DRAFT ANNUAL TOURISM REPORTING TEMPLATE

1. INTRODUCTION

Council Decision 86/664/EEC of 22 December 1986[1] establishing a consultation and cooperation procedure in the field of tourism foresees that “each Member State shall send the Commission, once a year, a report on the most significant measures it has taken and, as far as possible, on measures it is considering taking in the provision of services for tourists which could have consequences for travellers from the other Member States”.

With the publication of the “Agenda for a sustainable and competitive European tourism”, the Commission announced that “in order to strengthen the collaboration with and among Member States, their current annual reporting through the Tourism Advisory Committee (TAC) will be used to facilitate the exchange and the dissemination of information about how their policies and actions safeguard the sustainability of tourism”.

This Communication was welcomed by the Competitiveness Council conclusions (22nd-23rd November 2007) and by the Presidency Conclusions of the Brussels European Council of 14th December 2007.

The main aims for the reporting process are:

- to be able to monitor the level of implementation of the “Agenda for a sustainable and competitive European tourism” by Member States;
- to facilitate the exchange of experiences among member States with regard to how they tackle issues which are important for the competitiveness and sustainability of European tourism.

MS reports referring to year *n* shall be sent to the European Commission by the end of February of year *n*+1.

If the reports are sent in English, the deadline is shifted to the end of April.

2. ORGANISATIONAL STRUCTURE

This section should provide an overview of the main organisational structure to illustrate how tourism is organised and managed, to identify linkages and to identify the engagement of other organisations/stakeholders.

The information required will only need to be prepared fully in year 1 as it will subsequently only be necessary to provide details of any changes.

[1] Official Journal L 384, 31/12/1986 P. 0052 – 0053.

2.1 Please identify the National Bodies responsible for tourism (Ministry and also any separate/related National Tourism Organisation), including key areas of responsibility, and their relationship to other national bodies. (maximum of 1.000 characters)

FLANDERS

At the administrative level the two main actors are the Flemish Department of Foreign Affairs ("Departement internationaal Vlaanderen"; policy division) and Toerisme Vlaanderen, whose main responsibilities can be described as follows:

A. Flemish Department of Foreign Affairs (Policy Division – Tourism Unit)

1. Policy support, preparation, monitoring and evaluation

   keeping track of trends, developing new regulations, issuing policy opinions to the Minister and the Government; monitoring the execution of the management agreement between the Flemish government and Toerisme Vlaanderen; overseeing the implementation of the policy and making an assessment of the approach; follow-up of international organisations e.g. EU, UNWTO, OECD; steering the research institution Steunpunt Toerisme en Recreatie (until end 2011)

2. Touristic licences

   granting and controlling licences for tourist accommodation and travel agencies

B. Toerisme Vlaanderen

1. Policy execution
2. Marketing and promotion of Flanders as a destination

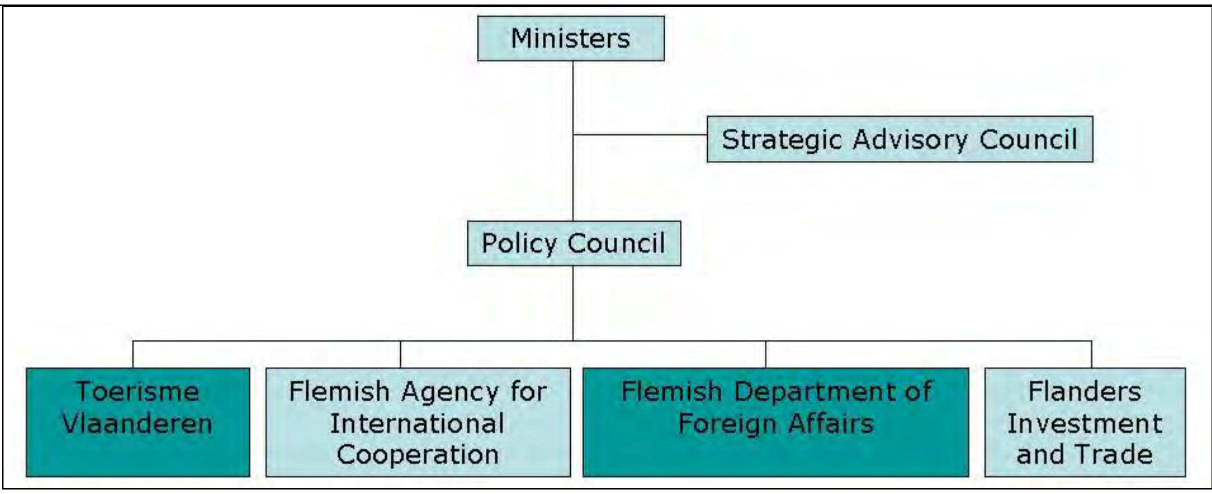
   Toerisme Vlaanderen has information centres in The Hague, Cologne, Paris, London, Milan, Vienna, Barcelona, New York, Beijing and Tokyo. Toerisme Vlaanderen also has representation offices in Russia (Moskou) and India (New Delhi, Mumbai). The Danish/Swedish market is actively marketed from the Brussels office.

