years the most successful tourism offer has been connected to food and wine and to the small historical villages inland. The strong interest in real estate investments by international tourists (especially English) is the result of this trend. Most of the holidaymakers come from Italy, but the number of those coming from abroad is increasing, especially from Great Britain, Russia, Czech Republic and Slovenia.
North Sea	Yorkshire and the Humber <i>UK</i>  <i>Objective 2 (2000-2006)/ Competitiveness and employment region (2007-2013)</i>	The Yorkshire and Humber coastal tourism offer consists mainly of small hotels and guesthouses. The most frequent tourists are domestic, from within the UK. Parts of the inland area are urbanised (York, Leeds and Sheffield are productive centres as well as drawing tourists), and the coastline offers a range of attractions for short breaks all the year round. On the other hand, international tourists can find an interesting area for their "long" summer vacation: sandy beaches, spectacular sea cliffs and landscapes, heritage, culture and sports are the main elements of the tourism offer. International tourism is also influenced by the educational market for studying the English language.
Outermost	Guadeloupe <i>France</i>  <i>Objective 1 (2000-2006)/ convergence region (2007-2013)</i>	Tourists going to Guadeloupe mainly come from France and prefer staying in medium to large-sized hotels. Even if the number of facilities decreased slightly between 1995 and 2005, the availability of bed places noticeably increased. Products offered are consistent with the cultural and geographical characteristics of this area. As in other Caribbean countries, because of the favourable climatic conditions, the predominant tourism attraction is the sea and the opportunity for bathing. A lot of other complementary experiences are linked to this kind of activity, particularly sport activities: diving, surfing, windsurfing, kayaking, fishing, cetacean sightseeing.

Source: Authors

## **1.5 Structure of the study**

The present study starts with a general overview on the trends in European coastal tourism, highlighting its origins, evolution and main features according to a geographical typology.

The main body of the study illustrates the impact of SFS on European coastal tourism. Firstly, it discusses how the SFS may, directly or indirectly, support tourism in coastal regions, assessing what has been financed during the previous programming period, and what guidelines and strategies have been set for the 2007-2013 period. Secondly, the impact is investigated alongside the five key issues presented above: actors and partnership, financial resources, revitalisation of local economies, reduction of seasonal effects, and contribution to regional development. Within these contexts, evidence has been drawn from the available literature and primary case studies.

The last section is intended to provide policy-makers with a set of recommendations and guidelines for future coastal tourism policies within the framework of the Structural Funds.

## 2. Trends in European coastal tourism

### Key findings

- **Mediterranean regions** still play a major role in tourism, primarily as bathing destinations.
- In the **Atlantic and Baltic regions**, the tourism offer combines sea-related activities with the natural and cultural heritage of the hinterland.
- Although mass tourism development in the **Black Sea** coastal regions has relatively recent origins, as compared to other EU destinations, the figures already show good results.
- The preservation of traditions and authenticity of local populations is a main concern in the **Outermost regions**.
- European coastal tourism is facing increased competition and the evolution of tourists' needs: the overall effect is a demand for **higher quality at the lowest possible price**.
- There is increasing concern for the **preservation of the natural and cultural heritage** of coastal regions.

### 2.1 Overview

When talking about **coastal tourism**, a wide variety of different tourism models is included (see Box 1). Tourism is one of the most meaningful dynamics in the economic and cultural development of European countries. Its evolution is evidently connected to historical events occurring through the centuries, and its impacts are the result of the social, environmental and cultural changes it determines. The long European coastal area has attracted more and more holidaymakers since the 18<sup>th</sup> century and it is now one of the most important tourist resources.

**The coastal tourism sector in Europe is undergoing profound changes, due to increased competition and evolving tourists' tastes. The overall effect is a demand for higher quality at the lowest possible price.** The popular '3S' (sun, sea and sand) model is declining, since nowadays tourists expect more than some decades ago. They demand a wide variety of associated leisure activities and experiences, including sports, cuisine, culture and natural attractions.

At the same time, tourism destinations' **resident communities are increasingly concerned to preserve their natural, economic and social assets** from negative impacts which may arise from the development of facilities for tourism purposes.

**Box 2. Main features of European regional tourism according to Eurostat**

<i>Seaside tourism</i>	<ul style="list-style-type: none"> <li>• Strong concentration of relatively small-sized establishments</li> <li>• Predominantly domestic tourism</li> <li>• Average length of stay of 3 days</li> <li>• Existence of competition within the sector and with other sectors</li> <li>• Wide spatial planning</li> </ul>
<i>Urban tourism</i>	<ul style="list-style-type: none"> <li>• Business tourism, with a wide range of attractions</li> <li>• Large-sized hotels spread around the major European cities</li> <li>• Predominantly nights spent in hotels</li> <li>• Low level of domestic tourism, with a few exceptions</li> <li>• The lowest average in terms of length of stay</li> </ul>
<i>Island tourism</i>	<ul style="list-style-type: none"> <li>• High concentration of large establishments (comparable in size to those of urban tourism)</li> <li>• Predominantly non-resident tourism (foreign or national)</li> <li>• High length of stay (the highest for foreign tourists, within the average for national tourists)</li> </ul>
<i>Rural tourism</i>	<ul style="list-style-type: none"> <li>• Nature or rural locations are the main attraction</li> <li>• Length of stay within national average</li> <li>• Predominantly domestic tourism, notably visitors from the region</li> </ul>
<i>Mountain tourism</i>	<ul style="list-style-type: none"> <li>• Highly seasonal</li> <li>• Majority of overnight stays during winter</li> <li>• In general, low hotel bed places capacity; a higher capacity in mass destinations</li> <li>• In general, low length of stay; longer stays in mass destinations</li> <li>• Predominantly domestic tourism, with the exception of the Alps</li> </ul>

Source: EU-Committee of the Regions, 2006

## 2.2 Origins and evolution

**The origins of coastal tourism in Europe can be traced to the 18<sup>th</sup> century in Great Britain**, when the English aristocracy started to consider the sea not just as a natural resource but as a destination for spending their free time (see Box 3). The development of medical dictates about the healthy nature of cold waters, the socio-economic effects of urbanisation during the Industrial Revolution, and the presence of a large and wealthy upper class were the determining conditions for the birth of coastal tourism.

Due to the same medical dictates determining the success of English coasts, the practice of spending the holidays beside the sea was exported to the continent. Until the first half of the 19<sup>th</sup> century the most important and famous bathing centres were sited along the North Sea, Baltic and Atlantic coastlines, with tourists looking for cold waters and urbanised areas.

**Box 3. The origins of coastal tourism**

The town of Scarborough on the North Sea coast, famous since 1627 for the curative properties of its spring water, became the first seaside resort in the history of European tourism. In the late 18<sup>th</sup> and 19<sup>th</sup> centuries Brighton was one of the most important seaside resorts, patronised by royalty. The success of these and other resorts was the result of the medical dictates which spread the idea that bathing in cold seawater was healthy. However, in this period, the beach was associated with walking and conversational activities rather than for exposure to the sun, as this was believed to be dangerous.

From the 1840s the introduction of the railways allowed more and more people (also coming from the lower classes) to have the opportunity of travelling to different parts of England and spending their holidays in new seaside destinations, such as in Essex, Kent and Devon. The culmination of this process, between 1880 and 1910, saw the construction of the first bathing centres, endowed with infrastructures and local operators able to organise holidaymakers' free time. Blackpool, on the north-west coast of England, became the most famous working-class seaside resort.

**Source: Authors**

Socio-economic developments during the 20<sup>th</sup> century, the re-evaluation of the beneficial effects of sunshine, and the development of cheap overseas travel determined the relative decline of the elite North-European locations and the **rise of the Mediterranean regions** as mass tourism destinations. If after the 2<sup>nd</sup> World War all European destinations were characterised by an increasing success, those best representing this trend were the Italian, Spanish and Greek coastline cities and beaches, which still present the most famous bathing establishments and whose resorts have been developing the typical urban tourism model (see Box 4).

**Box 4. The evolution and spread of coastal tourism: from Northern Europe to the Mediterranean**

Until the first half of the 19<sup>th</sup> century most bathing centres were sited along the North Sea, Baltic and Atlantic coastlines because tourists went to the sea in summer but they looked for cold waters and urbanised areas, in accordance with medical dictates.

The French Atlantic coastline developed bathing tourism at the beginning of the 19<sup>th</sup> century, and one of the first bathing cities was Dieppe. Between 1830 and 1850 the region of Normandy was especially characterised by the growth of new seaside centres, which were characterised not only by aristocratic visitors but by the presence of artists.

The only Spanish tourist region was located between San Sebastian and Santander, but economic backwardness and the distance from Madrid did not allow these destinations to achieve great success.

The first Mediterranean seaside destination to be visited by a highly cosmopolitan clientele was the French Côte d'Azur, especially the city of Sète, which introduced this area to the international tourist circuit. Thus, Mediterranean regions appeared for the first time upon the European tourism scene and, following the socio-economic changes occurring in Europe in the 20<sup>th</sup> century, they soon became the most successful destinations, contributing to the birth of middle-class tourism.

**Source: Authors**

## 2.3 Present offer and demand in Europe

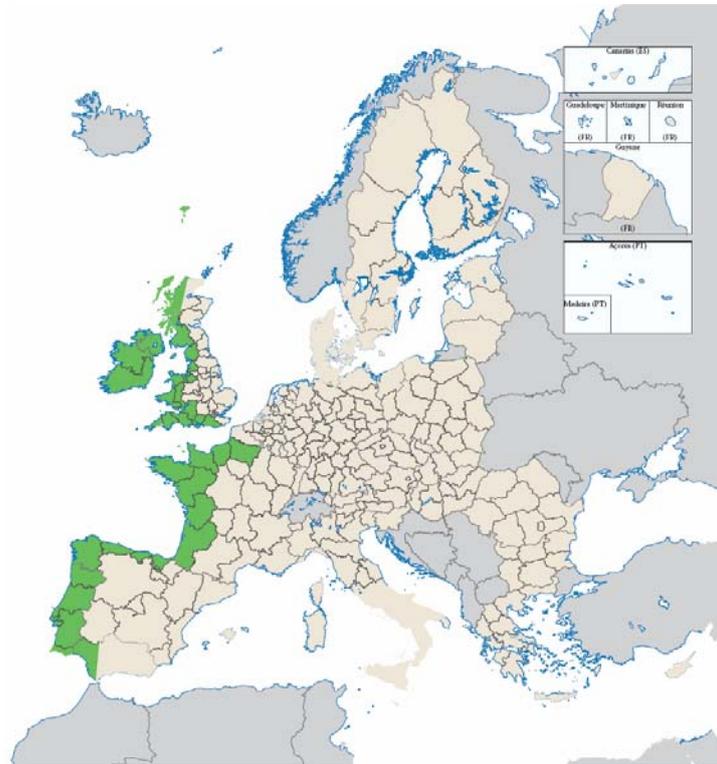
Tourism in European coastal regions has shown a strong growth in the last decade. In 2005 hotels in European coastal regions offered more than 6.7m bed places. Excluding the Black Sea regions, where data for previous years are not available, this number falls to about 6.5m, +10% if compared to 2000, and +36% if compared to 1995. More than 55% of bed places in 2005 were located in **Mediterranean regions**, which **confirms their role as primary bathing destinations**. This trend shows the development of European coastal areas as a result of developing bathing destinations.

The Mediterranean regions have been forced to reinvent their local offer to face the competition of newer, less crowded and cheaper tourism coastal destinations in Europe. However, the urban tourism model they had developed for most of the last century has been considered as key to the success of European destinations deciding to develop their coastal heritage. Seaside resorts in the Bulgarian regions of Severoiztochen and Yugoiztochen and in the Romanian region of Sud-Est seem to reflect those of the Spanish, French and Italian coasts.

The opportunity to copy the Mediterranean tourism model is obviously connected to local climate conditions, which should provide opportunities for summer bathing. For this reason, Spanish and Portuguese coastal destinations seem to be the most important bathing centres within the Atlantic regions. To some extent, favourable circumstances in the southern part of the Baltic region also allow German and Polish coastlines to offer a similar “product”: sandy beaches, seaside resorts and entertainment. Although some other Baltic **countries**, such as Denmark, Estonia, Lithuania, Finland and Sweden, are **characterised by colder temperatures** and a short beach season, along their coastline the sea is equally appreciated for its landscape value and as a natural resource for practising different sports. Similarly, what characterises the tourism offer of the UK’s coastal regions today is the **combination of the sea and the natural and cultural heritage of the hinterland**.

## Atlantic regions: sports and sea-related activities

Map 1. Atlantic Regions



Source: Authors

Historical beaches and seaside resorts characterise local tourism trends along Atlantic coastal regions. That is why bathing tourism, enriched by natural and cultural heritage, seem to be the preferred activity, although in the northern areas the less favourable climate conditions have led to the development of sports and natural or cultural heritage tourism.

The United Kingdom counts amongst its tourist resources the sandy beaches of the Lancashire coast, the surfing beaches of Devon and Cornwall, the Jurassic Coast World Heritage Site of Dorset and East Devon, known for its geological value, and the Pembrokeshire Coast National Park. Much of the coastline is owned and managed by National Trust, including some of the best British beaches. British coastal regions bordering the Atlantic are equally noted for a tradition of sailing.<sup>9</sup>

The Spanish Atlantic littoral, full of historical beaches, combines waterside with mountain activities and attracts tourists to explore the natural landscapes and cultural heritage. The climate in the northern French coastal region is mild and temperate, not so different from the Belgian and the English ones: for example, thanks to a privileged geographical situation, Poitou Charentes is noted for its long hours of sunlight, and La Rochelle is one of the most visited maritime towns in the whole of France. Tourism activities include sport (golf, cycling, horse-riding, angling), gastronomy, and natural and cultural heritage.

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<sup>9</sup> Southampton, the Isle of Wight, Brighton, Dover, Eastbourne, Devon, Cornwall and the Channel Islands (England), the Gower Peninsula and Pembrokeshire (Wales), and the Firth of Clyde (Scotland) are among the most popular places to sail along Britain's Atlantic coastline; Cowes on the Isle of Wight boasts the longest-running sea regatta in the world. The best known surfing beaches are in Devon and Cornwall.

Portugal's coastal tourism is characterised by two main themes: sand and beaches. The Algarve, in the south, is the most popular coastal destination in the country. In addition to this "traditional" tourism offer, golf is a growing market segment, and it is considered a very important element of diversifying the offer to tourists in summer.

Table 4 shows the main accommodation capacity indicators in the Atlantic and North Sea regions.

**Tab. 4 – Capacity of "hotels and similar establishments" in Atlantic and North Sea regions<sup>10</sup> - 1995, 2000, 2005 (ordered by bed places in 2005)**

	1995		2000		2005		Var. % Bed Places 05/95	Var. % Bed Places 05/00	Hotel Bed Places. '05/All Bed Places '05 (%)
	Establishments	Bed Places	Establishments	Bed Places	Establishments	Bed Places			
United Kingdom <sup>(a)</sup>	29.725	610.054	45.439	793.826	28.356	730.880	19.8	-7.9	40.8
Spain	3.002	228.601	5.467	304.039	6.400	400.329	75.1	31.7	57.4
France	5.406	284.740	5.096	339.054	5.037	379.301	33.2	11.9	21.4
Portugal	1.553	183.676	1.568	195.570	1.738	227.283	23.7	16.2	55.8
Ireland	n.a.	n.a.	5.449	138.579	4.407	148.653	-	7.3	71.8
Germany	3.985	<b>133456</b>	<b>1995</b>	140.372	3.547	137.063	2.7	-2.4	26.9
Netherlands	n.a.	n.a.	1.755	117.290	1.940	131.763	-	12.3	20.3
Denmark	564	98.991	466	62.107	480	69.932	-29.4	12.6	17.9
Sweden	n.a.	n.a.	297	32.648	280	34.178	-	4.7	22.0
Belgium	643	32.398	611	31.430	550	29.912	-7.7	-4.8	30.3
<b>TOTAL</b>	<b>44.878</b>	<b>1.571.916</b>	<b>70.025</b>	<b>2.154.915</b>	<b>52.735</b>	<b>2.289.294</b>	<b>45.6</b>	<b>6.2%</b>	<b>34.3</b>

**Source: Authors' processing of Eurostat database**

<sup>(a)</sup> The number of bed-places in all collective establishments in 1995 does not include North Eastern Scotland, Eastern Scotland, Highlands and Islands, West Wales and The Valleys, East Wales and South Western Scotland because they are not available.

## Baltic regions: natural heritage as a key asset

The aspect best representing tourism development in the Baltic Sea area is the common purpose to create an integrated tourism system for the economic growth of the interested countries. The *Baltic Development Forum*, an independent non-profit networking organisation including members of large companies, major cities, institutional investors and business associations in the Baltic Sea region, is deeply involved in this project.<sup>11</sup> Although the World Travel & Tourism Council (WTTC) forecasts for 2006 showed that the travel and tourism industry is not

<sup>10</sup> Data only refer to European regions bordering by the Atlantic Ocean and the Northern sea, as classified by Eurostat NUTS II level. **Spain** includes: Galicia, Principado de Asturias, Cantabria, País Vasco, Andalucía; **France** includes: Picardie, Haute-Normandie, Basse-Normandie, Nord - Pas-de-Calais, Pays de la Loire, Bretagne, Poitou-Charentes, Aquitaine; **Germany** includes: Bremen, Lüneburg, Weser-Ems, Schleswig-Holstein; **Ireland** includes: Border, Midland and Western, Southern and Eastern; **Netherlands** includes: Groningen, Friesland, Flevoland, Noord-Holland, Zuid-Holland, Zeeland, Noord-Brabant; **Portugal** includes: Norte, Algarve, Centro (PT), Lisboa, Alentejo; **United Kingdom** includes: Tees Valley and Durham, Northumberland and Tyne and Wear, East Riding and North Lincolnshire, North Yorkshire, Lincolnshire, East Anglia, Essex, Kent, North Eastern Scotland, Eastern Scotland, Highlands and Islands, Cumbria, Cheshire, Lancashire, Merseyside, Herefordshire, Worcestershire and Warwickshire, Berkshire, Buckinghamshire and Oxfordshire, Surrey, East and West Sussex, Hampshire and Isle of Wight, Gloucestershire, Wiltshire and North Somerset, Dorset and Somerset, Cornwall and Isles of Scilly, Devon, West Wales and The Valleys, East Wales, South Western Scotland, Northern Ireland; **Sweden** includes: Västsverige; **Denmark**: is all included.

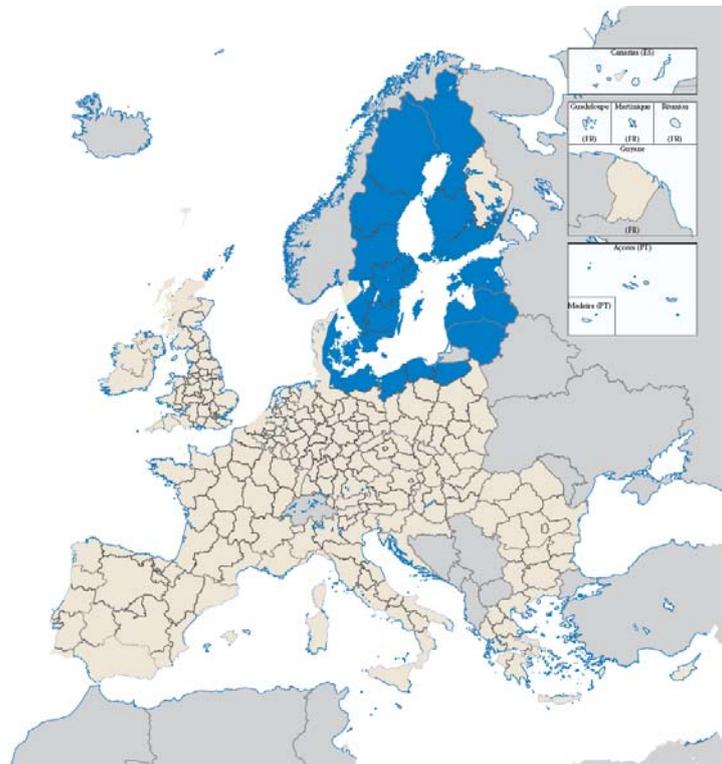
<sup>11</sup> The organisations mentioned also include countries not belonging to the European Union.

particularly important for growth and employment in Baltic Sea countries, their natural and cultural attractions could change this trend.<sup>12</sup>

Destinations bordering the Baltic Sea attract tourists mainly because of their natural and cultural heritage and landscapes:

- the Danish coast is especially known for its charming costs and for its particular cultural offer of castles and manor houses, and for first-class bathing beaches;
- West Estonia, similarly to Latvia and Lithuania, has picturesque seashores and varied landscapes as well as hiking and nature study routes, bicycle routes, and the opportunity to experience traditional ways of life. Beside the major seaports there are also small fishing villages and a particular natural heritage made up of sandy beaches, dunes and rock formations;
- the natural heritage offered by Finnish coastal regions provides the theme for some of the most important tourist destinations, while the Swedish coastal regions boast one of the most important navigation traditions, especially in the city of Stockholm where there is a famous sailing school.