3. Providing support to and coordination of the tourist industry in Flanders

   coordinating and supporting provinces and local authorities (in developing strategic plans/ product development/ touristic welcoming services,…); gathering and dissemination of information and knowledge; research; communication; cooperation; product development; encouraging quality control in the sector; funding for tourist-related investments/ touristic-recreational projects/ tourism employment/ events; training for the tourist industry; promoting sustainable tourism; consultation with other policy areas e.g. mobility, environmental planning, culture,…

4. Increasing holiday participation

The Authorities of Flanders contain 13 policy areas in total. Tourism is part of the **Flemish Foreign Affairs Policy Area**, which can be presented as follows:



GERMAN SPEAKING COMMUNITY

The Tourism Services in the German Speaking Community of Belgium has been adapted. In accordance with the concept of the rural development in a general, a new strategy has been worked out. A clear separation between Ministry and Agency for promotion has been set on paper.

While the agency is charged with the development of relevant products and the strategic issues, the Ministry sets down the rules and develops a master plan of needed infrastructure and facilities.

WALLONIA

The actors are the Ministry for Tourism, the "Commissariat général au Tourisme", Wallonie -Bruxelles Tourisme (formerly Office de promotion du Tourisme -OPT) and le Centre d'Ingénierie touristique de Wallonie.

A. The Ministry for Tourism is in charge of the conception of the touristic policy.

B. The "Commissariat général au Tourisme - CGT (General Tourism Commission) »

Le CGT is the agency responsible for implementing the Walloon government's overall tourism policy. Since 2008, when the CGT became a public body, it has taken a more proactive approach to management that has allowed it to respond more appropriately to changes in the industry.

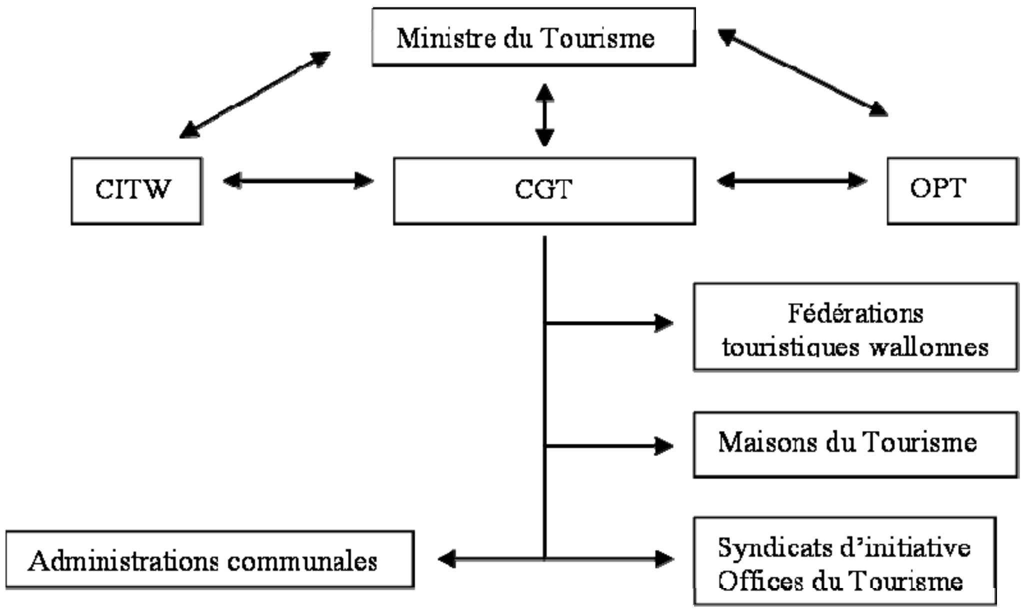
Its missions are executing touristic policy, managing touristic equipment which belongs to the Walloon Region and organising and promoting tourism on the Walloon territory. To do so, the CGT is in charge of classification and subsidy lines, promotion actions in Wallonia, conception and content of the image, official brochures, touristic data, products conception, fair participation.

C. « Wallonie-Bruxelles Tourisme - WBT (Wallonia-Brussels Tourism Bureau)»

The second institutional player in Walloon tourism, WBT, has the chief responsibility for promoting Wallonia and Brussels as tourism destinations in Flanders and abroad.

D. « Le Centre d'Ingénierie touristique de Wallonie – CITW (The Walloon Tourism Engineering Centre) »

Lastly, with support from European funds, the CITW, a joint economic and tourism development undertaking of Walloon municipalities, has been organising and implementing "tourism engineering policies" in Wallonia, pooling responsibilities and co-ordinating actions at the Walloon territorial level, as well as co-ordinating more generally the studies performed by specialised consultants.



BRUSSELS

Tourism services of the French Community Commission of The Brussels Capital Region is responsible for implementing tourist policy decided by the authority, applying rules and regulations in force or the tourist sector, investing in equipment by subsidies, subsiding promotion relating to the image of Brussels as well as organisation of thematic visits and promotion of regional-scale tourist activities, supporting promotion of Brussels in the rest of the world along the line of the "Office de Promotion du Tourisme" policies, making studies and survey about tourist demand.

2.2 Please, describe what organisations/agencies are used to deliver services at the national and regional level and the services that they deliver. (maximum 800 characters)

FLANDERS

1. Toerisme Vlaanderen

(general information: see question 2.1.)

1.1. Infopunt Toegankelijk Reizen

stimulates efforts in the tourism sector to give people with a (fysical) disability a pleasant holiday; gives information on the accessibility of accommodation, transport, attractions and musea at the destination

service of Toerisme Vlaanderen

1.2. Steunpunt Vakantieparticipatie

develops a travel offer for people with a limited income
service of Toerisme Vlaanderen

2. Flemish Department of Foreign Affairs (see question 2.1.)
3. Strategic Advisory Council Flemish Foreign Affairs

The Strategic Advisory Council Flemish Foreign Affairs advises the Flemish government in its international policy, including tourism. It formulates advises on its own initiative or on request about draft cooperation agreements, regulation proposals, policy intentions, …The Council comprises representatives from the community-based organisations and independent experts.

4. Steunpunt Toerisme en Recreatie

Conducts scientific research with a strong policy supporting value
financed by the Flemish Government (Flemish Departement of Foreign Affairs and Flemish Department of Economy, Science and Innovation) for the period 2007-2011
(note: until end 2011)

GERMAN SPEAKING COMMUNITY

Tourism service for East Belgium: advertising and promotion of Tourism in East Belgium. A near cooperation with business promotion and economic development is prepared. Common work with other external bodies in view of a better use of EU funds such as EFRE and Interreg. Prospection of new markets, near or far. Facilitating cooperation with other bodies by making up treaties in PPP.
New products are to developed, such as cycling and walking programs.
Special attention is placed in the use of new technologies (ict) and the development of adapted programs.

WALLONIA

The CGT is organised as follows:

- The Tourism Organisations Division
- The Tourist Attractions and infrastructures Division, who is in charge, amongst other things, of social tourism;
- The Tourism Accommodation Division;
- The Tourism Products Division, who is in charge, amongst other things, of the development of the web portal of Walloon tourism (www.tourismewallonie.be); and
- The Tourism Strategy Division, who monitors the implementation of "Destination 2015" and is in charge of the Walloon Tourism Observatory.

WBT has four principal objectives:

1. To focus investment on high-potential tourist origin markets, namely:
   - priority markets for Wallonia and selective actions for Brussels, aimed at Flanders;
   - priority markets for Wallonia and for Brussels, aimed at the Netherlands, France,

Germany and the United Kingdom;

- priority markets for Brussels and selective actions for Wallonia, aimed at Spain, Italy, and the United States; and
- diversification markets: Poland, Japan, Québec, and China.

2. Boosting the image, reputation and visibility of Wallonia as a destination, by forming partnerships with the Walloon Export and Foreign Investment Agency (AWEX), Bruxelles Export and Wallonie-Bruxelles International (WBI) to boost the visibility of Wallonia and via promotional activities in markets further afield, organised in collaboration with other European destinations.