**Map 2. Baltic Regions**



**Source: Authors**

Some German and Polish regions seem to be characterised by a tourism model which is similar to the Mediterranean urban one, however. This means sandy beaches, seaside resorts and tourist entertainments with a varied combination of attractions, the possibility of practising golf, kite surfing, skating, cycling, diving and fishing, as well as opportunities for visiting spas, experiencing farms and lighthouses, and gastronomy.

<sup>12</sup> The percentage contribution of the travel and tourism industry to GDP in 2006 is 3% for Denmark, 3.5% for Estonia, 3.2% for Finland, 2.7% for Germany, 1.3% for Latvia, 1.6% for Lithuania, 2% for Poland and 2.7% for Sweden.

Swedish coastal regions have the highest number of hotel bed places in the European Baltic Sea area, even though between 1995 and 2005 Estonia, Lithuania and Poland recorded the steadiest growth, revealing their role as emerging European tourism destinations.

Finally, nights spent by domestic visitors, which accounted for about 70% of total nights in all the years considered, show that the Baltic Sea coast is generally characterised by domestic rather than foreign tourism.

Table 5 shows the main accommodation capacity indicators in the Baltic regions.

**Tab. 5 – Capacity of “hotels and similar establishments” in *Baltic regions*<sup>13</sup> - 1995, 2000, 2005 (ordered by bed places in 2005)**

	1995		2000		2005		Var. % Bed Places 05/95	Var. % Bed Places 05/00	Hotel Bed Places. '05/All Bed Places '05 (%)
	Establishments	Bed Places	Establishments	Bed Places	Establishments	Bed Places			
Sweden <sup>(a)</sup>	1.330	127.209	1.609	155.641	1.577	163.292	28.4	4.9	28.2
Germany	2.683	104.322	2.944	130.329	2.716	131.427	26.0	0.8	25.8
Finland	936	105.030	1.011	117.322	938	117.605	12.0	0.2	55.9
Denmark	564	98.991	466	62.107	480	69.932	-29.4	12.6	17.9
Poland	233	19.333	314	26.428	446	36.597	89.3	38.5	16.1
Estonia	160	10.576	350	16.292	317	25.228	138.5	54.8	66.2
Lithuania	143	9.765	227	11.489	331	19.940	104.2	73.6	66.1
Latvia	135	13.376	166	11.890	337	19.229	43.8	61.7	80.0
<b>TOTAL</b>	<b>6.184</b>	<b>488.602</b>	<b>7.087</b>	<b>531.498</b>	<b>7.142</b>	<b>583.250</b>	<b>19.4</b>	<b>9.7</b>	<b>25.3</b>

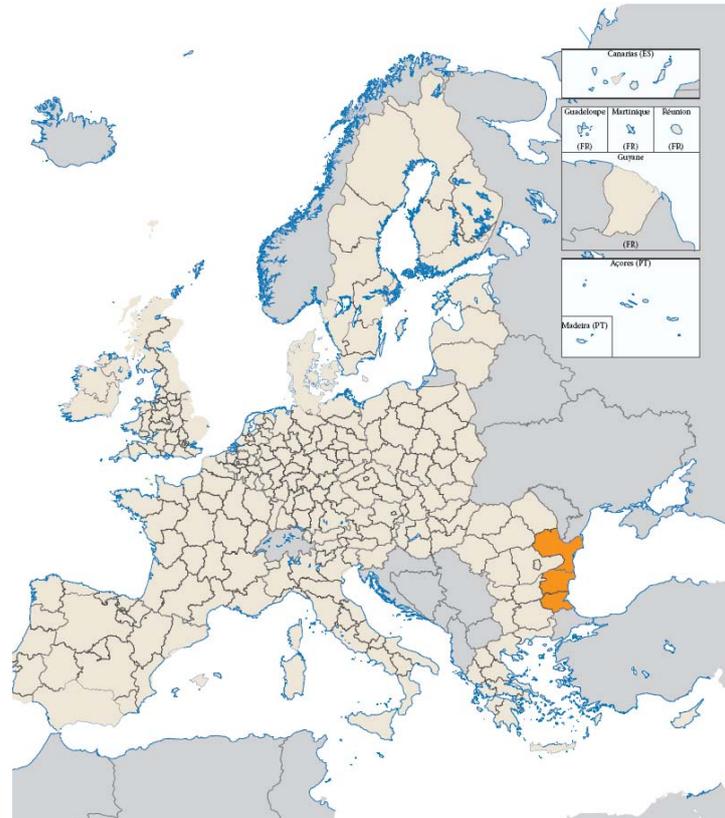
Source: Authors' processing of Eurostat database

<sup>(a)</sup> The number of establishments and bed places in 1995 in Småland med öarna is not available.

<sup>13</sup> Data only refer to European Baltic regions, as classified by Eurostat NUTS II level. **Denmark, Eesti, Latvija and Lietuva** are all considered; **Germany** includes: Mecklenburg-Vorpommern, Schleswig-Holstein; **Poland** includes: Zachodniopomorskie, Warmińsko-Mazurskie, Pomorskie; **Finland** includes: Itä-Suomi, Etelä-Suomi, Länsi-Suomi, Pohjois-Suomi, Åland; **Sweden** includes: Stockholm, Östra Mellansverige, Sydsverige, Norra Mellansverige, Mellersta Norrland, Övre Norrland, Småland med öarna.

## Black Sea regions: new mass destination and health tourism

Map 3. Black Sea Regions



Source: Authors

Although mass tourism development in the Black Sea coastal regions has relatively recent origins, tourism statistics demonstrate their increasing popularity.

In the last ten years the most popular European coastal destinations, namely the Mediterranean regions, have been mirrored by the regions bordering on the Black Sea. Focusing on their natural and cultural heritage, they have developed the typical Mediterranean urban tourism model, and offer a combination of sandy beaches, ancient monuments and modern resorts aimed at addressing the demands of international tourism.

In Bulgaria the number of establishments increased at an average rate of +13.7% each year in the period 2000-2005. Although the sea resorts along the coastline are the result of tourist development over the last decade, big hotels, motels and tourist properties in Varna and Bourgas have been tourist destinations since early times. With its port, Varna is the centre of the North Black Sea coastline, and is noted for its cultural heritage, while Bourgas is one of the most important industrial centres in the country.

Romania, another emerging Eastern European tourism destination, recorded a positive balance of 136m Euros in 2005, comparing tourism expenditure and receipts.<sup>14</sup> In Romania, the absence of tides and currents, combined with the medium latitude, the low altitude and the eastern exposure of the coast, results in a long tourism season, with over 14 hours of sunshine a day at

<sup>14</sup> Source: Eurostat Pocketbooks – Tourism Statistics, 2007 edition.

the height of summer, 24-25 sunny days a month in the summer, and water temperatures between 23° and 26°C in July and August. The gateway to all the coastal destinations is the city of Constanta, the main Romanian port. The tourism model characterising this European coastal area is similar to that of Bulgaria. Apart from the modern facilities offered by the seaside resorts, tourists can visit many historical sites, ancient monuments and traditional villages preserving their cultural heritage. The Romanian coastal region of Sud-Est is also famous for its vineyards, and its spas, especially in Eforie Nord and Mangalia where there are specialised mud-baths.

Table 6 shows the main accommodation capacity indicators in the Black Sea regions.

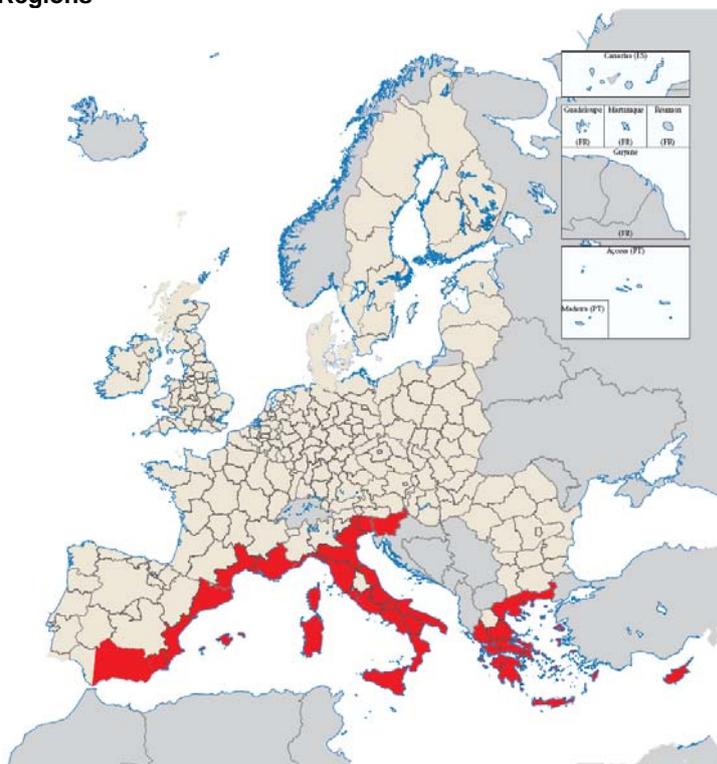
**Tab. 6 – Capacity of collective tourist accommodation in *Black Sea regions*<sup>15</sup> - 2005 (ordered by total places)**

	Hotels and similar establishments			Other collective establishments, Total			Collective tourist establishments, Total		
	Establishments	Bed Places	Average size	Establishments	Bed Places	Average size	Establishments	Bed Places	Average size
Bulgaria	703	154.283	219.5	126	10.806	85.8	829	165.089	199.1
Romania	904	94.065	104.1	324	38.900	120.1	1.228	132.965	108.3
<b>TOTAL</b>	<b>1.607</b>	<b>248.348</b>	<b>154.5</b>	<b>450</b>	<b>49.706</b>	<b>110.5</b>	<b>2.057</b>	<b>298.054</b>	<b>144.9</b>

Source: Authors' processing of Eurostat database

## Mediterranean regions: the 3S model

Map 4. Mediterranean Regions



Source: Authors

<sup>15</sup> Data only refer to European Black Sea regions, as classified by Eurostat NUTS II level. **Bulgaria** includes Severoztochen and Yugoiztochen; **Romania** includes Sud-Est. The 1995 and 2000 data are not available.

The Mediterranean coast seems to be the place where European tourism trends are best represented. The most significant growth occurred in the last 20 years: an increasing demand for high-quality holidays which has determined the combined development of accommodation, infrastructure and leisure facilities. Following this trend, if Slovenia is now strengthening its role as a tourism destination, the Greek, Spanish, French, Italian, Cypriot and Maltese coasts can be considered the most popular tourism destinations in Europe.<sup>16</sup>

Due to cultural, environmental, geographical and weather conditions, the attractiveness of Mediterranean coastal areas has greatly increased in recent decades.<sup>17</sup> Sun, urban beaches and low prices, especially for food and wine, are the main reasons for the continuous pressure on the Mediterranean Sea. The increasing number of low fare airlines, allowing people to travel at cheaper rates than ever, contributes to the growth of international demand.

Nevertheless, other new European destinations have become competitors to the more crowded Spanish, French, Italian and Greek coasts, which are still considered the most attractive tourist destinations in the Mediterranean area. In spite of the large number of visitors, Mediterranean coastal regions are suffering from the changes characterising the “new” holidaymakers more than other “younger” coastal regions in Europe.

Whereas in the 1960s and 70s tourists used to spend their holiday in the same place and for a long period, nowadays they prefer escaping from the cities on more occasions during the year, experiencing different kinds of activities.<sup>18</sup> For this reason, Mediterranean regions have started to develop other forms of tourism, connected to their coastal resources and landscapes and to their cultural and natural heritage. Fishing tourism, wine-tasting, gastronomy, health and wellbeing, and green tourism are just a few examples of this trend. This kind of supply also responds to the climate change phenomenon, which is influencing the way of life near the sea as well as the tourists’ behaviour.

Combining all these characteristics, the Mediterranean area is typified by seaside resorts, new accommodation forms related to “green tourism”, and health and beauty centres, all aimed at satisfying the needs of family atmosphere and authenticity.

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<sup>16</sup> This includes Croatian regions, although they do not belong to the European Union.

<sup>17</sup> According to WTTC’s forecasts, the percentage contribution of the travel and tourism industry to EU GDP in 2006 is 6.5% for Greece, 6.9% for Spain, 4.4% for France, 4.6% for Italy, 10.7% for Cyprus, 13.2% for Malta and 3.4% for Slovenia.

<sup>18</sup> Regarding tourism demand, the number of nights spent in Mediterranean hotels and similar establishments increased by 24.7% between 1995 and 2005, but was more or less stable in 2005 compared to 2000 (-0.1%). At the same time, the steady growth of arrivals between 1995 and 2005 (+42.7%) and since 2000 (+6.6%) meant the reduction of the average length of stay from 4 days in 1995 to 3.5 in 2005.

Table 7 shows the main accommodation capacity indicators in Mediterranean regions.

**Tab. 7 – Capacity of “hotels and similar establishments” in Mediterranean regions<sup>19</sup> - 1995, 2000, 2005 (ordered by bed places in 2005)**

	1995		2000		2005		Var. % Bed Places 05/95	Var. % Bed Places 05/00	Hotel Bed Places. '05/All Bed Places '05 (%)
	Establishments	Bed Places	Establishments	Bed Places	Establishments	Bed Places			
Italy	22.463	1.245.482	21.943	1.348.571	22.125	1.493.005	19.9	10.7	43.9
Spain <sup>(a)</sup>	5.108	709.372	7.682	857.947	8.175	1.004.122	41.6	17.0	52.8
Greece	7.703	554.225	8.274	603.972	8.938	677.804	22.3	12.2	87.6
France	3.772	217.538	3.852	340.117	4.044	397.485	82.7	16.9	33.4
Cyprus	538	77.259	583	84.479	785	91.264	18.1	8.0	95.7
Malta	256	37.190	246	40.782	173	37.322	0.4	-8.5	98.2
Slovenia	307	30.755	448	30.576	344	29.971	-2.5	-2.0	46.4
<b>TOTAL</b>	<b>40.147</b>	<b>2.871.821</b>	<b>43.028</b>	<b>3.306.444</b>	<b>44.584</b>	<b>3.730.973</b>	<b>29.9</b>	<b>12.8</b>	<b>50.0</b>

Source: Authors' processing of Eurostat database

<sup>(a)</sup> The number of bed places in all collective establishments in 2005 does not include the “other collective establishments” of Ciudad Autónoma de Ceuta and Ciudad Autónoma de Melilla because they are not available.

## North Sea regions: cultural and traditional heritage

Map 5. North Sea Regions



Source: Authors

<sup>19</sup> Data only refer to European Mediterranean regions, as classified by Eurostat NUTS II level. **Greece** includes: Anatoliki Macedonia-Thraki, Kentriki Macedonia, Thessalia, Ipeiros, Ionia Nisia, Dytiki Elláda, Sterea Elláda, Peloponnisos, Attiki, Voreio Aigaio, Notio Aigaio, Kriti; **Spain** includes: Cataluña, Comunidad Valenciana, Illes Balears, Andalucia, Región de Murcia, Ciudad Autónoma de Ceuta, Ciudad Autónoma de Melilla; **France** includes: Languedoc-Roussillon, Provence-Alpes-Côte d'Azur, Corse; **Italy** includes: Liguria, Veneto, Friuli-Venezia Giulia, Emilia-Romagna, Toscana, Marche, Lazio, Abruzzo, Molise, Campania, Puglia, Basilicata, Calabria, Sicilia, Sardegna. **Cyprus**, **Malta** and **Slovenia** are all considered.

Because of climate conditions, many tourists visiting the North Sea regions experience the sea more as natural landscape than for the possibility of bathing. This means that much of the local tourism offer is concentrated on different sporting opportunities and on the natural and cultural heritage. For example, along the Belgian and Dutch coasts, tourists can find golf clubs, fashion shops, museums, art galleries and gastronomy, as well as health facilities.

The Danish coastline bordered by the North Sea offers a particular natural heritage: hills, plantations and waterside forests or small fjords, harbours, lakes and islets. The region of Funen is especially visited by tourists for its countryside, with small towns and villages, but also because it is characterised by well-preserved relics from the past.

Germany's North Sea coastal tourism is particularly dependent on its beaches and sports opportunities, such as bathing, sailing, surfing, kite surfing (facilitated by favourable wind conditions) and cycling. The North Sea Cycle Route, 6,000 km in length, is the longest in the world, crossing the whole of the German North Sea area and running through seven countries bordering the North Sea (including the UK and Denmark). Because of the climate, health is another increasing tourism market segment.

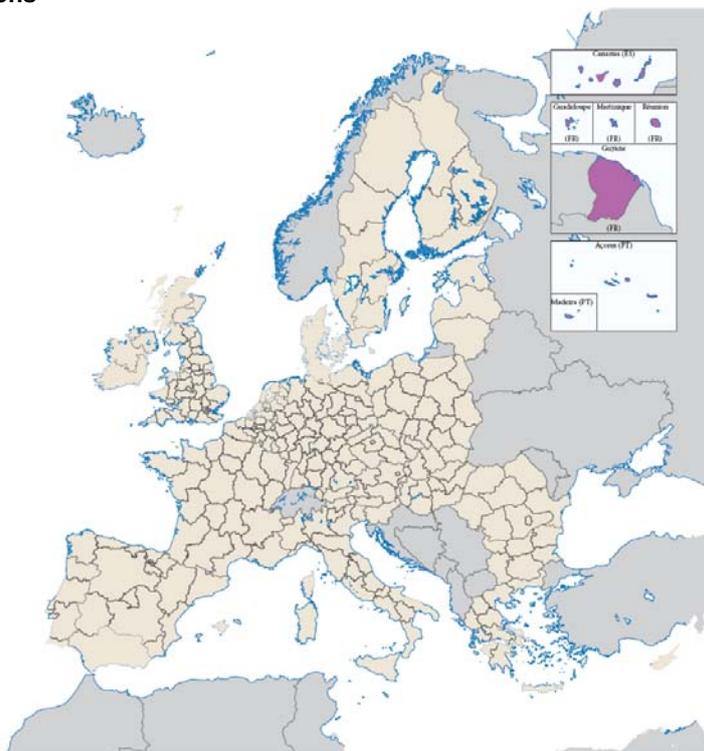
The United Kingdom's coasts are bordered both by the North Sea and by the Atlantic Ocean. This feature creates a special mixture of geographical and morphological differences which makes it one of the most interesting European coastal destinations. Focusing on the North Sea regions, there are fine examples of sandy beaches, cliffs, heritage attractions and nature reserves such as Bempton Cliffs in Yorkshire. Finally, Britain boasts a strong tradition of seafaring, boating and sailing,<sup>20</sup> as along the Swedish North Sea coastline.

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<sup>20</sup> Norfolk and Suffolk, the Firth of Forth and the Moray Firth (Scotland) are among the most popular places to sail along Britain's eastern coastline. Thurso and Tynemouth can be considered among the best surf beaches on the east coast.

## Outermost regions: exotic landscapes in Europe

Map 6. Outermost Regions



Source: Authors

Sea, sand and natural beauty represent the real attraction for international tourists visiting the Outermost regions. In spite of the increasing tourism development characterising these areas, the preservation of traditions and the authenticity of the typical way of life by the local population, represented in events usually staged for tourists, is known all over the world.

The Canary Islands, with their 1,114 km of coastline, have seen very great growth in hotel accommodation capacity in the last decade. Here tradition and modernity seem to live side by side: on one hand El Hierro, La Palma and La Gomera, the smallest islands, present very different landscapes, few tourists and little leisure infrastructure, and a precious natural heritage; on the other, Tenerife, the largest island, and Gran Canaria give tourists the possibility of practising many sports and offer the combination of golf courses, modern marinas, and health and beauty centres. Fuerteventura with its small coastal villages, and Lanzarote, world-renowned for its natural architecture, seem to share this continuous contrast between old and new.

The French outermost regions, Guadeloupe, Martinique, Guyane and Réunion, provide tourists with various activities connected to their natural and cultural resources.

- Guadeloupe and Réunion differ in their potential for practising several sports and experiencing sea and nature, such as climbing, golf, hiking, etc;
- the region of Guyane has a preserved natural landscape that stimulates eco-tourism, whereas Martinique boasts its great variety of landscapes and beaches.

Local handicrafts, religious and cultural traditions are the other elements of the tourism offer. The Região Autónoma dos Açores, with its nine islands steeped in folklore, offers tourists different landscapes, natural environment, choices of accommodation, and entertainment.

Finally, the natural environment, mild climate, tradition and customs, as well as different kinds of attractions and entertainment, attract tourists to Região Autónoma da Madeira.

All the Outermost regions recorded a steady growth of their hotel capacity between 1995 and 2000, but this trend seems to be slower between 2000 and 2005, especially for the French ones. This slowdown is mainly due to the ageing of infrastructures, but also, and especially, to the emergence of new tourist destinations in the Caribbean such as the Dominican Republic and Cuba. Moreover, unlike the Portuguese and Spanish outermost destinations, the French ones are mostly chosen by French people (86.4% in 2005).

Table 8 shows the main accommodation capacity indicators in the Outermost regions.

**Tab. 8 – Capacity of “hotels and similar establishments” in *Outermost regions*<sup>21</sup> - 1995, 2000, 2005 (ordered by bed places in 2005)**

	1995		2000		2005		Var. % Bed Places 05/95	Var. % Bed Places 05/00	Hotel Bed Places. '05/All Bed Places '05 (%)
	Establishments	Bed Places	Establishments	Bed Places	Establishments	Bed Places			
Spain	313	100.558	493	143.300	536	190.362	89.3	32.8	42.9
Portugal	180	20.375	218	27.388	274	36.531	79.3	33.4	93.0
France <sup>(a)</sup>	278	20.580	318	35.338	337	36.048	75.2	2.0	94.4
<b>TOTAL</b>	<b>771</b>	<b>141.513</b>	<b>1.029</b>	<b>206.026</b>	<b>1.147</b>	<b>262.941</b>	<b>85.8</b>	<b>27.6</b>	<b>47.0</b>

**Source: Authors' processing of Eurostat database**

<sup>(a)</sup> Data referring to Guyane in 1995 are not available.

## 2.4 Tourism and employment

Some coastal regions are highly dependent, in economic terms, on tourism. Although no statistics are available at regional level, consistent at EU level, on the relevance of the tourist sector to regional economies, if compared to the total number of employees, the number of those who work in hotels and restaurants can be considered a reliable proxy for estimating the importance of tourism in a local economy.<sup>22</sup>

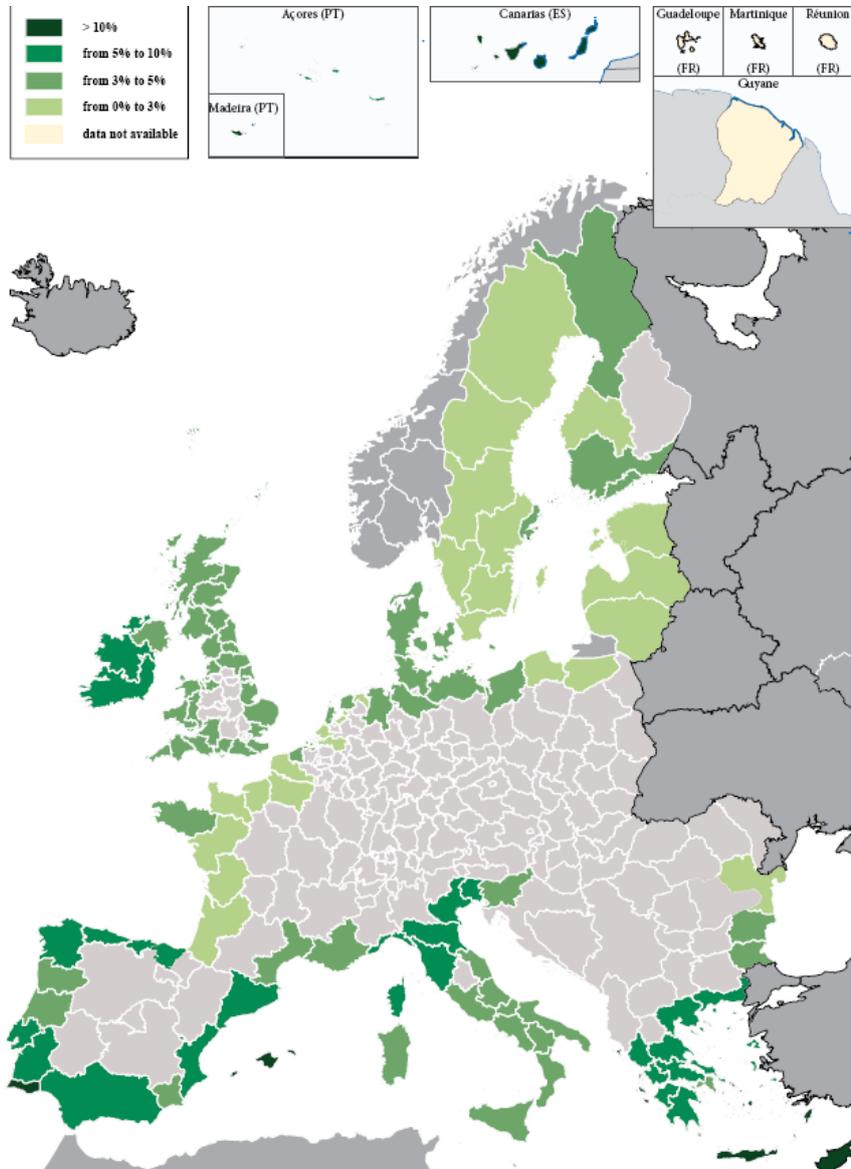
According to these data, in the Mediterranean macro-area, the Spanish region of **Iles Balears (20.2%)** and the Greek regions of **Ionia Nisia (18.8%)** and **Notio Agaio (18.6%)** seem to **have regional economies particularly dependent on tourism**: about one-fifth of the total number of employees work in hotels and restaurants. In most of the Italian coastal regions,

<sup>21</sup> Data only refer to European Outermost regions, as classified by Eurostat NUTS II level. **Spain** includes Canarias, **France** includes Guadeloupe, Martinique, Guyane and Réunion, and **Portugal** includes Região Autónoma dos Açores and Região Autónoma da Madeira.

<sup>22</sup> The European System of Accounts 1995 (ESA95, Eurostat) allows for the collection of these data at regional level. The Labour Force Survey (LFS, Eurostat) can make up for the lack of some information about employment in the tourism sector (NACE H) by collecting these data at national level. However, there are some differences between ESA 95 and LFS. The first one is related to national accounts and covers all people – both employees and self-employed – engaged in some productive activity in a specific region. It focuses on the location of the unit of production and ignores the residence of the employees. This feature characterises the LFS series, which considers all resident people working in productive activities, whether or not the activities are sited in the region. Hence ESA 95 is concentrated on the working unit and LFS on the employees.

especially in the southern ones, the same ratio is particularly low and it does not exceed 4.0%. The Mediterranean coastal region recording the greatest growth in tourism employment between 2000 and 2004 is Andalusia (+28.5%).

**Map. 7: Employment in Hotels and Restaurants on Total employment, 2004\***

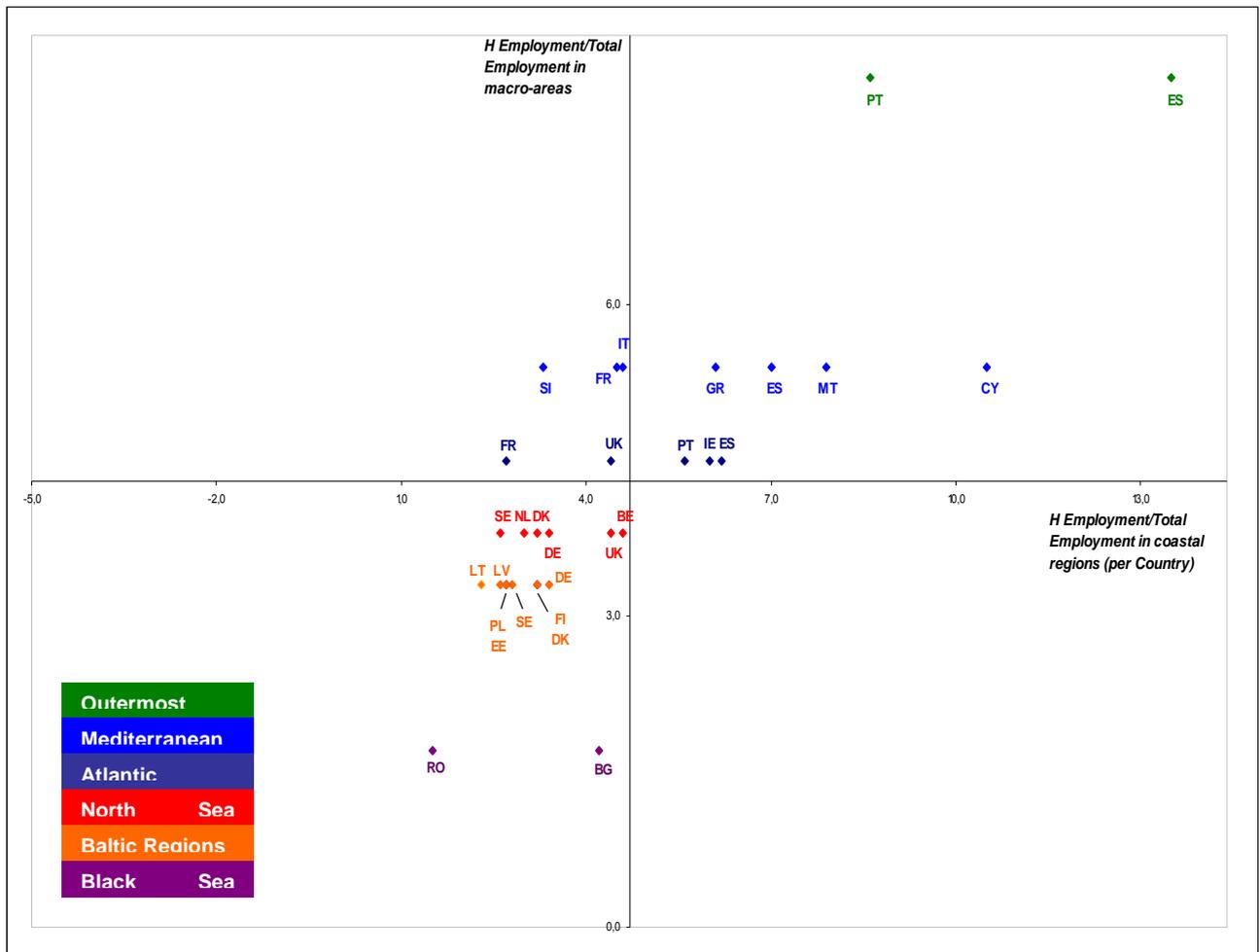


**Source:** Source: Authors processing of Labour Force Survey (LFS) data, Eurostat  
 (\*) For Germany, United Kingdom and Romania only national data are available

In comparison with the Mediterranean, Baltic regions are characterised by a low proportion of people working in tourism. Only 3.3% of the workforce in the macro-area work in hotels and restaurants. Among them, Stockholm (3.7%), in Sweden, Åland (3.6%), Etelä Suomi and Pohjois-Suomi, in Finland, Germany (taking the LFS data at national level) and Zachodniopomorskie (3.4%), in Poland, have the highest proportions. These data are similar to those in the North Sea macro-area, where the tourism sector employs 3.8% of the workforce. In Zeeland the ratio is 4.7%, in Prov. West-Vlaanderen 4.6%, and in the United Kingdom 4.4% (LSF data). The Portuguese region of Algarve, on the Atlantic coast, can be compared to Mediterranean destinations (18% of employees work in hotels and restaurants), especially considering the whole macro-area (where the ratio falls to 4.5%). Finally, although only 1.7% of

the workforce in the Black Sea macro-area is employed in the tourism sector, it is much more important for the economic structure of the Outermost regions (8.2%). In order to better represent this situation, Chart 2 compares the ratio between the number of employees in the tourism sector and the total number of employees in macro-areas (axis Y) with the ratio between the number of the employees in the tourism sector and the total number of employees in coastal regions of each country (axis X)<sup>23</sup>.

**Chart 2. “Touristicity” of the economy of the European coastal regions based on a study about employment in tourism sector - 200**



**Source: Authors processing of European System of Accounts 1995 (ESA 95) and Labour Force Survey (LFS) data, Eurostat**

Coastal regions of countries shown in the first square (Italy, French Mediterranean regions, Slovenia, United Kingdom, French Atlantic regions) belong to the Mediterranean and the Atlantic macro-areas, where the tourism sector appears to be really important. However, at a country level, they do not exceed the average value. The second square is characterised by the leaders of the European coastal tourism economy. The Outermost regions are deeply involved in the tourism industry, but Cyprus, Malta, Mediterranean and Atlantic Spain, Greece, Atlantic Ireland and Atlantic Portuguese coastal regions also show good performances. None of the European coastal regions occupy the third square, because all others are placed in the fourth

<sup>23</sup> The two axes cross at the respective average values: 4.3% for the first one and 4.7% for the other.

square. For both variables these regions do not reach the average values, but apart from the Romanian and Bulgarian coasts, they are not so far from average. This means that the tourism sector is strategic for the development of employment and economy in all European coastal regions, with the Outermost and Mediterranean regions showing the highest results.

### 3. The impact of Structural Funds on coastal tourism

#### Key findings

- The tourism industry benefits from **various assistance schemes** offered by the EU, even though there is no direct policy or funding mechanism.
- The **main financial resource** affecting tourism enterprises is represented by the SFs, in particular by the European Regional Development Fund (ERDF).
- In qualitative terms, SFs positively affected coastal tourism, especially in terms of **institutional building** and **enhancement of planning capacity**.
- In quantitative terms, the impact of SFs on coastal tourism is less clearly identifiable, due to the **cross-cutting nature** of the sector.
- The traditional approach in tourism interventions within the SF framework benefited **physical investments** in accommodation or transport infrastructure.
- Regional policies on tourism in the new programming period are moving towards a more strategic and **integrated approach**, focused on sustainable development issues.
- Joint action between the EU and Member States' governments could strengthen an integrated and effective **coastal management planning approach**.

#### 3.1 Overview

**The main direct funding sources for tourism at the EU level are the Regional Policy financial instruments, in particular the ERDF.** In fact, although no policies and financial instruments specifically devoted to tourism at European level are anticipated, as tourism is primarily of regional and national responsibility, nevertheless tourism interventions are part of broader EU macro-policies which can have a considerable impact on the sector.

**Most important coastal tourism destinations in Europe receive SF support through regional operational programmes (ROPs)** and, to a minor extent, sectoral national operational programmes (OPs). The interventions of direct support can include small tourism infrastructure, grant schemes to Small and Medium Enterprises (SMEs), beach renewal, urban regeneration, culture and artistic heritage support.

However, consideration should also be given to other EU thematic instruments, relating for instance to enterprise, transport, environment, employment, education and culture, which indirectly have relevant spillovers into the tourism sector (see Box 5).

**Box 5. Examples of EU thematic instruments affecting directly or indirectly the tourism industry**

- The “Competitiveness and Innovation Framework Programme 2007-2013” (CIP) will also support tourism enterprises by providing better access to finance and business support services, and encouraging innovation activities – DG ENTERPRISE AND INDUSTRY;
- The 7th EC “Framework Programme for Research, Technological Development”, which may result in benefits for the tourism sector in relation to research on information and communication technologies, satellite applications, cultural heritage and land use – DG RESEARCH;
- The LIFE, the financial instrument for the environment, contributes to the implementation, development and enhancement of Community environmental policy and legislation and works to integrate environmental concerns into other EU policies - DG ENVIRONMENT;
- “Leonardo da Vinci” Programme (part of the new Integrated Lifelong Learning Programme), in the form of a mobility programme for apprentices and young persons in initial vocational training. The Commission launched, in 2005, a preparatory series of studies which will serve to identify the main features of possible European apprenticeship-training models. Tourism has been identified as a possible pilot sector - DG EDUCATION AND CULTURE;
- The Culture Programme, which provides grants to cultural cooperation projects in all artistic and cultural fields – DG EDUCATION AND CULTURE;
- Policy frameworks such as: European Spatial Development Perspective, Sustainable Development Strategy, EU Environment Action Programme, and other relevant thematic strategies (marine environment, soil protection, urban environment) - DG ENVIRONMENT, DG REGIO.

Source: EU-Committee of the Regions, 2006 and DG Enterprise website ([http://ec.europa.eu/enterprise/index\\_en](http://ec.europa.eu/enterprise/index_en))

**The overall impact of SFs on regional development is varied. In qualitative terms SF have had a positive impact**, especially in terms of institutional building and enhancement of planning capacity. This is especially true for the new Member States, who were less used to participatory and bottom-up approaches in public planning.

In coastal tourism, the positive impact has led in particular to raising awareness in terms of the need for integration of policies for coastal areas, and the relevance of the environmental sustainability of interventions. This positive impact is reinforced by the joint action of SFs and other EU policies focused on coastal areas.

EU policies concerning coastal regions (maritime transport, industry, offshore energy, fisheries, the marine environment and others) have been developed separately. Although recent evidence shows that concern for sustainable development of coastal regions is taking place progressively in Europe,<sup>24</sup> in most Member States government action in coastal management planning is still defined only by guidance documents rather than regulatory instruments, so that **joint action between EU and Member States** (at national, regional and local level) **has been felt as necessary to provide effective policies to address the challenges that coastal regions are facing.**

The EU Integrated Coastal Zone Management (ICZM) (Box 6) should be considered in the broader framework of future Community maritime policy. In order to achieve sustainable development by reconciling the economic, social and environmental dimensions of the exploitation of the seas and oceans, in June 2006 the European Commission published a “Green

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<sup>24</sup> This is particularly true for the northern countries, where coastal zone plans concerning the protection of sites of natural and biological interest have been issued and information campaigns on coastal protection have been organised, usually by NGOs.

Paper” on the different aspects of maritime policy.<sup>25</sup> This document also examines the crucial role that sustainable tourism can play in local economies, and studies the interrelationship between land- and sea-based activities.

#### Box 6. Integrated Coastal Zone Management (ICZM)

The first attempt towards an integrated approach to coastal management was made by the Commission in 1995 with the pilot Projects on Integrated Coastal Zone Management (ICZM), comprising 35 pilot projects and 6 thematic studies. Drawing from the experience of those projects a Communication was produced in 2000,<sup>26</sup> where the integration of the various levels of governance was identified as a prerequisite for the success of the ICZM policy. The Communication addressed the issue of how to solve some of the fundamental problems relating to coastal regions: lack of information, insufficient involvement of the population in projects undertaken in coastal areas, and the lack of coordination among the various parties responsible for regional development planning.<sup>27</sup> The Strategy defines the EU’s role as one of providing leadership and guidance to support the implementation of ICZM by the Member States, at local, regional and national levels.

In order to encourage ICZM action at all administrative levels, the Strategy includes a set of recommendations to the Member States which were adopted by Council and Parliament on 30 May 2002.<sup>28</sup> Following an external evaluation on Member States’ implementation of the ICZM recommendations, which pointed out that the implementation is indeed a slow and long-term process, a new Communication of the Commission has been produced.<sup>29</sup>

**Source: European Commission, 2000**

In this context, it proposes a unique and integrated management of the sea and land in coastal areas, which requires integration of all sectors and at all administrative levels.

**In more quantitative terms, the impact of SFs on coastal tourism is less clearly identifiable.** Firstly, tourism is not a priority for SF interventions (such as for example transport, environment, innovation), so only a minor share of total SF spending (9.5% in Objective 2 regions, only 3.1% in Objective 1 regions) is spent on tourism.

Secondly, coastal tourism is embedded in the whole tourism offer of the region. Policy priorities of regional development plans only exceptionally focus specifically on coastal tourism; rather, they address the whole of the tourism offer. In some cases the regional strategy for tourism distinguishes among measures for coasts, for countryside and mountains, and for cities and historical towns. In others, coastal tourism and regional tourism coincide: this is the case of regions with the coast covering large part of the territory and where coastal tourism is the leading sector of the economy, such as for islands. On the other hand, coastal tourism may represent only one component within the whole tourist sector, as for instance in Romania, where other forms of tourism exist (mountain and cultural tourism), and seem to be considered as priorities by the national authorities.

<sup>25</sup> European Commission Green Paper: “Towards a future Maritime Policy for the Union: a European vision for the oceans and seas”. COM(2006) 275 final.

<sup>26</sup> Communication from the Commission to the Council and the European Parliament on "Integrated Coastal Zone Management: A Strategy for Europe" (COM/00/547 of 17 Sept. 2000).

<sup>27</sup> COM(2000) 547 final.

<sup>28</sup> European Parliament and Council, “Recommendation concerning the implementation of Integrated Coastal Zone Management in Europe”, 30 May 2002.

<sup>29</sup> Commission Communication on the evaluation of Integrated Coastal Zone Management (ICZM) in Europe, COM(2007)308 final of 7 June 2007

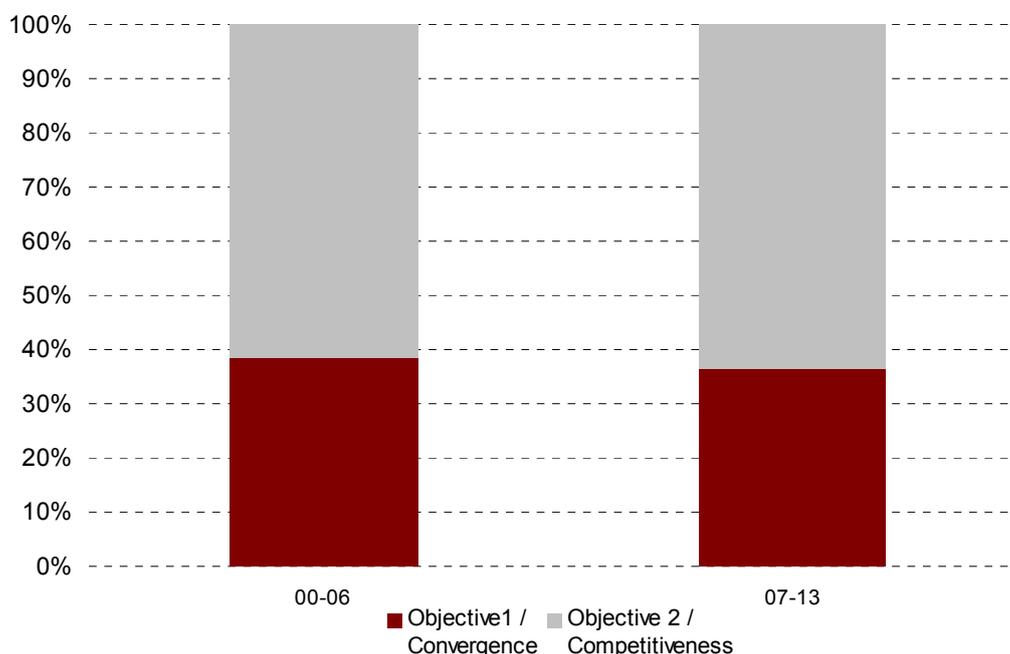
Thirdly, tourism is one among many sectors affected by broader strategies of regional development (such as enhancing the attractiveness of regions and fostering competitiveness). Tourism is rarely a stand-alone priority; usually it is associated with broader strategies of fostering competitiveness, diversifying productive activities within declining areas, and community-led economic and social renewal priorities. For this reason, measures specifically addressed to this sector are often diluted within broader strategies of urban regeneration or support for the productive environment.