3. Innovating and improving the balance of supply and demand, by market. . For each market (e.g. golfers, gays etc.), Wallonia-Brussels Tourism (WBT) implements annual communication action plans (advertising and marketing), promotion (press and professional trade fairs) and direct marketing (prospecting and forging partnerships with tour operators and carriers), to promote both leisure and business tourism. Training courses are also improving knowledge of markets on the part of tourism service providers.

4. Partnering public and private investments to promote Wallonia as a destination and its tourism products. The WBT's three Walloon promotion clubs, each of which is chaired by a private sector representative, engage in co-operative marketing to pool public and private investments in partnership with the principal tourism industry associations in Wallonia: Club Détente-Découverte Excursions, Club Détente-Découverte Séjours, and Club MICE Wallonie.

The CITW (see 2.1)

BRUSSELS

see 2.1

Partners are :

- Visit Brussels which associates Brussels tourist actors, works concretely on city image, deals with welcome service, supports private and public operators for business tourism
- Wallonie Bruxelles Tourisme (WBT) which is in charge of the promotion of the city on the foreign markets
- BHA and "Horeca" for the hotels, restaurants and pubs sector
- "Hostels in Brussels "for youth accomodation

2.3 Please, describe which other bodies and organisations are involved at the national level and the process for involving them. (maximum 800 characters)

FLANDERS

The Economic Inspection is responsible for the supervision and inspection of consumer protection matters.

WALLONIA
(see2.1 and 2.2)

BRUSSELS
The Economic Inspection is responsible for the supervision and inspection of consumer protection matters.

2.4 Please provide a diagram/organogram of the organisational structure for tourism identifying the relationship between national, regional and local bodies. Provide also a short description of the core responsibilities and competencies of each of the organisations. Include also information regarding the direct and indirect links between other departments, stakeholder organisations and unions. Information about mechanisms of decision making process participation from outsider organisations, e.g. forums, advisory committees is also requested. (maximum of 2.000 characters)

FLANDERS

1. Flemish Level

a) See under 2.1-2.3

b) Federation Tourism Industry

represents the tourism industry in Flanders

c) Guidea Kenniscentrum voor Toerisme en Horeca vzw

conducts research; collects and disseminates knowledge to employees, employers, professional organisations; advises policy makers on tourism and horeca

financed by the social partners of the Horeca-sector and Toerisme Vlaanderen

2. Provinces

a) Main responsibilities: giving information and promotion on the domestic market, data collection for Flemish cyclical research, ad hoc research on provincial level, exploitation of tourism products

3. Municipalities and cities

a) Main responsibility: giving information to the public (welcoming service)

b) Some municipalities and cities have a ‘Flanders information office’ or ‘Regional information office’, which means that they also give information about other Flemish provinces and municipalities

c) Some municipalities and cities (which can or cannot be situated in the same province) join forces in regional cooperation structures.

d) The municipalities and cities of the coastal area join forces within the framework of the

'Strategic Policy Plan for the Coast'.

e) The art cities Brussels, Antwerp, Ghent, Bruges, Leuven and Mechelen join forces within the framework of the 'Art Cities Action Plan'.

f) VVSG (Vlaamse Vereniging van Steden en Gemeenten)

represents the local authorities in Flanders

WALLONIA

1. Walloon level : "CGT", "WBT" and " CITW ".

2. Provinces : 1 touristic federation per province

3. Supra municipal level : 42 Tourist Houses ("Maisons du Tourisme") in charge of welcoming service and local promotion

4. Municipalities :

a) Most municipalities have a Tourist Office which works together with the local Tourist House.

b) An "Art Cities Network" has been put into place in 2008.

c) "Territorial quality plans" have been elaborated for 25 municipalities with the support of the CITW. Their implementation will start in 2012 and will need an important "trans-administration" collaboration.

2.5 Please provide information about financial data, including spend/budget on tourism as a percentage of overall government spend/budget, the level of national funding support for tourism marketing, the amount of EU funding support made available for tourism and data concerning the support to SMEs and Destinations. (500 characters)

FLANDERS

- total tourism budget of the Flemish government: 58,6 mio euro
- budget on tourism as a percentage of overall Flemish government budget : 0,4%
- funding support for tourism marketing: 10,1 million Euro
- the amount of EU funding support made available for tourism: 2,4 million euro

(figures 2011)

WALLONIA

The 2012 budget of the CGT is EUR 51.5 million, of which EUR 8.59 million is earmarked for operations. The budget does not take into account the funds granted for projects co-financed by the European Commission (the overall budgets approved for the programming period 2007-2013 amount to some EUR 97 million).