### 3.2 Structural Funds for tourism

**Although tourism is not a priority for the Cohesion Policies, SFs provide a significant source of financing, especially in those regions whose economies are strongly dependent on tourism.** The main financial support for tourism, and consequently for coastal tourism, derives from the SFs and the Cohesion Fund.<sup>30</sup> During the 2000-2006 programming period, a large number of tourism interventions received support from EU funds, due to the cross-cutting nature of the sector and the related project proposals.<sup>31</sup>

The approach and the extent of this support vary according to the priority status of the regions. Moreover, it has developed from the previous to the current programming period. The majority of coastal regions receive support under the Objective 2 2000-2006 and Competitiveness Objective 2007-2013.

**Chart 3. Number of coastal regions by Objective in the current and previous programming periods, % of total**



Source: Authors

<sup>30</sup> See also: European Union, “Structural policies and European territory. Island and coastal regions”, 2001.

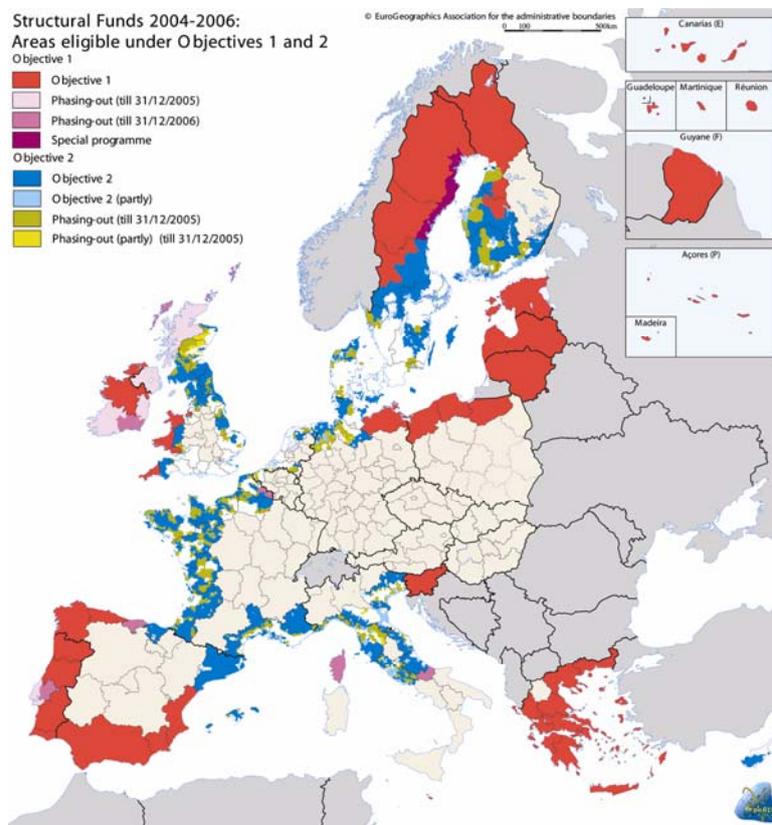
<sup>31</sup> Committee of the Regions, “Sustainable Tourism as a factor of Cohesion among EU Regions” 2006.

Table 10: Objective distribution of coastal regions in the period 2000-2006, EU 15

	Objective 1	Objective 2
Austria	0	0
Belgium	0	1
Denmark	0	1
Finland	2	3
France	4	11
Germany	1	6
Greece	12	0
Ireland	1	1
Italy	6	9
Luxembourg	0	0
Netherlands	0	7
Portugal	6	1
Spain	7	5
Sweden	3	5
United Kingdom	3	28
<b>Total</b>	<b>45</b>	<b>78</b>

Source: Authors

Map. 8 Objective distribution of coastal regions in the period 2000-2006, EU 15

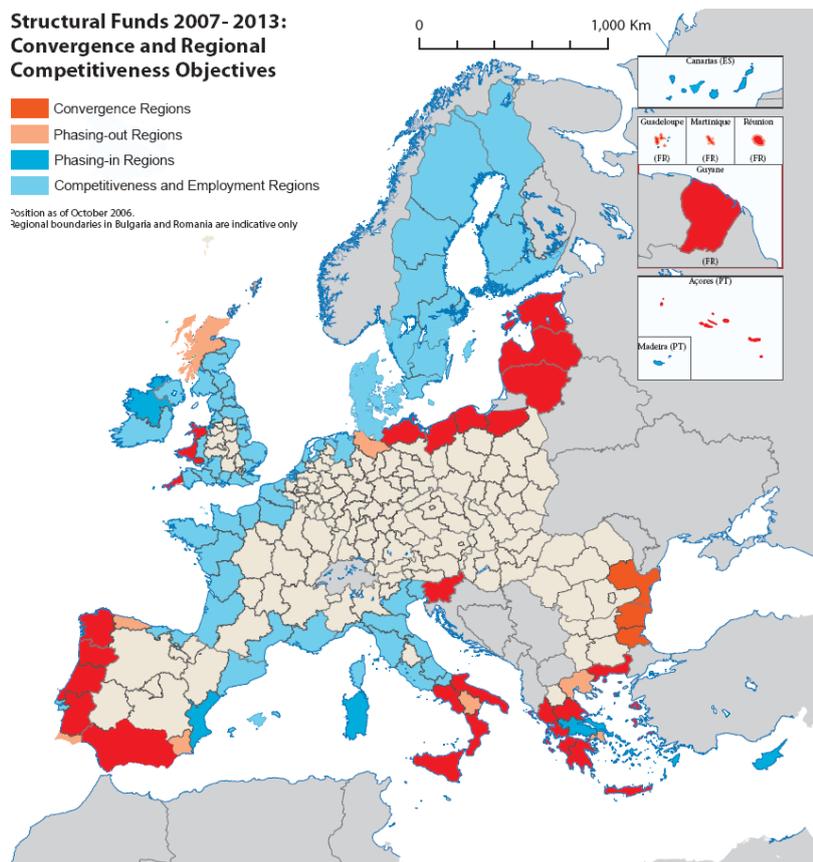


Source: DG Regio website

In terms of typologies of interventions, there is still a **predominance of physical and infrastructural investments aimed at increasing the accommodation supply and improving the accessibility of the area**, rather than non-physical interventions concerning service provision, territorial marketing and, in general, with the diversification of the tourism offer. This is typically found in Objective 1 regions, while for Objective 2 regions grant schemes to SMEs for increasing or improving the accommodation supply are traditional interventions in the sector.

The case studies shed light on two distinct dynamics, one between the two SF periods considered and one differentiating the old Member States from the newcomers (see Box 6). Evidence shows that in general the **tourism regional policies in the new programming period (2007-2013) are moving towards a more qualitative and integrated approach focused on reducing the pressure on the coasts** and on developing a more varied and developed set of activities and entertainment. This is also due to the new regulation requirements, in particular for the regions belonging to the Competitiveness Objective, allowing financial contributions in the tourism sector only to integrated and pilot projects.

**Map. 9: Objective distribution of coastal regions, 2007-2013, EU 27**



Source: DG Regio website

The new Member States, instead, seem to favour a more **traditional, pre-1999 approach, based on physical investment**, basically with **direct support for accommodation or transport infrastructure**. Providing a significant infrastructural supply is a major need, while the diversification and evolution of this supply into a more innovative range of leisure activities is still only a secondary priority. Tourism development, at this stage, requires improvements in accessibility to, and internal mobility within, coastal zones, in particular small islands, through

transport infrastructure investments. It calls for the supply of general services (health, water and energy supply, water and waste treatment) in order to improve the quality of life in coastal zones.

**Although good practices in using SFs for coastal tourism can be found, much is still to be done in terms of enabling local policy decision-makers to cope better with the challenges that coastal tourism destinations are facing.** Global competition and a more mature tourism demand require innovative approaches for improving the tourism offer. The need to address the seasonality of tourist flows, the growing demand for differentiated leisure activities apart from the “3S model” (sun, sea and sand), and increasing environmental pressures on natural resources, sometimes call for a re-shaping rather than a re-making of some of the most traditional coastal destinations.

**Box 7. Different approaches in tourism interventions within the SF framework: the cases of Marche (Italy) and Pomorskie (Poland).**

Marche	Pomorskie
<p>By contrast to the previous programming period (2000-2006), the new strategy adopted by the Marche Region underlines the necessity for promoting a more integrated regional tourism offering with the involvement of the hinterland. The new planning aims at creating tourist circuits capable of offering on the one hand new employment opportunities in the localities involved, and on the other hand providing the whole tourism sector with an innovative push to face the pressure of the international market.</p> <p>The plans for the current programming period would associate the attractions of the coastline with the cultural and natural heritage of the hinterland in the light of an integrated management. In practice, a partnership with the Chamber of Commerce has been set up to develop tourism products that, starting from sea-related attractions and services, lead the tourist to appreciate also the amenities of inland localities, through the discovery of their gastronomy, culture and way of life.</p>	<p>In the period 2007-2013 the main types of investments in tourism are funded by the Regional and the national Operational Programmes (OPs). In the first case, tourism and cultural heritage, SME support and regional and local infrastructure will make the greatest contribution to tourism development.</p> <p>In case of centrally managed OP Infrastructure and Environment (OP IaE), there are several transport infrastructure projects to be co-financed, among which are two motorways, railway modernisation, airport accessibility, and harbour infrastructure.</p> <p>Summing up, in the new programming period in ROP and in central OPs most of the projects are of infrastructural nature. Only a fraction of them support directly the tourist infrastructure and cultural heritage. However, as stated in the Strategy for Tourism Development, the <i>condicio sine qua non</i> for the exploitation of Pomorskie’s tourist potential is the improvement of the accessibility of the region.</p>

Source: Authors

### 3.2.1 The programming period 2000-2006

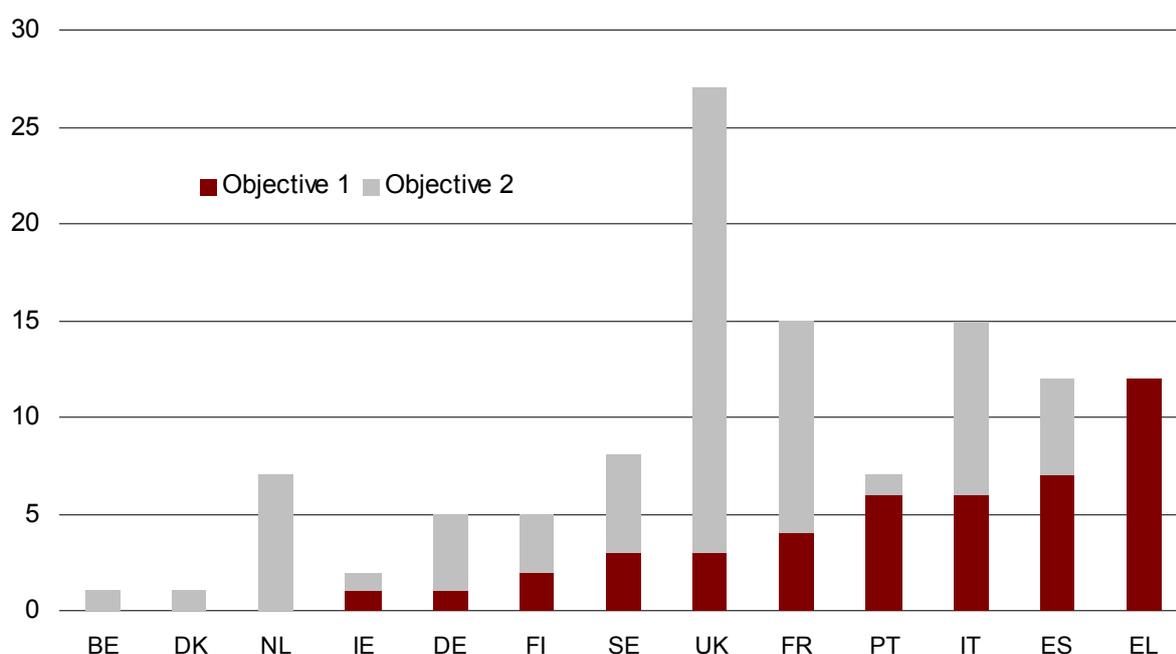
In the general guidelines established by the European Commission for the period 2000-2006,<sup>32</sup> tourism was mentioned as a key factor in achieving the regional competitiveness goal and with a high job-creation potential. More specifically, a balanced and sustainable development of tourism sector had to be pursued through

- the modernisation of infrastructure;
- the improvement of professional profiles;
- incentives for public-private partnership (PPP) and cooperation.

Attention was paid also to the safeguarding of environmental and cultural heritage, in line with the application of “Agenda 21” in the field of sustainable tourism.

In the 2000-2006 period, Objective 1, covering lagging regions, included most of the Mediterranean regions as well as all the Outermost ones. Other coastal areas, more developed but facing economic and social restructuring phases, were also able to benefit from the SFs under Objective 2, especially those dependent on fishing (see Chart 4).

**Chart 4. Number of coastal regions in the period 2000-2006, by Objective**



Source: Authors

<sup>32</sup> European Commission, “The Structural Funds and their coordination with the Cohesion Fund: Guidance for programmes in the period 2000-2006”, COM (1999) 344.

Beside the interventions under Objectives 1 and 2, the SFs also operated in the tourism field through the Community Initiatives (CIs):

- INTERREG: cross-border cooperation, trans-national cooperation and inter-regional cooperation;
- URBAN: economic and social regeneration in urban areas;
- LEADER+: Links between Actions for the Development of the Rural Economy;
- EQUAL: development of human resources.

Finally, the Cohesion Fund supported Spain, Greece, Ireland and Portugal in financing transport infrastructure and environmental protection measures, both important for the development of the tourism sector.

In general, the largest proportion of tourism-related interventions was financed by the ERDF and, to a minor extent, the European Social Fund (ESF). The regulations for ERDF<sup>33</sup> explicitly listed the development of tourism and cultural investment, including the protection of cultural and natural heritage.

In particular, the financial contribution of ERDF supported:

- the productive environment, in order to increase competitiveness and sustainable investment of firms (especially SMEs) and to make regions more attractive, by improving, for example, the standard of their infrastructure;
- the protection and the improvement of the environment, taking account the principles of precaution and preventative action in support of economic and local development.

Besides SFs, the European Agricultural Guidance and Guarantee Fund (EAGGF) was also designed to provide the sector with support, promoting the adaptation and the development of rural areas by means of farm tourism, protection of landscapes, encouragement of craft activities, and renovation of villages.<sup>34</sup>

In relation to the specific funding opportunities for tourism SMEs, several eligible actions were anticipated, such as:<sup>35</sup>

- quality improvement of accommodation, facilities, new attractions;
- marketing training for tourism entrepreneurs, marketing assistance in product development, sale and diversification;
- advice on business start-up for tourism entrepreneurs.

Excluding the transport sector, whose large investments would distort the analysis, **SF co-funded projects mainly in the field of productive environment**, by means of:

- encouraging tourism and craft activities within the development of rural areas;
- physical investments (information centres, tourist accommodation, catering, facilities);
- non-physical interventions (provision of tourism services, sporting, cultural and leisure activities, heritage);

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<sup>33</sup> European Commission, "Regulation (EC) No 1783/1999 on the European Regional Development Fund for the period 2000-2006", 12 July 1999.

<sup>34</sup> European Commission, Council Regulation No 1257/1999 of 17 May 1999 on support for rural development from the EAGGF

<sup>35</sup> European Commission, "European Structural Funds for small and medium enterprises (SMEs) and public bodies", Enterprise publications.

- shared services for the tourism industry (including promotional activities, networking, conference and trade fairs);
- vocational training.

Physical investments had by far the largest share of funds invested, together with interventions of maintenance of cultural heritage, while only minor proportions went to shared services for the tourism industry and vocational training.

As for the country breakdown, coastal countries were the ones which invested more in tourism.

In addition, SFs financed public projects which brought indirect benefits to the whole sector by making regions more attractive. For example:

- investment in tourist attractions by upgrading sport plants, swimming pools, cycle paths;
- investment in cultural heritage (museums, visitor centres, etc.);
- networking among tourist offices, local authorities and enterprises.

**Box 8. How SFs operate in the tourist sector: three examples of interventions*****Network of Small Places for Tourist Visits (Denmark)***

The proposal was to create a network in Bornholm Island, similar to a network of 40 smaller sites and places for tourist visits in south-eastern Sweden. The network has had fruitful cooperation on issues such as marketing and training, and would become interregional. The idea was proposed to 50 small tourism-related businesses on Bornholm including restaurants, museums and farm shops.

The objectives of the project were to exchange experiences and know-how, and initiate common development activities such as training, promotion, advice and support in responding to needs and demand. Expected outcomes include improved qualifications, marketing and promotion.

*Total eligible costs: 850,000 DKK*

*SF contribution: 50%*

***Territorial Integrated Programme, Penisola Sorrentina and Costiera Amalfitana (Italy)***

This project focused on diversification and improvement of the regional tourism offer. The initiative oversaw the wide improvement and upgrading of the seaside area in the agro, craft and services areas, protection of the mountains and coast, and greater integration with interior areas. Partners involved two provinces, several municipalities and other public bodies such as the Cultural Heritage Institute.

Expected outcomes include improvement of synergy between the various public institutional and private actors in commerce and tourism, the enhancement of accommodation, and upgrading of the cultural heritage, in the context of sustainable development.

*Total eligible costs: 25m Euros*

*SF contribution: 50%*

***Bremerhaven – Focus on fish (Germany)***

The “Fishing port showcase” project consists of the renewal of the old fishing port through the tourist development of the docks, by creating places to visit and shopping facilities, all with a fish theme. The most impressive creation is the new aquarium with North Sea and Atlantic fish species.

Another attraction is the "Atlanticum", a visitor centre providing information about the evolution of the sea, Arctic fauna, fishing methods, and also the history of the fishing port, the unloading of fishing boats, fish auctions and the everyday life of the port. Locations for business tourism are also included in the project: a hall for cultural events, a conference centre and an adjoining hotel. Finally, the project includes a training centre for unemployed people: the idea is to stimulate access to the job market as specialist fish sales staff or in the food and catering trade.

The “Fishing port showcase” attracts 800,000 visitors each year.

*Total cost of the project: 12.17m Euros*

*European Union contribution: 3.7m Euros*

**Source:** EC, DG Enterprise, Financial Support for Tourism in Italy and Denmark (available on <http://ec.europa.eu/enterprise>), InfoRegio ([http://ec.europa.eu/regional\\_policy](http://ec.europa.eu/regional_policy) )

### 3.2.2 The programming period 2007-2013

The Community Guidelines<sup>36</sup> for the current programming period confirm the relevant **role of tourism for economic regeneration based on environmental sustainability and innovation.**

Tourism is one of the sectors in which operations co-financed by SFs are desirable under various aspects in relation to:

- **accessibility**

SFs should finance infrastructure aimed at local development. In this respect, the guidelines mention tourism as an example, as a possible target sector for operations within the transport framework.<sup>37</sup>

- **urban regeneration**

SFs should "promote cities as motors of regional development".<sup>38</sup> In this field, co-financed operations should promote the rehabilitation of cultural heritage, favouring and increasing the attractiveness of the areas involved, and consequently the capacity for creating new jobs.

- **support to areas with geographical and natural handicaps**

In these territorial fields, SFs must be targeted at increasing the level of economic diversification. Given that many rural regions are highly dependent on tourism, operations should be targeted primarily at integration, protecting cultural and natural resources.

The ERDF possibly represents the main instrument of the Cohesion Policy. In the programming period 2007-2013, Regulation EC 1080/2006 dictates the main methods of implementation. However, **the ERDF acts in favour of the tourism sector in different ways, according to the target area to which each EU region belongs:**

- **In "Convergence" areas** Article 4<sup>39</sup> sanctions, among the **priorities directly relating to the tourism sector**, the need to develop new forms of sustainable tourism, enhancing natural heritage, and also supporting socio-economic development. **Aid is provided to improve the quality of tourism services to encourage new, more sustainable patterns of tourism.** Apart from this, investments in culture,<sup>40</sup> including protection, promotion and preservation of cultural heritage through the development of cultural infrastructures in support of socio-economic development, and improvement of regional attractiveness, are promoted. There are also types of operation which, although indirectly related to the tourism sector, have high levels of synergy and significant complementarity with aid for tourism, such as plans for the prevention of natural risks<sup>41</sup> and the promotion of initiatives aimed at creating new job prospects.<sup>42</sup>

- **"Regional Competitiveness and Employment" areas**, by comparison with the "Convergence" territorial areas, **do not provide aid for tourism *per se*.** In substance, Article 5<sup>43</sup> underlines that, for this type of area, **the main objective of ERDF aid is the protection and enhancement of natural and cultural heritage as territorial assets for sustainable**

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<sup>36</sup> Council Decision of 6 October 2006 on Community strategic guidelines on cohesion (2006/702/EC)

<sup>37</sup> Community guidelines,

<sup>38</sup> Community guidelines

<sup>39</sup> Regulation EC 1080/2006 Article 4 (point 6)

<sup>40</sup> Regulation EC 1080/2006 Article 4 (point 7),

<sup>41</sup> Regulation EC 1080/2006 Article 4 (points 4 and 5)

<sup>42</sup> Regulation EC 1080/2006 Article 4 (point 3)

<sup>43</sup> Regulation EC 1080/2006 Article 5

**development of the regions.** Therefore, in general, operations promoted by the ERDF in the context of tourism are closely related to environmental sustainability and to widespread enhancement of natural and cultural potential. In the C&E areas, the tourism sector can find support in the aid offered if it carries out particularly innovative entrepreneurial activities or actions aimed at increasing the accessibility of a region.

- In the area of European Territorial Cooperation, Article 6<sup>44</sup> of the Regulation establishes the ERDF methods for the eligible areas. Cross-border economic, social and environmental activities are promoted through joint strategies for sustainable territorial development, of particular impact for the innovative development of SMEs, tourism and culture.<sup>45</sup> Besides this, types of assistance that allow collaborative development of the capacity and joint use of infrastructures, in sectors considered crucial such as tourism,<sup>46</sup> are also considered.

Finally, Articles 8 and 10 underline how the ERDF supports actions inherent to tourism, for "Sustainable urban development" areas and "Areas with geographical and natural handicaps". In particular, the ERDF can support the development of participative, integrated and sustainable strategies to tackle the high concentration of economic, environmental and social problems affecting urban areas. These strategies promote sustainable urban development through activities such as strengthening of economic growth, rehabilitation of the physical environment, brownfield redevelopment, preservation and development of natural and cultural heritage, promotion of entrepreneurship, local employment and community development, and the provision of services to the population, taking account of changing demographic structures.<sup>47</sup>

Moreover, and only in "Areas with geographical and natural handicaps", the ERDF may in particular contribute towards financing investments aimed at improving accessibility, promoting and developing economic activities related to cultural and natural heritage, promoting the sustainable use of natural resources, and encouraging sustainable tourism.<sup>48</sup>

The ESF also indirectly guarantees financial support in favour of tourism with a view to strengthening the potential enjoyed by the sector, above all in the employment field. On the basis of Regulation 1081/2006, the ESF co-finances projects aimed primarily at enhancing professional skills through the provision of training courses and widespread training activities. Activities favouring labour mobility, such as the Lifelong Learning Programme set up in 2005, and in the first instance applied as a pilot project in the tourism sector, are also financed.

Although not strictly SFs, a certain support is also offered by the contribution of the European Agricultural Fund for Rural Development (EAFRD) and by the European Fisheries Fund (EFF), which provide areas in a critical state and with structural problems (in the agriculture and fishing sectors) with the opportunity to redirect their efforts towards the economic prospects of the tourism sector, allowing a higher level of profitability, in view of the positive response to these new forms of alternative tourism in its specific international market.

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<sup>44</sup> Regulation EC 1080/2006 Article 6

<sup>45</sup> Regulation EC 1080/2006 Article 6 (point 1/a)

<sup>46</sup> Regulation EC 1080/2006 Article 6 (point 1/e)

<sup>47</sup> Regulation EC 1080/2006 Article 8

<sup>48</sup> Regulation EC 1080/2006 Article 10

### 3.2.3. Sectoral policies supporting tourism

Measures addressed to coastal regions in other sectors (especially transport and environment) are often promoted as means for enhancing tourist flows. Policies of accessibility and environmental protection (two of the most significant policy priorities for the Cohesion Policies) could be seen as a means for improving the performance of the tourism sector, especially in peripheral areas such as the Outermost regions. In fact, a number of measures are targeted at coastal areas and not explicitly at tourism, but they indirectly contribute to its development.

Evidence from the case studies shows that regional development strategies in support of the tourism sector strongly rely on transport and environmental interventions, on the one hand to increase accessibility of the region and encourage tourist flows (especially from abroad), and on the other hand to improve the quality and availability of natural resources (drinking and bathing water, protection of biodiversity, reduction of pollutants and so on).

Transport and environment are a priority for SF interventions, absorbing a major share of their spending, especially in the Convergence regions, where the responsibility for the management of such plan are often at national level. However, transport and environment are key policies at EU level, far beyond the scope of SFs. This is, for example, the case for the EU policy of TEN-T priorities (see Box 9). The priorities of such policies are decided upon on a completely different basis to the SFs priority, and they have no direct relationships.

#### Box 9. TEN-T priority

Trans-European Transport Networks (TEN-T) include road and intermodal transport, waterways and seaports, and the European high-speed railway network. The ERDF, the Cohesion Fund, the European Investment Bank (EIB) and the European Investment Fund (EIF) contribute to the TEN-T budget. Generally, the goal of TEN-T policy is to favour the internal market and to contribute to a balanced development of the EU.

At present, on the top of the TEN-T agenda is the creation of real alternatives to land transport: in the White Paper “European transport policy for 2010: time to decide” the Commission identified as a priority the creation of intermodal transport networks in order to provide alternatives to “car-only” travel. Sea transport has been identified as one of the main solutions to road transport problems. As a result, one of the 30 TEN-T priority axes is the “Motorways of the Sea”, promoted by the Commission as alternative to land transport in four regions:

- the Baltic Sea (linking the Baltic Sea Member States with Member States in Central and Western Europe) (2010);
- western Europe-Atlantic Ocean, North Sea/Irish (2010);
- south-western Europe-the western Mediterranean Sea, connecting Spain, France, Italy and including Malta, and linking with the motorway of the sea of south-east Europe (2010);
- south-eastern Europe-Adriatic, Ionian and eastern Mediterranean Sea (connecting the Adriatic Sea to the Ionian Sea and the Eastern Mediterranean including Cyprus) (2010).

The aim is to improve shipping connections in order to reduce the congestion of road transport and facilitate the access to peripheral and island regions. The TEN-T programme also supports renewal and development of EU commercial sea ports: the aim is to increase port capacity and to favour intermodal transport activity. 19% of the selected proposals for the annual 2007 programme concern maritime ports.

Source: Authors

However, SFs and the Cohesion Fund are significant sources for TEN-T projects: in the period 2000-2006 these funds have contributed around 20 billion Euros to TEN-T projects, especially in Greece, Ireland, Portugal and Spain, which are the countries that benefited from the Cohesion Fund in this period. In the SF framework, transport infrastructure projects can be financed either for the development of TENs (mostly in the Convergence regions), or for the access to TENs (for the C&E regions). Through the Cohesion Fund, significant achievements have been made: between 1993 and 2001 the motorway network has more than doubled in Greece, Ireland and Portugal (Spain faced a less consistent growth in road network, but still faster than the EU15 average).

Thanks to TEN-T corridors, coastal areas may be better connected to inland areas of the EU, with possible positive consequences on coastal tourism development. However, it is hard to assess the impact of TEN-T on tourism, while other important changes have occurred in recent years. First of all, the increasing number of low-cost airlines companies significantly affected tourist demand, which seems to be more affected by financial costs than time savings.

### 3.2.4. A new approach for tourism support

Rapid review of the regulatory sources and of strategic community documents has shown that **a significant change in strategy has taken place in the current period**. The new vision of development characterised by innovation and sustainability also involves potential actions in the tourism sector, making the attraction of new visitors one of the fundamental instruments for specific geographical areas.

**The main innovation is represented by an even closer link between "environmental sustainability" and tourism, which is now seen as an instrument for protecting cultural, landscape and environmental heritage, and not merely as the driving force of local development.** In fact, all objectives and regulations underline the need to define SF assistance as "sustainable tourism". This becomes urgent and binding for urban areas and for the C&E objective.

The second strategic indication, complementary to the previous one, is integration of actions. For example, **infrastructural actions for transport must be synergic with objectives for the development of tourism** as part of urban regeneration or restoration with a view to increasing the attraction of cities. In such cases, the option of integration also becomes an operational necessity in C&E regions, both due to the lower availability of resources and to the type of actions envisaged, as described above.

The third important characteristic of the new actions is their territorial aspect. Building sustainable tourism becomes one of the main objectives for the development of areas with handicaps (island and mountainous areas), for cities and for border areas. In this case, as there is a strong awareness of the intrinsic fragility of these areas, the approach must be directed at enhancing and protecting the environmental heritage, acting in innovative and sustainable ways.

In the new programming period, 2007-2013, tourism remains and strengthens its validity in the sphere of regional development. It becomes an essential driving force for economy in cities, mountainous areas, islands and all border regions. However, above all in C&E regions, **assistance co-financed by SF resources requires an integrated, innovative and primarily sustainable approach aimed at addressing the environmental challenges of the continent (global warming, protecting biodiversity, and reducing pollution).**

Also for the new programming period, tourism represents a strategic sector for Cohesion policy. This role is deduced not only from the importance it is given in the various policy documents and regulations described above, but above all from a first rapid review of the programming documents approved, or in the process of being approved, by the Commission. Although using different methods, the ROPs of both Convergence and C&E areas have allocated space for actions in the tourism sector.

However, the noticeable added value of innovation is that tourism has become the sector where integration is implemented most in two different dimensions: of actors and of policies. In the first, owing to its specific nature, public and private partnership has become a necessary condition for Community assistance. In the second, especially in C&E areas, urban areas and areas with handicaps, as already mentioned, tourism represents the catalyst of actions belonging to different policy frameworks, such as enhancement of cultural heritage, environmental protection, accessibility, and entrepreneurial development, often with innovative methods.

The integrating characteristic, with particular importance given to environmental aspects, also seems to be one of the main characteristics for specifically coastal tourism. However, even more important is the further dimension of trans-border integration, where an initial empirical evaluation of the Cooperation Programmes of coastal regions highlights the importance of tourism, almost always defined on the basis of sustainability.

To conclude, in the new programming period, **tourism** in general, and coastal tourism in particular, takes on an importance that is above all cross-cutting, **as an element of integration between actors, both public and private sector, and policies concerning the environment, development, innovation, territories and regions.**

## 4. Actors and partnership

### Key findings

- The impact of SFs in coastal tourism on **developing the partnership principle** is highly positive.
- The degree of involvement of actors is **more visible during the design and planning stages** rather than in the projects' implementation phase.
- **Local public authorities** in coastal areas usually play the most active role in coastal tourism partnerships.
- **Environmental bodies**, representatives of the **productive sectors** related to the sea, actors in the **cultural sectors**, and the **scientific community** should be more involved in coastal tourism partnerships.
- **Cross-border initiatives** in coastal areas can significantly contribute to achieving a high quality of partnership.

### 4.1 Overview

**The impact of SFs on developing the partnership principle<sup>49</sup> in designing regional development policies is significantly positive and the most relevant.**

The bottom-up approach and the partnership principle are two of the main principles of regional development in the European Union. In the old Member States, a longer tradition in management of the SFs and different institutional settings make the partnership process quite consolidated. In most cases in those countries, all the relevant institutional and socio-economic actors are involved in the design and implementation of the programmes.

In the new Member States, the partnership principle and the bottom-up approach have been developing as a direct consequence of the European integration process. In some cases the partnership principle has not been fully applied yet, and not all the relevant territorial actors were involved in the planning and implementation phases of the SF programmes. The level of decentralisation to regional and local level is still low, and it is coupled with a lack of management capacity and expertise in the regional and local administrations.

The governance framework in the tourism sector is characterised by a multi-level, multi-sectoral dimension. As pointed out also by the new EU Maritime Policy, **a special effort must be put into governance since the coast-land interface involves a mix of properties, multiple users and multiple jurisdictions. If an integrated approach to design and planning is not put in place, there is a risk of conflicting measures to be pursued.** This is particularly evident as regards the environmental aspect: natural assets of a region are sometimes still perceived as a

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<sup>49</sup> According to the EU Regulations (Art. 11, EC Reg. N.1083/2006) the process should include on the one hand consultations between all the levels of public administration, from the local level to the national level, and on the other a solid PPP.

constraint to a proactive policy of construction and exploitation of the territory, rather than as a value to be preserved as fundamental to the attractiveness of a place.

Multi-administrative layers of institutions are engaged in the design of tourist strategies, for example national ministries of tourism and culture, regional and local agencies for development, special agencies for tourism development, and local offices in municipalities or groups of villages. **A tourist plan must be interdisciplinary and the process should be both collaborative and integrative.** Adequate public infrastructure and good networking and cooperative attitudes among all the relevant stakeholders and the general public are the only approach which can guarantee the success of a sector where the tourist usually takes a decision in favour of a destination which can offer a set of differentiated recreational experiences.

In the new Member States the decentralisation process is still weak, so national competences in the field of tourism are more significant than in the old Member States where tourist destinations find a more appropriate level of responsibility at the local level. With regard to the tourism sector, SFs contributed to an exchange of ideas between all the affected actors on how to transform the tourism sector into an instrument for regional development, and to the strengthening of the partnership on the one hand between the regional and national public authorities, and on the other hand between the public authorities and social actors.

## 4.2 Degree of involvement

At the local level, the structures of delivery partnerships in coastal tourism projects vary and are greatly dependent on the socio-economic and institutional context (old vs. new Member States, urban vs. rural).

**The degree of involvement of actors is more visible in the upstream activities of design and planning rather than in the implementation and delivery mechanisms.** This usually increases the short-term perspective of the planning exercise and does not help in the dialogue and clear sharing of the policy visions, while successes are recorded when the role of actors is more proactive and relevant in all the policy phases.

For example, in the case of the partnership set up by the Marche Region, a significant contribution was made by environmental bodies: their input during the planning phase led to some inclusions in the OP aimed at achieving greater synergy between tourism and environmental sustainability. In particular, they proposed **the inclusion of managers of protected areas among those implementing a measure aimed at environmental and territorial reclassification and among the beneficiaries of the specific measure related to the promotion and valorisation of the historical and cultural heritage.** This practice proved to be very useful for an effective implementation of the measure and for active participation of the relevant stakeholders.

**In general, the learning process in managing partnerships is providing good results.** In Guadeloupe, after a period where the environmental issues were completely disregarded and private investors promoted a very aggressive policy (draining ponds and lakes, increasing urbanisation and population concentration on the coasts), perceiving natural assets as inimical to their purposes, in the new programming period great emphasis has been given to natural protection and valorisation measures. In 2005-2006 a new public policy for sustainable tourism in Guadeloupe became achievable. The partnership approach between professionals and public bodies proved to be a sound basis for boosting the tourism sector and for a clear sharing of

responsibilities. The Conseil Regional of Guadeloupe and the SFs will mainly support modernisation and renovation of hotels and a diversified range of accommodation for tourists, while the State will support promotion of tourism and local trade, with marketing of local products.

### 4.3 Typology of actors

A multiplicity of actors have an interest in the effect of tourism policies, and often the potential outcome is conflict between stakeholders. For this reason, a large partnership should always be the optimal practice at local level in the implementation of tourism strategies.

**Local public authorities in coastal areas usually play the most active role in coastal tourism partnerships.**

The evidence shows that, in the best examples, the following actors are involved in the planning and implementation phases: regional and local public authorities, private sector representatives (owners of hotels and other accommodation facilities), environmental associations, and chambers of commerce (see Table 12).

However, a more progressive approach to coastal tourism would require that **not only local authorities and private entrepreneurs should be the key actors within an effective partnership, but also environmental bodies, representatives of the productive sectors related to the sea (fishing for example), experts and actors in the cultural sectors, and the scientific community with an interest in sea-related activities.**

Tourism is a cross-cutting sector and in view of the complexity of the relationships and activities affected, all the parties concerned (economic, social, environmental actors, the organisations representing coastal zone residents, non-governmental organisations (NGO), the business sector, etc.) should be involved in the planning and managing process. All the stakeholders should be, in fact, fully supportive of the restraints to which they are going to be subjected and in order to understand the side-effects of the action envisaged.

**Table 12. Partnership: examples of actors involved in some tourism-related projects in the period 2000-2006**

Pomorskie: "Inspected Accommodation Region" brand tourist product	South East Romania: "Project for coastal protection and rehabilitation in Mamaia South and Eforie North"	Guadeloupe: "Hotel Fort-Royal"
<ul style="list-style-type: none"> <li>• The Association of Rural Tourism Brands (NGO)</li> <li>• The Museum of Central Pomerania and the theme park in Kluki</li> <li>• Local municipal councils of four municipalities</li> <li>• Slowinski National Park</li> <li>• Pomeranian Regional Tourist Organisation.</li> </ul>	<ul style="list-style-type: none"> <li>• Ministry of Environment and Water Management and the consulting group attached</li> <li>• Regional and Local Agency for Environment Protection</li> <li>• The Dobrogea Littoral Water Directorate</li> <li>• Delegation of the EC in Romania</li> </ul>	<ul style="list-style-type: none"> <li>• Private investor</li> <li>• General Council of Guadeloupe</li> <li>• Local hotel companies</li> <li>• Local authorities for trade, tourism and craft</li> <li>• Guadeloupe national park</li> </ul>

**Business associations for sea-related production activities (fisheries and aquaculture, shipping, etc) have a key role in the objective of revitalising the local economy**, since many coastal regions are facing economic decline and continuing job losses in such sectors. The tourism industry can provide successful solutions in the light of re-inventing a role for the people employed in the past in such sectors. For example, in the Pomorskie region many fishermen have received funding from Financial Instruments for Fisheries Guidance (FIFG) within a framework aimed at the change of usage of fishing boats, which became museums or leisure craft for tourists.

**The scientific community also has a significant role to play in the definition of priorities and identification of creative ways of exploiting and realising the value of natural resources.** This is particularly relevant for the strategy of diversifying the leisure opportunities offered to tourists. Maritime archaeology is increasingly becoming popular: the potential for developing this activity is great, and the opportunity to use it as a positive recreational resource is significant. Educational tourism is another way to combat the seasonality of coastal tourism.

At the project level it is necessary to include the resident community within the relevant stakeholders to be involved. **The local community should be consulted at an early stage and throughout the conceptual development of the project**, otherwise there may be a high risk of having a project rejected at a later stage. A good example of such an approach is illustrated in Box 8.

Particularly in the coastal areas where tourism does not represent the only economic activity, it is important to understand if the local residents are really involved with and supportive of a policy with a strong stake in tourism development. In fact, it is essential to start thinking in terms of general **territorial marketing**, aiming to identify the real nature and character of the area, and to reconcile the different stakeholders and their needs. In particular, it is vital that residents are involved from the beginning of the process.

#### **Box 10. The aquarium The Deep (city of Hull): a successful partnership example**

The Deep is a not-for-profit aquarium and visitor centre situated on the north bank of the Humber Estuary, dedicated to increasing people's enjoyment and understanding of the world's oceans.

Critical for the success of The Deep was that it was developed by a partnership of the public and private sectors, between the City Council (and led by the Council), the Natural History Museum (at an early stage), a private sector company, and the University of Hull.

Developing the concept of The Deep proceeded gradually, with the current Chief Executive guiding it in his then role as Director of Leisure Services at Hull City Council. There were initial phases of researching proposals and viability, refining the original scope and intentions of the project, until the final strong, visionary concept emerged.

The project went through constant fine-tuning, including discussions with key and wider stakeholder groups which led to it gradually and organically accumulating new characteristics that would enable it to be accepted. Thus, community engagement was key to the project's success; local support was built up during the development phases by explaining it to many local community groups. This was crucial to building the vision, as for some it was controversial. Many people thought that because of the nature of Hull, considered by its inhabitants to be an industrial city and port with no tradition of tourism, the project would not succeed.

**Source: Authors**

For cross-border regions the exchange and sharing with stakeholders and communities of the neighbouring regions can be a successful way of exploring new approaches of territorial marketing. **The Interreg Initiative of the Cohesion Policy can significantly contribute to the exchange of information of good practices in this field, promoting also cross-border actions in coastal areas** (see Box 11).

**Box 11. Interreg initiatives and partnership: the “Adriatic report” project and the North Sea Cycle Route**

***The Adriatic network***

The Interreg “Adriatic Report” project has two aims:

- to create a network of tourist marinas across the Adriatic from Marche to Croatia;
- to extend the local tourist and cultural offer by identifying tourist routes from the coasts to the hinterland.

In order to achieve such objectives, a complex partnership involving economic, social and institutional actors from Marche and Croatia was put in place for both the project planning and implementation phases. Given the strong administrative differences existing between the two countries and the presence of private sector representatives, an effort to formalise relations and standardise procedures was necessary.