BRUSSELS

7,415 million Euro for 2009

3. POLICIES AND STRATEGIES

3.1 Is there a current National Strategy for tourism? Yes X No ☐

If yes, please, provide information in bullet point format about the key aims, objectives and priorities of the strategy highlighting those that are designed to address sustainability issues in economic, environmental and social terms in particular those related in the six aims included in the Agenda. In preparing the tourism strategy, explain how consideration has been given to the 9 principles set out in the Agenda (para2.3 p5) and given in the appendix. (maximum 1.000 characters)

FLANDERS

Five strategic objectives have been formulated by the 2009-2014 Flemish Government in its tourism policy paper:

1. Enhancing the attractiveness and the perceptive value of (the) tourist destination(s) (in) Flanders
2. Stimulating tourist entrepreneurship
3. Conducting a forceful marketing policy per macro product with a view to increasing the economic returns
4. Enabling every Flemish citizen to fully participate in tourism
5. Enhancing the efficiency and the effects of the activities of the authorities engaged in the tourism sector

The Flemish tourism sector, both public and private, has recently completed a very important and comprehensive exercise that will determine the development of tourism in Flanders in the next decade. The new 'Strategic Policy Plan 2020 for Tourism in Flanders-Brussels' sets out the strategic framework for Flemish tourism, and defines the desired position of tourism in Flanders by 2020, and how this can be achieved. The Plan recognises that the integrated and co-ordinated development of tourism is a challenge, given the diversity of the issues and actors involved . Its aim is to respond to these challenges and to develop an umbrella tourism strategy for all the actors. More than 150 organisations were involved in the Plan's development, including the provinces, the Flemish art cities, private sector associations, representatives from other policy areas such as transport, heritage and education, and social tourism organisations. Each of these actors will have its own specific role in the Plan's implementation. For that reason it includes a Tourism Pact, whereby all actors explicitly subscribe to the strategic framework and indicate by their signature their commitment to its implementation. The Plan will both increase the competitiveness of the destination and help to raise the profile of tourism as an important (economic) sector.

(Attached you will find a copy of the Tourism Pact, which has been signed end of January 2012)

WALLONIA

In 2010, a meeting with over 1000 tourism industry stakeholders was held to launch, and examine the planned implementation of, Destination 2015 which was designed as a tool to plan the activities of the Tourism Department (Box 4.5).

Destination 2015 was intended to establish a five-year strategic plan containing the main "tourism" points from the Regional Policy Declaration of 2009 and transform them into concrete projects.

Destination 2015 is a discussion and consultation document. It has been envisaged as a programme to be followed flexibly, and its implementation requires that a number of demand- and supply-side issues are taken into account:

- on one hand, it is recognised that the results of tourism activities depend on broad trends such as holiday schedules and their spacing (in proximity markets), which influence the number of overnight tourism visits; the weather, which influences visits to tourist attractions; and the financial crisis and rising living and transport costs, which also influence tourist behaviour;

- on the other hand, the human and financial resources available for implementing the programme within the CGT and the WBT need to be considered.

Destination 2015 involves the pursuit of seven objectives, each of which is broken down into key themes and a series of specific action proposals:

- to measure the importance of the tourism economy;
- to promote balanced tourism development;
- to encourage "proximity tourism";
- to reflect on tourism diversity;
- to consider Wallonia's image and reputation for quality in foreign tourism markets;
- to work with tourist operators and expand partnerships; and
- to share knowledge.

Lastly, Destination 2015 looks to the future, as the CGT moves away from a project management culture towards a culture of planning and evaluation, and the adoption of a multi-year programming approach.

Further details can be found at www.printempsdutourisme.be

BRUSSELS

In 2006 Sittings for Tourism were organised by the authority integration de recommendations listed in the Strategic Plan 2006-2016. As a traversal competence the conclusions were drawn as follows, Brussels has 3 touristic pillars: Culture, Art of Living and Europe. The principles of sustainability were integrated such as economic viability, adapted schooling, PPPs, eco-labialising, integration of multiculturalism.

GERMAN SPEAKING COMMUNITY

A new strategic plan is worked out. The order has been given to an Austrian specialized society.

3.2 Who was the initiator and who is responsible for its implementation? (maximum 200 characters)

FLANDERS

The Flemish Minister responsible for tourism initiated the strategic goals of the tourism policy paper 2009-2014 and both Toerisme Vlaanderen and the Flemish department of foreign affairs are responsible for its implementation.