Marche Region was the lead partner, with administrative and financial responsibility for the project. Croatian partners, even without budget ownership, have been continuously involved in the way the project was implemented in their territory. The process was highly complex due to some differences among the actors, particularly in the determination of qualitative standards in the context of environmental protection, and the variations between the SF mechanisms and the instruments of pre-accession, for which Croatia is eligible. However, the willingness to overcome challenges and make the project work has remedied such problems and contributed to obtaining a successful outcome, indicating that cross-border cooperation can be seen as a useful tool for the strategic development of coastal tourism.

***Cycling around the North Sea***

The North Sea Cycle Route project involved six countries bordering the North Sea: Sweden, the United Kingdom, the Netherlands, Norway, Denmark and Germany. By using existing national, regional and local cycle routes this large partnership has created an uninterrupted cycling path along the coast, with ferry connections as well.

The route was officially opened in 2001 with the support of a partnership involving local and regional authorities, transport carriers, tourist boards and many organisations. 50% of the project was funded by Interreg IIC and the route was further developed under the Interreg IIIB North Sea Programme. The initiatives undertaken include improvements to the route itself, services for cycling tourists, events, and the creation of a new website in 2006.

The aim is to promote trans-national cycling tourism, which is an inexpensive, environmentally friendly source of revenue for North Sea coastal areas.

Source: Authors and InfoRegio ([http://ec.europa.eu/regional\\_policy](http://ec.europa.eu/regional_policy))



## 5. Financial resources

### Key findings

- **Only a small proportion** of SFs is invested in tourism.
- **Mediterranean countries** are the major investors in tourism-related programmes for regional development.
- Attracting private sector funding for tourism projects has been rather difficult for most coastal tourism destinations.
- A key challenge in PPP is finding a sustainable way of **providing private investors with additional sources of revenue**, apart from those generated by ticket sales.
- Public confidence associated **with high visibility and high profile** projects makes it easier to attract private investors.
- **Rural coastal areas** are often disadvantaged in attracting private finance.

### 5.1 Overview

SFs do not invest a major share of their spending in tourism. According to the Fourth Report on Economic and Social Cohesion (see Table 13):

- the tourist sector (strictly defined) received a total amount of 4,720m Euros, equal to 3.6% of the total allocation for Cohesion Policy;
- the Objective 2 regions show the greatest expenditure on tourism (9.5% of total resources);
- the Community Initiatives dedicated over 277m Euros to tourism, equal to 5.2% of the total budget for Cohesion Policy.

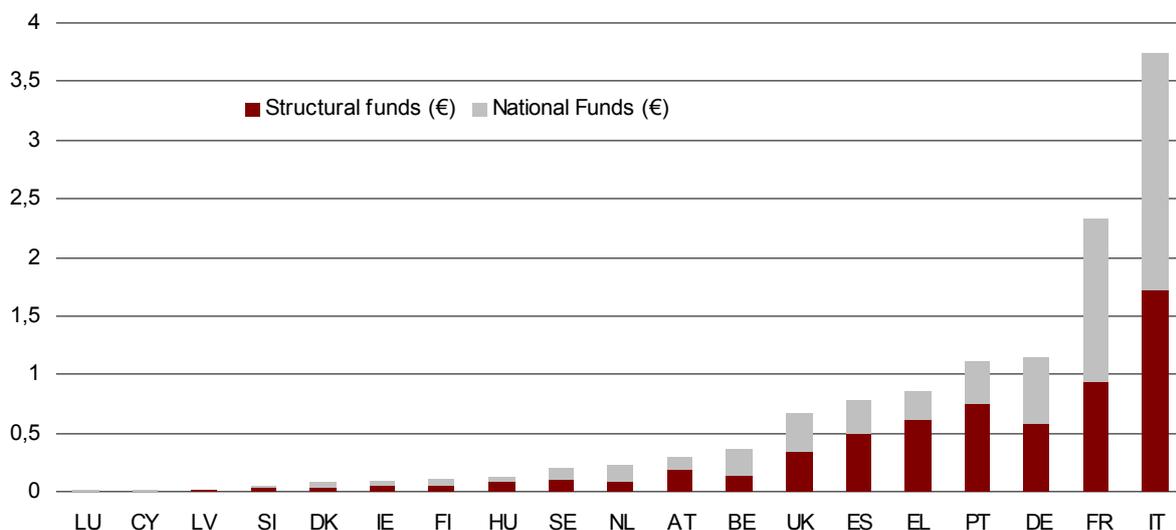
**Table 13. Distribution of Cohesion Policy spending by domain in the EU 25, 2000-2006**

	Ob. 1	Ob. 2	Ob. 3	Community Initiatives
	(%)	(%)	(%)	(%)
Productive Environment	24	56.2	0.6	20.9
<b>- of which: Tourism</b>	<b>3.1</b>	<b>9.5</b>	<b>0.1</b>	<b>5.2</b>
Investment in People	26.5	10.4	97.4	36.8
Basic infrastructure	47.6	29.1	0.4	28.0
Miscellaneous	1.9	4.3	1.6	14.3
Total	100	100	100	100

Source: Authors' data processing of European Commission, 2007, Fourth Report on Cohesion

**Mediterranean countries are the major investors in tourism within regional development programmes** (see Chart 5). Most of the tourism in these countries is indeed coastal tourism.

**Chart 5. Financial allocation to tourism by country and origin of funds (\*), Euros – billions, 2000-2006**



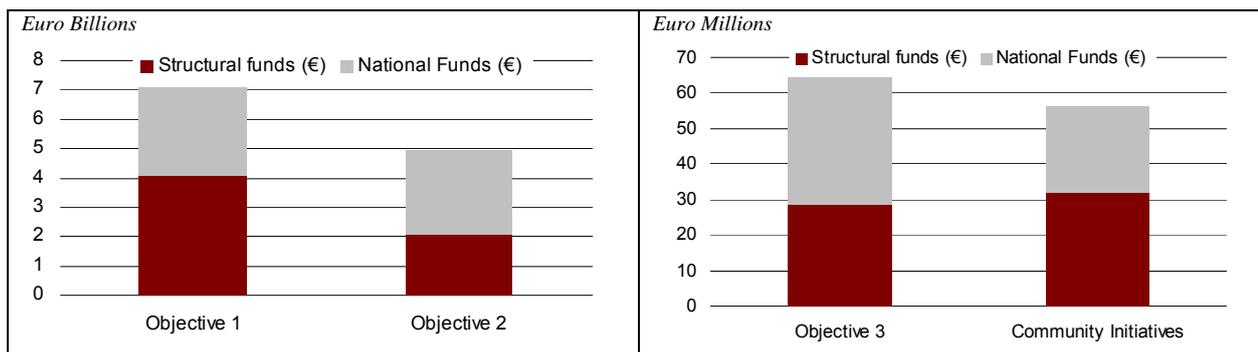
(\* Data are not available for the following countries: Estonia, Lithuania, Malta, Slovak Republic, Czech Republic, Poland.

Source: Authors' processing of DG Regio data

National contributions funded on average the largest share of total project costs in the Objective 2 regions; on the other hand, in Objective 1 regions the SFs had a major role in co-financing tourism projects (see Chart 6).

EU co-financing represents the largest share only in the case of infrastructure projects, which, however, most likely fell within transport and environmental interventions, or on measures of restoring and valorising artistic and cultural heritage. However, this trend is typical of SFs and is not specific to the tourism sector.

**Chart 6. Financial allocation to tourism by Objective and origin of funds, 2000-2006**



Source: Authors' analysis of DG REGIO data

**Participation of the private sector is still not so pronounced.** However, there are examples of good practice, especially in Objective 2 regions, in the case of flagship projects of urban revitalisation and major initiatives for regional marketing. As already mentioned for the overall impact, although making a minor contribution in quantitative financial terms, SFs did contribute to the development of some innovative practices concerning the leverage of private national funds for strategic projects in the tourism sector.

## 5.2 Public-private partnership (PPP)

**Attracting private sector funding in tourism projects has been rather difficult for most localities. Most often in the Objective 2 regions, because of the micro-zoning method,<sup>50</sup> eligible areas have suffered neglect, dereliction and deprivation which would not naturally associate them with tourism.**

The most common attitude of private actors towards public funding is grant-seeking for private investment needs. Typically, in the tourism sector enterprises are mostly SMEs, and this increases the frequency of this attitude. In the case of other stakeholders, the promotion of a specific aspect is the only contribution foreseen in the design of the interventions (for example, environmental associations asking for environment-friendly measures). One problem with partnership with the private sector is usually that commercial companies have different aims, aspirations and standards to the public sector agencies.

It has been noted that in the case of direct support for firms, the selection process for co-financing investment projects was biased towards manufacturing, neglecting service sectors. Furthermore, in the new Member States the participation of private firms has been weak, because of the weak association level of tourist enterprises.

A more strategic approach in this direction requires that efforts are made to encourage private actors to adopt a more proactive role. In particular they can be encouraged to become investors rather than simply beneficiaries of public subsidies. **A key challenge to PPP is finding sustainable and effective ways of providing incentives to private investors: this can be done by having sources of revenue coming from the indirect effects of attracting people, not only tourists, to a place.**

On the other hand, it could be promoted as a support to the overall conditions necessary to make business successful rather than supporting a particular business directly. This can easily be done by means of interventions of urban renovation, territorial marketing and improvement of existing transport and environmental infrastructure, especially in the Convergence regions.

The recommendation here is to concentrate the resources on more large-scale innovative projects, rather than on supplying grants. This is an approach which has proved to be successful in providing good incentives for the participation of private investors in a more long-term perspective. Investment in visibility is also a key point to attract private investors.

## 5.3 Best practice in attracting private investors

**Public confidence associated with the density of the investment and high-visibility and high-profile projects makes it easier to attract private investors. Rural coastal areas may not have the same concentration of public resources, and unlike urban coastal centres they have not been as successful in attracting private finance.**

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<sup>50</sup> In order to cope with the need for concentration of resources, in the period 2000-2006 it was not the whole territory of the Objective 2 regions that was eligible (as it is in the current period), but only a well-identified number of municipalities, selected on the basis of statistical indicators of industrial decline.

When attracting private investors for cultural and tourism projects, efforts can be made to find extra ways to generate revenue in addition to sales of tickets to tourists. In the case of The Deep (Box 12), building high-quality business units for rental, and thus responding to commercial needs within the city, was part of the whole scheme from an early stage; this form of cross-subsidy means that the aquarium is not so reliant on visitor income, which naturally fluctuates, and could therefore set admission charges at reasonable levels while reducing the project’s financial risk and providing job security for staff.

**Box 12. The aquarium The Deep (city of Hull): a successful example of attracting private funds**

An example of good practice in the involvement of private sector funds is The Deep project in Hull. The Deep consists of four elements: a **tourist attraction** housed in an iconic building with one of Europe’s deepest tanks (known as a ‘submarium’); a **business centre**, renting high-quality business units (managed workspaces); a **lifelong learning centre**; and a **research facility** used by the University of Hull’s department of marine studies.

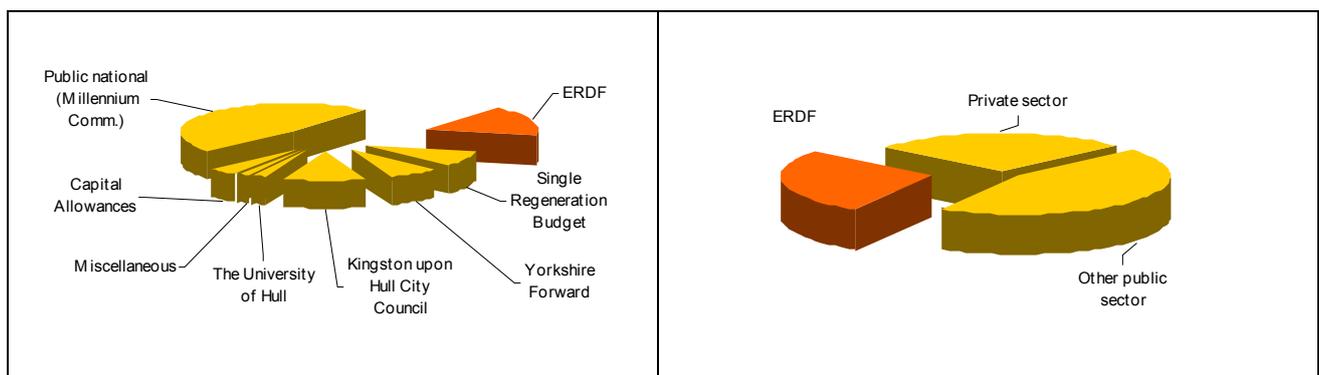
The Deep opened in March 2002, and more recently has been extended due to its success, as it was outgrowing its facilities; so far it has received over two million visitors from the United Kingdom and abroad. The visitor attraction uses a combination of interactive displays, audiovisual presentations and living exhibits. It has a very active education programme, with an average of 20,000 school visits a year, and it employs two full-time teachers. A team of marine biologists looks after the animals, as well as carrying out research into the marine environment.

The Deep was originally expected to attract 250,000 visitors annually. In its first full year, The Deep had 855,657 visitors; after five years the number has now settled down to some 400,000 visitors annually. The most recent annual turnover was €8.2m. The surplus is ploughed back into the business to update and generate exhibition content.

**Source: Authors**

In terms of financial resources, successful projects accessed ERDF funding as one of a number of sources of financing, where public national, public local and private funds shared the responsibilities for, and benefits of, the project. While in the start-up phase, there is a greater need for public funds; a flagship project is able to attract private funds for visibility or extra-tourism purposes (see Chart 7).

**Chart 7. The Deep – funding sources for Phase 1 (left) and Phase 2 (right), 2000-2006**



**Source: The Deep/GOYH Compendium of Objective 2 Projects (2000-2006 ERDF Projects in Yorkshire and The Humber)**

## 6. Revitalisation of local economy

### Key findings

- Generally interventions in coastal tourism **positively affect growth and employment** dynamics.
- The **job creation rate** in tourism is above average compared to the whole European economy.
- Tourism can be seen as a means for the revitalisation of local economies **by absorbing workers** from declining industries to new activities.
- The more the SF mechanism is **integrated into administrative capacity**, the higher is the impact on regional growth.
- Tourism is characterised by a high degree of **part-time/seasonal employment**, flexible working conditions and wages below the average.
- A direct relationship between SFs supporting tourism in coastal regions and women's employment is **impossible to establish**.

### 6.1 Overview

The tourism sector is considered strategic in the framework of the Lisbon Strategy for growth and jobs, given its significance in terms of share of total GDP and employment.

The Commission Communication “A renewed EU Tourism Policy: Towards a stronger partnership for European Tourism”<sup>51</sup> (COM(2006)134) stresses how the employment growth rate in tourism is above the average of other sectors. In the last decade, **the job creation rate in tourism was above average compared to the European economy as whole**: in the 2000-2005 period, for example, the average annual growth rate of people employed in hotels and restaurants (*Nomenclature statistique des activités économiques dans la Communauté européenne*-NACE division 55) was 2.9%.<sup>52</sup> Moreover, tourism can play a crucial role in areas of industrial or rural decline, or areas of urban regeneration.

The decline of the fishing sector in most coastal areas has contributed to a consistent loss of employment with resulting social and economic deprivation. Furthermore, almost everywhere rural coastal areas are facing important demographic challenges, with ageing populations, mostly retired, and youth retention as major issues.

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<sup>51</sup> Communication della Commissione “A renewed EU Tourism Policy: Towards a stronger partnership for European Tourism”<sup>51</sup> (COM(2006) 134) del 17-03-2006

<sup>52</sup> Eurostat, Tourist Statistics 2007 edition

**Tourism in regional development strategies is often seen as a means for the revitalisation of local economies by absorbing workers from declining industries to new activities.** This is particularly relevant considering that one of the major efforts in the tourism sector is to increasingly diversify the range of activities offered to tourists, and also to encourage different kinds of tourism in order to address the seasonality character typical of coastal tourism. The integrated approach emphasised in the SF interventions proved to be very effective in supporting these strategies.

The opportunity offered by creative industries combined with the tourist appeal of an area seems one of the more successful strategies that some coastal areas are pioneering.

## 6.2 Impact on regional growth

**It is too early to speak about the impact of SFs on regional growth in coastal areas for the period 2000-2006. In any case this figure cannot be estimated for coastal tourism on its own.** For instance, the long-running renovation of hotel accommodation has now put Guadeloupe in a more competitive position to attract tourists from all countries, but the outcomes of the projects implemented within the OPs between 2000 and 2006 will only become apparent in the next two years.

In general, the effect of SFs on the growth of coastal economies depends on the features of the regions examined. **In some cases coastal tourism and regional tourism may coincide.** In such regions, the tourism sector is the leading sector and the economic **impact of SFs is highly effective.** This is, for example, the case in the Algarve, where industrial sectors like construction and real estate, commerce and transport, boosted by tourism development, experienced impressive growth. In other cases, coastal tourism represents only a sub-sector within the broader tourism sector, so that SF interventions in coastal tourism are less significant.

The increase in disposable income is a major cause of the boost in coastal tourism demand, and for this reason the positive impact of SFs on a region as a whole could have an indirect positive effect on coastal tourism via the demand side rather than the supply side.

**Good planning and management also affect the SF impact on growth: the more the SF mechanism is integrated into the administrative capacity, the higher is the impact upon regional growth.**

In each region, the local authorities focused EU funds on different targets, depending upon local priorities:

- In order to foster the whole regional economy, in Marche the EU incentives for tourism have been addressed to support new forms of tourism related to the discovery of the cultural and natural heritage of the hinterland, which is facing some macroeconomic problems related to the decline of traditional rural and industrial sectors.
- Guadeloupe concentrated its efforts on the renovation of already existing accommodation infrastructure, providing a set of additional services, such as sports, restaurants, shopping, cultural facilities, transport, etc.
- in Pomorskie, the SFs have been utilised mainly to meet the strategic objectives of the regional Strategy for Development of Tourism through the modernisation of

infrastructure, the development of brands and tourist products, and the improvement of transport. Their common objective is to increase the numbers of days visitors spend in the region.

### 6.3 Impact on regional employment

The EC Communication “A renewed EU Tourism Policy: Towards a stronger partnership for European Tourism” (COM(2006) 134) analyses the factors determining the contribution of tourism to job creation, particularly with regard to women, young people and less skilled workers. Flexible conditions and part-time jobs seem to be constant in the tourism sector; however, the Communication highlights that adequate measures should be introduced to ensure the security of jobs and the development of workers’ skills.

**Generally interventions in coastal tourism positively affect employment dynamics in terms of job creation in the sector.** The evidence from the case studies confirmed this tendency.

In the Marche region, EU support for new private investments and measures for the enlargement and renovation of already existing establishments led to the creation of about 150 new jobs<sup>53</sup>.

In Guadeloupe the impact has been lower, because many hotels were closed for renovation, but was positive, however, recording the creation of 32 jobs in April 2005. The expectations for the next programming period are to create around 800 jobs by the end of 2013.

The creation of new jobs in the tourism sector may contribute to the migration of employers from other sectors in decline. In the cases of Marche and Pomorskie, for example, tourism absorbed employers from the manufacturing, textile, chemistry and fishing sectors, determining a re-allocation of the workforce.

Generally, in the case of regions mostly developed alongside their coastlines and suffering rural and industrial decline inland, coastal tourism may attract workers from the country, exacerbating the phenomenon of social marginalisation and depopulation of less developed areas.

An important issue to be addressed is the nature of the new jobs created by tourism in coastal regions. **On the one hand, tourism development contributes to the reduction of unemployment, but on the other hand, it is characterised by a high degree of part-time/seasonal employment and flexible working conditions.** Young and less skilled people are often those who take the job opportunities of tourism, such as waiters, cooks, barmen, entertainers, promoters, sports instructors, etc. Most of these people do not have fixed term contracts and may be unemployed again out of the season. Also, **wages are usually low**, despite a high number of hours worked per day.

Although the case studies highlighted a general difficulty in defining the nature of the new jobs created because of the lack of field data, evidence is available in some cases. In the Sud-Est region of Romania, for example, 48% of the coastal tourism workforce has only primary education, while only 41% has specific training in tourism, and 79% are seasonal employees. Furthermore, this situation is accentuated by the lack of legislation obliging employers to train

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<sup>53</sup> Annual Implementation report, SPD Marche, 2006.

their employees each year, the lack of a bonus system for firms doing training, and the migration of the workforce for this sector from either within or outside Romania.

In Pomorskie, due to the highly seasonal character of tourism, most employees do not work in tourism in winter, while on the other hand, many employers reported problems in finding staff to hire in summer.

Tourism in the Marche region is also characterised by the seasonality issue, but the evidence highlighted a tendency towards a higher quality of the nature of employment in coastal tourism. In particular, the implementation of innovative projects co-financed by SFs introduced new professionals for new markets. This is the case with the “Adriatic Report” project, aimed at fostering the competitiveness of the Adriatic sea coasts through the creation of an integrated network of ports and seaside linking the Italian and Croatian coasts (see Box 9).

**The issue of quality in tourism employment is an important issue for local decision-makers. To this end, SFs are used also to improve the quality of tourist employment,** as shown in some of our case studies. In the Marche region, for example, in the framework of the above-mentioned Interreg initiative, a survey about professional needs in the tourism sector has been conducted, both in the region and in the partner country, Croatia. Some multi-lateral meetings have been promoted in order to design joint training services. In Pomorskie the lack of qualified staff has been addressed by designing specific training programmes co-financed by the ESF (see Box 13).

The figures available from the case studies illustrate how interventions in coastal tourism may encourage women’s employment. In Marche around two-thirds of the new jobs created (150) have been occupied by women, while in Guadeloupe the ratio is 18 jobs for men to 14 for women. In 2005 in Pomorskie there were 17,515 people employed in hotels and restaurants, of whom 65% were women. However, **a direct relationship between SFs supporting tourism in coastal regions and women employment is impossible to establish,** as the role of national and regional guidance in employment is predominant.

**Box 13. Pomorskie region (Poland). The training programme “*Turystyka wspólna sprawa*” (Tourism – Common Business)**

Due to the emigration of many skilled workers, the tourism sector in Pomorskie experiences a lack of qualified staff necessary to meet the demand for tourism services. One of the ways to overcome this problem is training, designed to improve the human capital of tourist enterprises. The programme “Tourism – common business”, like 8 other large training programmes, is co-financed by ESF resources within OP Development of Human Resources 2004-2006 (measure 2.3. Development of modern economy human resources).

Three types of training are offered:

- i) network cooperation aimed at teaching how to create branded regional and local products, increasing the attractiveness and tourism competitiveness of regions;
- ii) tourism management – offered to managers and owners of tourism enterprises. Training covers areas such as insurance, catering, accountancy etc.;
- iii) language courses (English, French, German, Russian).

Within the programme workers can get 60% ESF co-financing and in case of SMEs 80%. Students working in municipalities and NGOs are taught free of charge. Apart from training, there are also organised tenders for the design of branded tourism products. Over 10,000 workers from the tourism sector in Poland are expected to be trained until the end of the 2004-2006 programming period (which due to n+2 rule lasts till 2008).

The advantages reported are low prices, training in the companies' location, and meeting staff shortcomings.

**Source: Authors**



## 7. Reduction of seasonal effects

### Key findings

- The **diversification of products** and services may contribute to the reduction of seasonal effects.
- Tourism seasonality has been decreasing during recent years due to external factors, such as changes in climate, tourists' tastes and availability of holiday periods throughout the year.
- SF experience shows good practices in finding solutions to reduce seasonal effects.
- Solutions for the diversification of the coastal tourism offer may include: the establishment of links and routes between the coastline and the hinterland; investment in cultural events and activities; the promotion of new forms of tourism such as business tourism and educational tourism; and strengthening the role of leisure activities.

### 7.1 Overview

The promotion of alternative forms of tourism and the diversification of tourism products represent the main concerns faced by all coastal policies and interventions, for many reasons.

**The diversification of tourism products and services can, in fact, contribute to the competitiveness of coastal destinations**, especially when tourists are offered the opportunity to enjoy cultural and natural sites on the coast and in the rural/urban hinterland and diversified sea attractions (diving, health, thalassotherapy, underwater archaeology, etc.).

Furthermore, **the alternative forms of tourism can help to extend the tourism season**, producing multiple benefits, among which are:

- alternative sources of income, creating more growth and employment;
- the reduction of the environmental, economic, social impact and pressure caused by concentrating tourism into a few months of the year;
- the creation of new activities supporting the preservation and development of an area's heritage.

To a certain extent, **the seasonality of tourism has been attenuating during recent years due to some external factors**.

Firstly, climate change is expected to reshape the worldwide tourism industry, to affect tourism destinations, their competitiveness and sustainability, determining a geographical and seasonal redistribution of visitor flows. Climate, in fact, contributes to defining the length and the quality of tourism seasons, and plays a fundamental role in destination choice and tourist spending.

Ironically, this phenomenon may have some positive implications for the tourism industry by extending the summer season in northern European countries and perhaps even opening up new destinations. For example, the Yorkshire and Humber Regional and Spatial Strategy (RSS) in its

overall strategic direction for the region recognises that with climate change, the climate in the region will get warmer, with winters becoming wetter and summers drier, although extreme events such as floods will become more frequent and the rate of coastal erosion is likely to increase; among the implications of climate change are opportunities for greater tourism potential. However, as will be seen later, on balance the effects are mainly negative and would have to be taken into consideration.

Secondly, changes from the demand side are occurring:

- on the one hand, there is a social trend towards shorter and more frequent holiday periods;
- on the other hand, there is an increasing demand for a more developed set of services and entertainment, including sea sports as well as cultural or health activities, which are not strictly linked to the main summer months.

**Seasonality is an intrinsic characteristic of the tourism sector, which has to be addressed with appropriate policies and interventions.**

## 7.2 Solutions for diversification

There are some interesting solutions emerging from the SF experience. One innovative strategy concerns the promotion of an **integrated tourism offer that can link the coastline with the hinterland** and other localities, in order also **to establish a tourism ‘flow’ between different but already existent forms of tourism**. A good example of this is provided by the Marche Region (see Box 14).

### **Box 14. The tourism diversification strategy of the Marche Region The Interreg experience with Croatia developed in the period 2000-2006**

One peculiarity of the Marche region is its position as a “border region”, which directly affects the tourism sector. In fact its coastal tourism has faced growing competition from the other Adriatic regions, in particular from Croatia. The strategy adopted by Marche Region has been based on cooperative efforts with the opposite coastlines, in order to face common challenges and to exploit positive synergies. Within the Interreg “Adriatic Report” Project, an Integrated Offer Plan was developed in collaboration with Croatia, aiming to correlate the individual locations on the Adriatic coasts into a single maritime tourism itinerary, fully integrated from coast to coast. In practice, innovative ways for the discovery of new tourist routes have been promoted, considering not only the attractions of the sea, but also gastronomic itineraries, historical and architectural sites and nature trails, involving the surrounding hinterland. The Adriatic Sea basin is thus considered the crucial tourist resource for the development of both the Italian and Croatian littoral zones which, by means of their new strategic cooperation, should be able to increase the attractiveness and usability of the whole area.

**Source: Authors**

In some cases, SFs were used to invest in heritage and **cultural tourism** as a way to:

- differentiate the tourism offer in coastal towns which have historically performed an industrial function (making use of the historic fabrics and linking them to the creative industries);
- re-shape the identity and the distinctiveness of the area, transforming the coastal resorts into heritage seaside towns.

In this way, acquiring new ‘brands’ and entering new markets, coastal towns move from traditional seaside resort roles to ‘specialist roles.’

Such an approach has been pursued with success, for example, in the English towns of Whitby and Scarborough (see Box 15).

**Box 15. Investing in cultural heritage: the examples of Scarborough (UK) and Rotterdam (Netherlands)**

**Scarborough**, a maritime centre with a history of shipbuilding, a 19<sup>th</sup>-century resort for the wealthy and one of Britain’s first seaside resorts, saw a great investment in architectural heritage and cultural assets during its heyday. However, in common with many seaside towns Scarborough’s popularity as a resort waned in the latter half of the 20th century, and its rather remote location made it difficult to attract new enterprise. In its strategy Scarborough Borough Council is supporting a sustained effort to invest in Scarborough’s architectural heritage and its cultural assets. Whilst on the one hand attempting to tackle social deprivation and low educational attainment levels that have set in, the council and more recently Yorkshire Forward, the Regional Development Agency for Yorkshire and the Humber, are investing substantially through the Scarborough Urban Renaissance initiative to transform the town. A cluster of initiatives and strategies has been devised and put into action designed to restore architectural assets (Scarborough’s Grand Hotel), improve, transform and reconnect the city’s heritage (e.g. the Rotunda Museum, Scarborough Marina) and transform historic landmarks to create new areas of activity (e.g. Scarborough’s historic Spa complex to be re-used as a conferencing centre).

The city of **Rotterdam**, with 600,000 inhabitants, is the Netherlands’ foremost industrial centre, with the greatest commercial port in the world representing one of the principal points of entry to the Union. Although extremely important and active from a commercial and industrial point of view, the city has a lack of attractions which reduces its opportunity to become a coastal tourism destination. Against this background, the municipality has during the previous programming period allocated significant investments to improve the attractiveness of the city. In particular, the interventions were addressed to:

- the refurbishment of the Prinses Theatre: now offering a variety of cabarets, shows and plays, in addition to activities for all ages, such as singing and poetry;
- the institution and/or renewal of several museums.

These investments, combined with a makeover of the shopping streets, have fostered the attractiveness of the city, which was selected as the European City of Culture in 2002.

**Source: Authors/EC, DG Regio, Structural policies and European territory: Island and coastal regions, 2001**

There is a further possibility for diversification in the promotion of two additional alternative forms of tourism: **“business tourism” (aimed at a customer base of those who attend conferences, conventions, exhibitions and trade fairs) and “educational tourism” (aimed at scholars and students).**

With regard to business tourism, nowadays (by contrast with the past) business travellers have higher expectations of services and accommodation, which require specialised responses from a region and the accommodation infrastructure. The choice of conference or trade destination is, in fact, subordinated to the specialisation and differentiation of the services offered by the whole territorial area (see Box 16). The business tourism market has progressively involved an increasing number of accommodation providers, for two main reasons:

- high-expenditure propensity;
- capacity to ensure a good level of employment, distributed throughout the year.

**Box 16. The impact of business tourism on the economy of the city of Rimini (Emilia Romagna region, Italy)**

For 20 years the business tourism market has represented an important economic resource for the Emilia Romagna region, due to large congresses and trade fairs (for example in Bologna and Rimini) and to a rated system of accommodation.

Focusing only on the city of Rimini, conference tourism has generated since the 1980s (with the creation of the large “PalaCongressi” conference centre) a strong and growing economic base, not only for local tourism enterprises, but also for all the industrial sectors of the municipality. This conference and exhibition centre stimulated the public and private sectors to develop an integrated network of services linked to the organisation and management of events (from transport and therapeutic services to commercial, cultural and leisure activities) and favoured the construction of accommodation. Since 2001, when the Rimini Fair moved into the new fair and congressional area, “PalaCongressi” has quadrupled its capacity, specialising solely in the hosting of major exhibitions, trade fairs and congresses.

“PalaCongressi” and the Rimini Fair benefited by being located in an area particularly developed in terms of accommodation and linked services.

**Source: Municipality of Rimini.**

Educational tourism represents a growing part of the tourism industry as well, and shows good possibilities for further development.

The public aquarium The Deep, supported by SFs in the Yorkshire and the Humber, can be considered an example of best practice in fostering both forms of tourism (see Boxes 8 and 10).

Finally, in the regions characterised by a core tourism business traditionally based on “sun, sea and sand”, efforts can be put into **the development of the product into a more sophisticated offer, including a variety of value-added leisure activities, such as sports, health and spas, golf, nautical tourism, tourism for older people, theme parks, meetings, conferences, etc.** The Algarve region provides a good example of how national and regional authorities are involved in exploiting SF opportunities to diversify the traditional tourism offer (see Box 17).

**Box 17. Solutions for diversification: the cases of Algarve, Majorca and Rhodes****Investing in leisure activities other than the “sun, sea and sand” product: the case of Algarve**

The renewal and revitalisation of coastal areas was a priority under the Algarve Regional Operating Programme 2000-2006. Beach revitalisation and access improvements were combined with private investment in beach bars and other facilities. In addition, several port interventions, such as at Albufeira, Olhão, Culatra, Santa Luzia, Cabanas and Fuzeta, were part of a general plan to revitalise fishing and marine leisure activities in the Algarve. However, the impact of SFs could have been much more relevant to the promotion of other tourism and leisure activities apart from the “sun, sea and sand” product in the period 2000-2006.

Aware of the opportunities offered by SFs and the need to face the seasonality issue, the public authorities have set new objectives and priorities for the Algarve’s development in the next years. For 2015, the Portuguese National Strategic Plan of Tourism (PENT) has the main ambition of attracting 20 million tourists, through tourism activities representing 15% of GDP and 15% of employment. To achieve this purpose, the Region of Algarve has an important role in the upgrading and diversification of its tourism portfolio.

Following the goal of PENT, the Regional Spatial Strategy for the Algarve (PROTAL) focuses regional development on three axes: the territory, the economy and the environment. The strategic options of the PROTAL are to:

- Create the conditions for upgrading and diversification of tourism activity;
- Generate higher levels of environmental protection;
- Improve public spaces and the landscape;
- Structure the urban system, becoming more competitive and territorially balanced;
- Promote the diversification of the economy and the emergence of the knowledge society;
- Gain a higher international profile and new roles in the national and European contexts;
- Develop territorial cohesion and balance.

In the tourism sector, these targets can be achieved by:

- Revitalisation of the Algarve’s economy, increasing the value added of the tourism/leisure cluster;
- Developing advanced services to export in matching sub-sectors of tourism (e.g. health and sports);
- Harmonising the region, preserving public spaces and the landscape, restricting urban pressure in coastal areas and promoting the spaces of the countryside;
- Promoting the environmental quality of the coastal areas.

**Creating an inland alternative:**

Every year almost a quarter of Spanish tourists visit Majorca for holidays. For a long time tourism was concentrated only on the coasts of the island. With the support of ERDF, rural and inland tourism started to develop: old houses in the countryside were transformed into tourist accommodation. This exploitation of old houses contributed both to avoiding the exodus of the rural population caused by the crisis in agriculture, and to guarantee a balanced development among the coastal and inland areas. At the present time Majorca has dozens of manors which offer the opportunity to spend holidays surrounded by nature, living in villages and discovering the many cultural traditions of the island.

**Preserving inland attractions: the Valley of Butterflies on the island of Rhodes**

The famous Valley of Butterflies on the island of Rhodes attracts 200,000 visitors each year. However, from year to year, the population of butterflies was gradually declining, mainly because of the noise disturbance by tourists. With the support of the EU, a partnership of nature conservation organisations, scientists and the local and national authorities took action in order to save this delicate environment. Another threat for the butterflies is the lack of water, so the first intervention consisted of installing reservoirs to replenish the water whenever necessary. Secondly, the flow of visitors was regulated by redesigning the paths providing access to the valley. Finally, tourists receive practical information in order to contribute to the preservation the valley. The outcome of ENVIREG project was not only the restoration of the butterfly population, but also the protection of this tourist attraction, which is an important source of revenue in the inland area of the island.

**Source:** Authors and InfoRegio ([http://ec.europa.eu/regional\\_policy](http://ec.europa.eu/regional_policy))



## 8. Contribution to sustainable development goals

### Key findings

- Investment on infrastructure and the development of facilities for tourism purposes may have **negative effects on the environment**.
- Tourism may be a means to **raise environmental awareness** and to **encourage environmental protection measures**.
- **SFs positively contributed** to linking coastal tourism interventions to the objectives of sustainable development.
- The most significant threat for islands and coastal destinations is represented by the reshaping of tourism demand due to **climate-induced environmental changes**.

### 8.1 Overview

**Tourism may** have a varied impact on sustainable development, since it can contribute positively to socio-economic and cultural achievement, and at the same time can **affect the degradation of the environment and the loss of local identity**.

The quality of the environment, both natural and man-made, is essential to tourism. However, tourism's relationship with the environment is complex. It involves many activities that can have adverse environmental effects. Many of these impacts are linked with the construction of **general infrastructure such as roads and airports**, and of **tourism facilities**, including resorts, hotels, restaurants, shops, golf courses and marinas. The negative impacts of tourism development can gradually destroy the environmental resources on which it depends.

In general, coastal areas are the first environments to experience the detrimental impacts of tourism due to the growing pressure of economic activity on the coastline.

According to the UNWTO definition, the *load capacity* of a tourist destination is the maximum number of people that can visit it in the same period without compromising its natural and cultural heritage. To be able to identify such a threshold is fundamental to developing tourism policies consistent with sustainable development requirements. In this regard, **SFs have contributed considerably to the diffusion of the objectives of sustainable development in regional planning** (see Box 18).

**Box 18. Marche Region: tourism flows and environmental impact**

The Interreg initiative “A.S.T.A” (Action for Sustainable Tourism in the Adriatic area) clearly copes with the environmental sustainability issue, by means of a shared methodology aimed at regulating, in an appropriate way, tourist flows and environmental impact. The project, activated in September 2005, involved: the Environmental Authority of Marche Region, the Marche Tourism Service, representatives of the municipality of Valona (Albania) and the Regional Activity Centre of Spalato (Croatia). The institutional actors decided to adopt the EMAS certification system, one of the instruments used by the manufacturing sectors for the reduction of their environmental impact. After the identification of the tourist areas with environmental impact problems due to the strong tourism flows, an environmental policy was developed, including sustainability objectives and the relative targets for each area to reach. The Regional Activity Centre developed a standardised methodology for the calculation of tourism carrying capacity, and guaranteed the integration between EMAS certification and sustainability indicators.

**Source: Authors**

On the other hand, **tourism can have also the potential to create beneficial effects on the environment by contributing to environmental protection and conservation** (see Box 19). It is a way to raise awareness of environmental values and it can serve as a tool to finance protection of natural areas and increase their economic importance.

Setting the sustainable development issue as a general priority across the board, the SFs have positively contributed to raising environmental awareness.

**Box 19. Supporting and preserving natural values: the cases of Pomorskie and Guadeloupe (measure 6.4, OP 2007-2013).**

**Pomorskie Regional Operational Programme (Poland):**

Pomorskie is one of the most distinctive regions of Poland in terms of both natural and landscape values. There are 2 national parks (Slowinski National Park and National Park *Bory Tucholskie*), 118 nature reserves, 9 landscape parks and many other protected areas, covering over 33% of the whole region.

Due to potential conflicts between nature protection and population pressure, the development of mass tourism is limited because there are barriers to extensively increasing the land area available for tourism. Therefore there is a need to change that apparent “weakness” into an opportunity for exploitation, encouraging tourists to link the 3S offer with nature and wildlife.

This strategy encourages the support and sustainable utilisation of naturally valuable areas for tourism together with promotional activities and environmental education (education routes, bicycle routes, parking places, etc).

**Guadeloupe Regional Operational Programme (Guadeloupe):**

Guadeloupe is considered one of the world’s 25 most important sites in terms of biodiversity. Tourism is the main resource of the island, which faced different phases of rapid growth in this sector, with consequences for environmental balance. Coastal areas in particular have been under significant pressure because of urbanisation, the development of leisure activities for tourists, and changes in natural landscapes.

Even if the sustainable development issue was not at the top of the agenda in the 2000-2006 OP, SFs stimulated tourism development in a sustainable way by promoting an environmentally friendly approach towards tourism. SF financed the creation of a team of environmental tourism professionals who attended training in environmental management in order to deal with the scarcity of land, water and power in the island. SFs supported also other initiatives such as the creation of sea and land reserves, and the restoration of well-balanced tourist areas. Moreover, the National Park of Guadeloupe was included in the partnership responsible for the programming and implementation phases of the 2000-2006 OP. Such initiatives may be considered the first important steps towards promoting sustainable development of the tourism sector in Guadeloupe in the 2007-2013 OP.

**Waste management in water desalination in Andalusia, Spain.**

The Province of Almería is one of the driest areas in continental Europe with an annual rainfall of around 200 mm. It is also an area with the highest concentration of intensive agriculture production. Surface water is a particularly scarce resource in Almería and intensive over-exploitation of underground waters along the coast has led to the salinisation of the principal aquifers. An important initiative from the Spanish Ministry of the Environment and the Autonomous Government of Andalusia has been the development of desalination infrastructures along the driest areas of Almería's coast. One example is the Carbonera's Desalination Plant.

With a budget of 254m Euros (co-financed by EU Regional funds, ACUSUR-Spanish Ministry of the Environment and local farmers), it is able to produce 120,000 cubic metres of drinking water per day. The water is used by 200,000 inhabitants living in the coastal municipalities of Almería for drinking, tourism activities, intensive greenhouse agriculture, and supporting the maintenance of local industries. Brine (waste from the desalination process) is mixed with waste water from the neighbouring energy power plant's cooling system. The salt concentration is significantly reduced and therefore the resulting impact on coastal waters is considerably low. The Andalusian Ministry of the Environment periodically controls the salty spills in order to maintain the status of the coastal biodiversity and protect the Cabo de Gata Natural Park's waters.

**Source: Authors; EEA Report No 6/2006.**

## 8.2 Climate change

**Tourism can be generally considered a highly climate-sensitive economic sector similar to agriculture, insurance, energy and transportation.** This assumption is particularly related to bathing tourism, which, since its origin, has been closely connected to climate conditions.

The most urgent effects of **global warming** have been identified by the Intergovernmental Panel on Climate Change (IPCC), and these are connected to:

- higher maximum temperatures;
- an increasing number of hot days during the year;
- more severe tropical storms with higher wind speeds;
- more intense rains;
- more severe droughts.

In addition to this, climate-induced environmental changes have to be considered. Changes in water availability, reduced aesthetic appeal of landscapes, biodiversity loss, altered agricultural production, coastal erosion and inundation, increased natural hazards, damage to infrastructure, and the increasing incidence of vector-borne diseases will all impact upon tourism to differing degrees.

**Island and coastal destinations are particularly sensitive to climate-induced environmental changes.** Beach resorts have already seen erosion caused by intense storms, as well as algal blooms and infestation by jellyfish due to warmer sea temperatures. Small islands and low-lying coastal areas are the greatest risk from rises in sea level, caused by melting polar ice caps. Scientists disagree on how much the sea will rise but it could be up to 1m by the end of this century. For small islands, sites like Venice, or many beaches, there is the possibility that they will be completely submerged.