The Flemish governement initiated the development of the strategic tourism policy plan 2020 for tourism in Flanders-Brussels, but more than 150 organizations were involved in the development process of the plan. All these actors have a responsibility in the implementation of the strategic plan. (see also question 3.1.)

WALLONIA

The Walloon Minister for tourism and his administration is responsible for the initiation of the policies. The “General Tourism Commission” is responsible for their implementation in Wallonia and the “Wallonia-Brussels Tourism Bureau” is responsible for their promotion in the rest of the world.

BRUSSELS

The Brussels Minister for Tourism is responsible for the implementation of tourist policies;

GERMAN SPEAKING COMMUNITY

The Minister, responsible for Tourism, has given the order.

3.3 How is the strategy monitored and how often? (maximum 500 characters)

FLANDERS

The Flemish tourism policy strategy 2009-2014 is monitored on a yearly basis. Each year, the minister presents in the parliament his policy letter, where he reports on the policy execution to the parliament for the year ending and on the policy execution plans for the year ahead.

Tourism actors will monitor the implementation of every strategic objective of the strategic tourism policy plan 2020 for tourism in Flanders-Brussels against a set of indicators. At an annual States General, all tourism actors will report upon and discuss the implementation of the strategic policy plan for tourism in Flanders. Tourism actors report about their previous year’s contributions to the realisation of the formulated objectives. In addition, they present the projects that they plan to launch in the coming year for implementing the strategic policy plan for tourism in Flanders. The Advisory Committee of Tourism Flanders has been given the task of monitoring and guiding several times per year the implementation of the strategic policy plan for tourism in Flanders. The Advisory Committee presents the state of affairs in the implementation of the strategic policy plan at the annual States General. In 2014 the Flemish Department of Foreign Affairs makes an interim evaluation of the strategic policy plan for tourism in Flanders. The Advisory Committee presents this evaluation at the annual States General.

WALLONIA

In February 2012, a second meeting was organised to present Destination 2015 « Review and prospects », including a mid-term evaluation of its implementation.

GERMAN SPEAKING COMMUNITY

Monitoring will be done by external group.

3.4 What tourism specific legislation exists? (maximum 500 characters)

FLANDERS

The most important Flemish tourism legislation include:

1. The 'Tourism for all' decree, the aim of which is to make tourism accessible to all segments of the Flemish population
2. The 'Accommodation' decree, which classifies and defines the minimum licencing standards for Flemish tourist accommodation
3. The 'Travel agencies' decree, which regulates the activities of travel agents and travel organizers
4. 'Touristic Cooperation Structures' decree: currently the implementing orders are drawn up

GERMAN SPEAKING COMMUNITY

Decrees related to regulation of all kinds of Tourist accommodations such as hotels, campsites, holiday apartments and youth hostels.
Help in investments for above mentioned accommodations

A new developed codex is in progress.

WALLONIA

A Walloon code for tourism has been elaborated. It gathers rules and regulations which are linked to the missions of the "General Tourism Commission" i.e. accommodation, attractions, travel agencies, equipment, etc.
See: http://wallex.wallonie.be

BRUSSELS

Touristic legislation relates to the touristic accommodation, which classifies and defines the minimum licencing standards for accommodation, bed & breakfast, equipment, travel agencies and social tourism.

4. MEASURES AND INITIATIVES

This section provides Member States with an opportunity to outline specific initiatives and policies that are or are going to be adopted to manage and develop tourism activity in ways which respond to the key challenges of the Agenda and which fall within the six main aims of the Agenda itself.

1 Economic prosperity

a. To ensure the long term competitiveness, viability and prosperity of tourism enterprises and destinations.
b. To provide quality employment opportunities, offering fair pay and conditions for all employees and avoiding all forms of discrimination.

2 Social equity and cohesion

a. To enhance the quality of life of local communities through tourism, and engage them in its planning and management
b. To provide a safe, satisfying and fulfilling experience for visitors, available to all without discrimination by gender, race, religion, disability or in other ways.

3 Environmental and cultural protection

a. To minimise pollution and degradation of the global and local environment and the use of scarce resources by tourism activities.
b. To maintain and strengthen cultural richness and biodiversity and contribute to their appreciation and conservation.

4.1 Please set out, briefly, the steps which have been or will be taken, if any, to address the 7 key challenges for the delivery of sustainable and competitive tourism, covered in the TSG report and referred to in the 'Agenda'.

4.1.1 Reducing the seasonality of demand. (maximum 200 characters)

FLANDERS

- the activities undertaken to offer people with a limited income travel experiences, reduce seasonality (e.g. Calypso project)

GERMAN SPEAKING COMMUNITY

Making up niches offers for target groups such as "gourmet tours" related to specific and season related natural events such as spring awakening, hunting time, first snow, …

Good use of local habitudes such as carnival

Development of a four seasons cycling and walking programm as follow up of the construction of tracks on abandoned railway tracks.

WALLONIA

Specific actions of "Destination 2015" (see 3.1) such as the various projects in regards with territorial

or sectorial quality plans.

4.1.2 Addressing the impact of tourism transport. (maximum 200 characters)

FLANDERS

- active support of cycle and walking tourism with specific action plans

-creation of a working group for sustainable recreational transport, with representatives of both the touirsm sector and the transport sector. The working group e.g. created an action plan and developed an information and recommendation note for the ministers of tourism and transport.

- studies of ‘Steunpunt Toerisme en Recreatie’ : ‘Sustainable recreational transport in Flanders – challenges for tourism’ and ‘Barriers and stimulli for cycling tourism as an engine for regional development in flanders’

WALLONIA

The national Railway Company (SNCB) sells combined tickets which includes the attraction entrance and transportation fees, they are called B-excursions.

4.1.3 Improving the quality of tourism jobs. (maximum 200 characters)

FLANDERS

- subsidies to touristic associations for employment

- providing and supporting touristic education and training (e.g. language trainings, marketing, communication, subsidies for the ‘Master in Tourism’ at the K.U.Leuven university, training for travel and tour guides)

- providing research and data (e.g. ‘Tourism in Figures’; tourism databases)

GERMAN SPEAKING COMMUNITY

An initiative of Quality management of Tourist offer by the Government should, on a long term, assure a better quality of offer and jobs.

The implementation of a QM System in accordance with the Swiss QM has been lounched.

WALLONIA

The competence centre for tourism within the FOREM (the Walloon employment institution) gives specific trainings in tourism e.g. accessibility and languages.

4.1.4 Maintaining and enhancing community prosperity and the quality of life, in the face of change. (maximum 200 characters)

FLANDERS

- study of ‘Steunpunt Toerisme en Recreatie’ on ‘Tourism and the battle for the urban public space’ started in 2009

GERMAN SPEAKING COMMUNITY

A new view on business such as enhancing quality of life for the inhabitant will have as a logic consequence, that the quality of life for Tourists will be better automatically. Added to this, Tourist specific offers are adapted to inhabitant needs.

4.1.5 Minimising resource use and the production of waste. (maximum 200 characters)

FLANDERS

- 'De Groene Sleutel' labels (ecolabel for camping sites, youth accomodation who are environmentally conscious about energy, water and waste) were awarded in March 2012 to 89 tourism companies (11 camping sites , 24 youth accomodations, 24 hotels, 11 guest rooms, 8 attractions, 1 holiday residence and 7 meeting locations). Besides the 89 winners, there are 248 tourism entrepreneurs who follow the support programme at Toerisme Vlaanderen.

GERMAN SPEAKING COMMUNITY

Research will be done in view of CO^2 free or CO^2 neutral Tourism. A no more used railway track is transformed into a cross border bicycle track with a length of about 150 km.

All restoration and hotel offers use local ore regional products to make live local agriculture. More over, the use of local products make a serious contribution in the enhancing of Tourist offers.

BRUSSELS

- ecolabel:La "clé verte"(green key) for hostels,bed and breakfast, youth hostels, possibly open to mice.

4.1.6 Conserving and giving value to natural and cultural heritage. (maximum 200 characters)

FLANDERS

- Impulse programme for the art cities; financial support for several tourism-recreational projects linked to heritage
- active participation of the heritage sector in the strategic tourism policy plan 2020 for tourism in Flanders-Brussels
- active support of cycling and walking tourism

WALLONIA

- Wallonia takes part of the Eden project aiming at enhancing touristic identity, putting the Region into a European prospective and applying the principles of sustainability
- Putting a "Bistrot de terroir" (Local quality pub) label into place

- a specific project to promote tourism in the Ardennes forest: This project is being implemented on the basis of a strategic study prepared by the CGT and DGO3 (Directorate of Nature and Forests, DNF) in co-operation with the University of Louvain. The project brings together, in a forest territory, all the stakeholders necessary to the construction of a tourism product. It therefore involves multi-faceted co-ordination: horizontal (between the two competent administrations, CGT and DGO3-DNF), and vertical (between the two administrations and the local authorities, as well as private and public stakeholders in the region). Its objective is to promote the Walloon forests from a perspective of nature preservation and local initiative.