**This reshaping of tourist choice and behaviour can be considered the most important threat for nature-based destinations such as islands and coastal areas.** For example, tourists from Northern Europe, who are generally the main participants in international travel, are expected to spend more and more time in their home country or nearby, trying to take advantage of the new climatic opportunities, instead of choosing Mediterranean holiday destinations. The problem is also connected to misinformation about the impacts of climate change on tourism destinations, which greatly influences tourists' actions.

The World Tourism Organisation proposes a balanced approach (Box 20) based on the **principles of mitigation** (i.e. actions reducing factors that contribute towards climate change and thus alleviating its effects) **and adaptation** (i.e. taking the necessary steps to cope with the consequences of climate change).

**Box 20. The climate change impact: the UNWTO proposals**

In order to manage the threats connected to climate change UNWTO (World Tourism Organisation), during the *Second International Conference on Climate Change and Tourism* (Davos, 1-3 October 2007), identified two solutions: mitigation and adaptation.

The first means that public and private operators have to reduce greenhouse gas emission by technological, economic and socio-cultural changes. The mitigation strategies suggested are: reducing energy use, improving energy efficiency, using renewable energy sources, and offsetting carbon emissions. The second solution is especially relevant to the tourism offer, and takes into account changes in potential tourists' preferences. They are expected to demand more climate-friendly and climate-proof holiday alternatives. Operators have to begin developing low-carbon tourism products, and destinations need to further diversify their tourism products by offering a variety of indoor and outdoor activities, avoiding the vagaries of weather.

**Source: Second International Conference on Climate Change and Tourism , Davos, 1-3 Oct. 2007**

It is quite clear that climate change, due to the global nature of the factors that interrelate and contribute towards it, cannot be prevented or managed by one policy instrument alone or by actions within one Member State alone, but it rather represents a more overall challenge. It is for this reason that public policies focusing on climate change are better addressed at national level. However, the SF experience can provide good examples of interventions, both in the old and new Member States, in the light of the most common recommendations put forward worldwide (see Box 21).

**Box 21. SFs and environmental protection in old and new Member States: the Romanian and the Yorkshire and the Humber cases.**

Yorkshire and the Humber	Romania
<p><b><i>The North York Moors Sustainable Tourism Project (STP): a “mitigation” example</i></b>                      The project was supported by ERDF between October 2002 and December 2004. It was aimed at developing and promoting tourism across the area in a sustainable way that would ensure benefits for the local economy, the environment and local residents. One of the main strands of the project encouraged and enabled visitors to explore the North York Moors national park by using more sustainable methods of transport (foot, bicycle, horseback etc.), minimising usage of cars and the environmental footprint. The project improved and created over 460 km of cycle routes (especially the Moor to Sea cycle route that connects the coastal park to Scarborough, Whitby and Pickering). A factor of success was the setting up of networks dedicated to the STP project: over 40 local businesses signed a Sustainable Tourism Commitment, whose impact and influence extended beyond the end of the project.</p> <p><b><i>“Scarborough Marina”: an “adaptation” example</i></b>                      In the case of Scarborough, ERDF grants were used in the development of the Scarborough Marina (including a pontoon marina for yachts and leisure craft) and a sea defence wall. The one-metre-high concrete sea wall was constructed in 2005 to replace the original Victorian-era iron railings along Marine Drive, as part of a two-kilometre scheme designed to:</p> <ul style="list-style-type: none"> <li>– protect the resort;</li> <li>– provide more adequate sea defences in view of rising sea levels and greater storm surges;</li> <li>– safeguard the historic 100-year-old Marine Drive, which was at risk from heavy seas.</li> </ul>	<p><b><i>The coastal protection and rehabilitation project in Mamaia South and Eforie North</i></b>                      In Romania, risk protection also extends to coastal erosion, the main environmental problem of the Romanian coast. In the last 35 years, the average rate of coastal erosion has reached 80 ha/year.</p> <p>In 2007, in cooperation with the Japanese Agency for International Cooperation, the Romanian Government implemented the “Protection and Rehabilitation Study of the South Part of the Romanian Black Sea Coast”. The project consisted of the commissioning of feasibility studies for two interventions that are going to be financed by SFs: “Protection and Rehabilitation of the coast in the South area of Mamaia resort”, and “Rehabilitation and Protection of the coast in Eforie Nord”. According to the feasibility studies, in the absence of these projects, the south part of the Black Sea coast could lose 82,000 sq m in the South Mamaia area and 10,000 sq m in the North Eforie area. This could seriously affect not only the natural habitat of the area, but also the economic and social development of the Black Sea coastal area.</p> <p>The two interventions are going to contribute to the prevention of coastal erosion and to the rehabilitation of the south part of the Romanian Black Sea coast: in fact, the project is expected to increase the beaches’ surface by almost 156,000 sq m during the implementation period.</p>

Source: Authors

## 9. Conclusions

### 9.1 General conclusions

The overall conclusion of the study is that **while the tourism industry cuts across different sectors of activities, the planning and implementation approach of interventions in tourism is still linked to too narrow a concept of mass tourism**, well embodied in the Mediterranean 3S (sun, sea and sand) model.

As a consequence, public funding for tourism is generally seen as a tool to improve the local supply of accommodation and basic tourism infrastructures. Recent trends in the industry, however, demonstrate that this approach is too limited to cope with the challenges that the industry, particularly in its mass model of development, is likely to deal with in the near future. **The SF interventions proved to be a good policy framework where some progress was made in moving towards a more integrated and mature approach** to the promotion of coastal destinations.

To sum up all the evidence collected from the literature review and the analysis of the case studies, the following can be highlighted:

- 1) **Some of the main challenges facing the coastal tourism sector are the following: its seasonal character, an increasing need for sustainable development measures, and an increasing demand for diversified leisure activities.** Consistently common objectives in coastal interventions for regional development are to lengthen the numbers of days spent in the region by differentiating the tourism offer, connecting the coast with the hinterland as part of the offer, and promoting forms of tourism more sustainable than the more traditional mass tourism based on bathing.
- 2) In the context of European Cohesion Policy, SFs, **specifically the measures within the ROP co-financed by ERDF, largely supported interventions in coastal tourism.** A wide range of initiatives were put in place: public infrastructures, grant schemes for tourism SMEs, territorial marketing and promotional activities.
- 3) Although it is not straightforward to assess the impacts of those initiatives on regional development due to the cross-cutting nature of the tourism sector, it is evident that while a minor impact can be perceived in quantitative terms (tourism is not a priority within the Cohesion Policy framework), **there is a clear impact in qualitative terms as far as institutional and capacity building are concerned.** The SFs stimulated involvement in partnership, even though this was to different degrees across all the projects, and contributed to the improvement of the quality of programming and project design.
- 4) **The major contribution of SFs is the shift to a more integrated approach to coastal quality management.** The interventions did not focus only on tourism features but took other aspects into account. The most important is environmental protection, especially in relationship to coastal erosion and biodiversity.

Much is still to be done to develop integrated strategies within **coastal tourism management and planning** to support tourism in a sustainable way. However, the experience of the SF programmes provides good examples of what can be achieved.

## 9.2 Specific conclusions

### 9.2.1 Implementation of partnership principle

The implementation of the partnership principle has proven to be a significant achievement in coastal tourism interventions: a raised awareness of the importance of having a broad set of stakeholders and experts has been observed, especially in the new Member States.

**The partnership principle has been embodied widely** in the old Member States as a natural component of both programming and project design. In the case of cross-border cooperation, the EU Community Initiative (Interreg) allowed the establishment of a multinational partnership. In the new Member States, the SF Regulations try to encourage building partnerships, but there is still room for improvement.

In particular, evidence shows that while the involvement of the business sector, environmental associations and local stakeholders is quite common in the design and planning phases, there is still a lack of systematic involvement in the implementation phase of intervention. Only in minor cases are sector experts, the scientific community and representatives of all sea-related activities (productive or leisure) included in the partnerships.

### 9.2.2 Financial leverage effect

SFs do not invest a large amount of resources in tourism, so **in quantitative terms the financial impact of SFs is not very significant. In terms of financial leverage, the largest share of co-funding at national level is provided by national public funds (regional and local)**, rather than the private sector. The attitude of the private sector is mainly one of grant-seeking, and **PPP experiences are rather episodic**.

However, when innovative and highly visible flagship project are promoted, and opportunities are created for obtaining revenues for activities related to the attractiveness of a place (not only for tourism purposes but also business and educational, for example), there is room for the involvement of private investors.

### 9.2.3 Revitalisation of local economy

The mid-term evaluations in a number of Member States found that tourism projects were effective in expanding regional income.

In some regions the coastal tourism sector is the main economic sector, in terms of employment. This is particularly the case for small islands and the Outermost regions. **When tourism is a significant source of income in the regional economy, an important role can be played by public support for tourist attractions for the revitalisation of local economy**. However, in those regions, the sustainability issue should be the priority, in order to avoid an over-exploitation of the natural assets.

In other cases SF interventions helped to absorb unemployed people from declining industries. In these cases the problem of employment quality (seasonal, part-time, unqualified jobs) should be tackled.

### 9.2.4 Reduction of seasonal effects

Different models of coastal tourism exist in Europe. Besides the most common Mediterranean one, interesting experiences in reducing or coping with the seasonal nature of coastal tourism are found in the those destinations where, for climatic reasons, the 3S model cannot be considered a successful strategy.

In these areas, **SF interventions provided some examples of how to support a differentiated range of services**, including sea sports (diving, windsurfing, kite-surfing, etc.) as well as cultural or health activities related to the valorisation of the sea as an asset. Business tourism and educational tourism proved to be two good alternatives.

### 9.2.5 Climate change and sustainable development

The environmental impacts of tourist activities are a major concern for coastal areas most interested in mass tourism. Mainstreaming the environmental sustainability issue in all the SF interventions proved to be an effective way to implement tourism intervention aimed at preserving natural assets. A **shift from viewing natural assets as a constraint to regarding them as a means to make destinations more attractive** has also been influenced by SF requirements.

As for climate change issues, while they are of course of relevance and importance to coastal areas, they are better addressed within macro EU or national policies rather than regional SF interventions.



## 10. Recommendations

From these main findings it is possible to provide some recommendations for the next programming period (2007-2013).

In the light of the conclusions drawn in the present study, the European Parliament's Committee on Regional Development is recommended to **take action to encourage all EU policies to be responsive to their indirect impacts on the long-term attractiveness of coastal destinations**. Maritime and environmental policies are the major policy areas where this awareness should be raised, and a major integration of these policies with SF interventions should be promoted.

Moreover, the Committee is recommended to endorse specific strategies of the EU Commission and the Member States as listed below.

### 10.1 Recommendations for the European Commission

The need for integration of policies at EU level is the main area which should be addressed by the European Commission. More specifically, it is urged to:

- **Integrate coastal tourism SF interventions within the other EU policies**, in particular the Maritime Policy and the ICZM strategy, but also the TEN-T and Environmental policies (Natura 2000). Environmental sustainability should be promoted as the driving principle in SF interventions for coastal areas, and proper evaluation activities should be put in place to verify the application of these basic principles.
- **Catalyse EU policies for coastal areas through an integrated approach**. The projects promoted and financed in coastal areas, in different sectors and areas of intervention, should embody an integrated approach in terms of financial resources (public-private, local-national-EU), policy sectors (local development, spatial planning, sustainable development, innovation), and actors (PPP). Tourism can be, in coastal areas, the catalysing driver which provides the vision for future local community development.

### 10.2 Recommendations for Member States and coastal regions

Tourism promotion is mainly financed at national and regional level. For this reason national and regional stakeholders have the most significant role to play in fostering sustainable tourism development in coastal regions. More specifically, national and regional policy-makers are encouraged to:

- **Support a change from “place-making”<sup>54</sup> to “place-shaping”<sup>55</sup>**. The nature and

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<sup>54</sup> “Place-making” refers to an integrated approach to spatial development to create more ‘liveable’ towns and cities; it is an integral part of the Sustainable Communities approach and the Bristol Accord, where it is described as “an integrated approach to territorial cohesion” (Office of the Deputy Prime Minister, UK (2006), UK Presidency: EU Ministerial Informal on Sustainable Communities. Policy Papers, March 2006, p.33).

<sup>55</sup> The concept first appeared in the UK Lyons inquiry, *Place-Shaping: A Shared Ambition for the Future of Local Government* (2007), which considers the role of local government in wider local participative decision-making beyond the traditional models of service provider and vehicle for investment in the public infrastructure. Place-making through “place-shaping” underlines the importance of communities taking responsibility for their own economic fortunes, and for striking the right balance between economic, environmental and social objectives and concerns.

([www.official-documents.gov.uk/document/other/9780119898552/9780119898552.pdf](http://www.official-documents.gov.uk/document/other/9780119898552/9780119898552.pdf))

length of decline suffered by coastal regions, in both C&E and Convergence regions, means that investment in ‘bricks and mortar’, i.e. purely physical investment in place-making initiatives, is not what is required. Localities, mainly in the old Member States, in the Mediterranean, Atlantic and North Sea regions have had to rebrand themselves and change the way they are perceived, referred to here as “place-shaping” activity. The following aspects of this are extremely important:

- Investing in integrated tourism packages promoting regional territories with a more holistic approach, complementing traditional seaside attractions with other, less well-known, attractions in the region;
  - investing in a heritage-based approach as a tool for renewing distinctiveness, character and identity in coastal areas, and differentiating the tourism offer from coastal resorts to heritage seaside towns;
  - investing in architectural distinctiveness and high quality design to achieve place-shaping and the changing of perception for flagship coastal projects;
  - investing in cultural-themed tourism as a way to differentiate the tourism offer in towns and settlements that have historically performed an industrial function.
- **Shift perspective from continental to global tourism competition.** European tourist areas already face growing competition from newer European destinations which have a comparative advantage in terms of cost. The dimensions of competition call for a wider integration among European states in order to build competitive packages that cross national borders. In order to promote and sustain this integration, the new “European Territorial Cooperation” Objective will have a crucial role, especially in fostering cross-border projects.
  - **Strengthen the link between coastal tourism and environmental protection.** Coastal tourism and sustainable development are mutually interconnected. Tourism can represent as much of a threat as an opportunity for the environment. EU SF interventions should positively link these two themes, not only for the C&E objective, where there is a specific legal provision, but also for the Convergence Objective.
  - **Provide credibility for PPP.** Potential in partnership delivery is strongly influenced by the nature of intervention. Attracting private sector funding in tourism projects is extremely important. In order to build public confidence it is necessary to deliver projects which have a high financial density of public investment, high visibility and high profile.
  - **Empower human resources.** Not only do ERDF and EFF play a role in supporting coastal tourism, but the ESF does also. Acquiring highly skilled workers to deal with the growing complexity and variety of the tourism market is now a crucial challenge for coastal regions. This aspect also has implications for gender issues.

## Annexes

### Annex 1.

Tab. 9 - Employment in Hotels and Restaurants on Total employment, 2004

Countries	Regions (*)	Employment in hotel and restaurant/Total Employment (%)
ES	Illes Balears	20.2
GR	Ionia Nisia	18.8
GR	Notio Aigaio	18.6
PT	Algarve	18.0
ES	Canarias	13.5
GR	Kriti	12.2
PT	Região Autónoma da Madeira	10.8
Cyprus	Cyprus	10.5
ES	Cantabria	8.6
Malta	Malta	7.9
GR	Voreio Aigaio	7.1
IT	Liguria	7.0
GR	Dytiki Elláda	6.8
PT	Alentejo	6.7
ES	Cataluña	6.7
ES	Andalucía	6.5
IE	Border, Midland and Western	6.5
PT	Lisboa	6.3
GR	Anatoliki Makedonia, Thraki	6.3
GR	Ipeiros	6.1
GR	Stereia Elláda	6.0
ES	País Vasco	6.0
ES	Comunidad Valenciana	6.0
IT	Toscana	5.9
GR	Thessalia	5.9
PT	Região Autónoma dos Açores	5.9
ES	Principado de Asturias	5.9
IE	Southern and Eastern	5.8
IT	Friuli-Venezia Giulia	5.5
ES	Galicia	5.4
IT	Veneto	5.4
GR	Peloponnisos	5.4
IT	Emilia-Romagna	5.2
FR	Corse	5.1
GR	Kentriki Makedonia	5.0
IT	Sardegna	5.0
ES	Ciudad Autónoma de Ceuta	4.7
IT	Lazio	4.7

Countries	Regions (*)	Employment in hotel and restaurant/Total Employment (%)
FR	Provence-Alpes-Côte d'Azur	4.7
NL	Zeeland	4.7
BE	Prov. West-Vlaanderen	4.6
BG	Severoiztochen	4.6
UK	Tees Valley and Durham	4.4
UK	Northumberland	4.4
UK	Tyne and Wear	4.4
UK	Lincolnshire	4.4
UK	North Yorkshire	4.4
UK	East Anglia	4.4
UK	Essex	4.4
UK	Kent	4.4
UK	North Eastern Scotland	4.4
UK	Eastern Scotland	4.4
UK	East Riding and North Lincolnshire	4.4
UK	Cumbria	4.4
UK	Cheshire	4.4
UK	Lancashire	4.4
UK	Merseyside	4.4
UK	Surrey	4.4
UK	East and West Sussex	4.4
UK	Hampshire and the Isle of Wight	4.4
UK	Gloucestershire	4.4
UK	Dorset and Somerset	4.4
UK	Devon	4.4
UK	Cornwall and Isles of Scilly	4.4
UK	West Wales and the Valleys	4.4
UK	Western Scotland	4.4
UK	Highlands and Islands	4.4
UK	Herefordshire, Worcestershire and Warwickshire	4.4
UK	Northern Ireland	4.4
GR	Attiki	4.4
PT	Norte	4.3
ES	Región de Murcia	4.3
ES	Ciudad Autónoma de Melilla	4.3
PT	Centro (PT)	4.3
FR	Languedoc-Roussillon	4.1
IT	Marche	4.0
IT	Abruzzo	4.0
BG	Yugoiztochen	3.9
IT	Campania	3.8
IT	Molise	3.8
SE	Stockholm	3.7

Countries	Regions (*)	Employment in hotel and restaurant/Total Employment (%)
NL	Noord-Holland	3.7
FI	Åland	3.6
FI	Etelä-Suomi	3.4
DE	Mecklenburg-Vorpommern	3.4
DE	Bremen	3.4
DE	Lunenburg	3.4
DE	Weser-Ems	3.4
DE	Schleswig-Holstein	3.4
PL	Zachodniopomorskie	3.4
IT	Sicilia	3.4
FI	Pohjois-Suomi	3.4
NL	Friesland	3.3
Slovenia	Slovenia	3.3
Denmark	Denmark	3.2
IT	Puglia	3.2
IT	Basilicata	3.2
IT	Calabria	3.2
FR	Bretagne	3.0
FR	Basse-Normandie	2.9
FR	Aquitaine	2.9
NL	Noord-Brabant	2.8
FI	Itä-Suomi	2.7
Estonia	Estonia	2.7
FI	Länsi-Suomi	2.7
SE	Västsverige	2.6
FR	Nord - Pas-de-Calais	2.6
Latvia	Latvia	2.6
PL	Pomorskie	2.6
SE	Mellersta Norrland	2.6
FR	Poitou-Charentes	2.6
NL	Groningen	2.6
FR	Pays de la Loire	2.5
NL	Zuid-Holland	2.5
SE	Norra Mellansverige	2.5
SE	Småland med öarna	2.5
FR	Haute-Normandie	2.5
FR	Picardie	2.4
SE	Sydsverige	2.4
SE	Övre Norrland	2.4
NL	Flevoland	2.3
SE	Östra Mellansverige	2.3
Lithuania	Lithuania	2.3
PL	Warmińsko-Mazurskie	1.8
Romania	Sud - Est	1.5

Countries	Regions (*)	Employment in hotel and restaurant/Total Employment (%)
FR	Guadeloupe	n.a.
FR	Martinique	n.a.
FR	Guyane	n.a.
FR	Réunion	n.a.

Source: Authors processing of Labour Force Survey (LFS) data, Eurostat

(\*) For Germany, United Kingdom and Romania only national data are available

## Annex 2.

Table 11: Objective distribution of coastal regions, 2007-2013, EU 27

	Convergence	Competitiveness	Phasing in	Phasing out
Austria	0	0	0	0
Belgium	0	1	0	0
Bulgaria	2	0	0	0
Cyprus	0	0	1	0
Czech Republic	0	0	0	0
Denmark	0	1	0	0
Estonia	1	0	0	0
Finland	0	5	0	0
France	4	11	0	0
Germany	1	2	0	2
Greece	9	0	1	2
Hungary	0	0	0	0
Ireland	0	1	1	0
Italy	4	9	1	1
Latvia	1	0	0	0
Lithuania	1	0	0	0
Luxembourg	0	0	0	0
Malta	1	0	0	0
Netherlands	0	7	0	0
Poland	3	0	0	0
Portugal	4	1	1	1
Romania	1	0	0	0
Slovak Republic	0	0	0	0
Slovenia	1	0	0	0
Spain	3	4	3	2
Sweden	0	8	0	0
United Kingdom	2	22	2	1
Total	38	72	10	9

Source: Authors

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## Reader's Notes



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