- a platform of reflection on "Tourism and Culture", divided into working groups organised according to horizontal themes (heritage, museums, economy, statistics etc.), bringing together the Wallonia-Brussels Federation, the CGT, WBT, the Walloon Heritage Institute (IPW), DGO4 Heritage etc.

- a platform of reflection on "Tourism and Heritage", comprising Walloon government agencies responsible for the preservation and promotion of the region's built heritage: CGT, DGO4 Heritage and IPW, to co-ordinate policies, subsidies and activities for promoting the Walloon heritage.

4.1.7 Making holidays available to all. (maximum 200 characters)

FLANDERS

- further development of the 'Steunpunt Vakantieparticipatie' services (see also question 2.2) 'Steunpunt Vakantieparticipatie' (centre for travel participation) is a service of Toerisme Vlaanderen that develops a travel offer for people with a limited income. It contains day trips, trips of several days or longer, individual trips, organised trips and group arrangements. Steunpunt Vakantieparticipatie continuously looks for new tourism supplying partners.

- Toerisme Vlaanderen acts as project leader in the Calypso project 'FETE' (First European Travel Experience), which aims at developing an international exchange programme for youth (16-26 years old) with financial and other barriers to travel during low season.

GERMAN SPEAKING COMMUNITY

The authority invests in several kinds of natural attractions such as bicycle tracks and natural trails, making no additional cost for the user. Outdoor pastime in free nature will bring no additional cost for Tourists, while the offer is interesting. Investments by the Authority in pool or sport accommodations f. inst. help keep income prices on a low level.

WALLONIA

Subsidies are given to social tourism centres.

4.2 As key challenges may change over time, please identify any other areas that are becoming a new challenge. (maximum 600 characters)

FLANDERS

The strategic tourism policy plan 2020 for tourism in Flanders-Brussels defines the following as the main challenges for tourism in Flanders towards 2020:

- Improving tourism knowledge base (defined as the most important challenge)
- Improving attractiveness of tourism employment and professionalization
- Creating a favourable business climate
- Investing in a diverse, qualitative and diverse tourism offer
- Improving access to the tourist offering
- Improving (physical) accessibility
- Branding Flanders as a tourism destination
- Reinforcement of tourist reception
- Increasing participation in tourism

GERMAN SPEAKING COMMUNITY

The need of narrow given statistics for a better react on external events appears more and more. There behind, a participation in a national program of Travelsat competitive index will help to identify new challenges on time

WALLONIA

- the success of developing the networks mentioned above and the creation of new:

- Tourism department: a working group comprising representatives of the Minister of Tourism, the CGT and the Wallonia-Brussels tourism office has been established to address projects such as the preparation of the Strategic Plan Destination 2015, and the organisation of the “Années des Saveurs” gastronomy promotion.

- “Strategies” network: a working group comprising the CGT, WBT, CITW and the Forem tourism skills centre has been established to address common concerns such as training needs in the sector, and the introduction of a quality initiative.

- Public-private partnerships: several partnerships have been established, such as collaborative working groups between the CGT and consultants from Walloon universities (scientific support for various projects) or the private sector (operational studies); between the CGT and tourism professional associations (Horeca, Gîtes de Wallonie, Accueil Champêtre, CAWAB, MSW etc.).

- A working group has been set up on "leisure zones" comprising the CGT, DGO4 (local development planning) and the CITW to develop a concerted Walloon approach to a land-use policy from the viewpoint of tourism development, and to identify areas suitable for designation as "leisure zones" under the procedure stipulated in the CWATUPe (Walloon Code on Land Use, Urban Development, Heritage and Energy).

- Collaboration with DGO4 (local development planning) and the CPDT (Standing Conference on Local Development) in the context of updating the regional development plan in order to review the role that tourism should play in this local development instrument.

- the success of the PPPs (Promotion clubs)

BRUSSELS
- developing youth tourism (promotion and infrastructure)
- creating accommodation for trainees in the European institutions

4.3 Please identify and describe a specific initiative, which is related to the 7 key challenges, that is innovative/ successful and which would be of interest to or of help to other Member States. (maximum 2.000 characters)

FLANDERS

'Tourism for All' is a very successful initiative in the Flemish community. 'Steunpunt Vakantieparticipatie' (centre for travel participation) is a service of Toerisme Vlaanderen that develops a travel offer for people with a limited income. It contains day trips, trips of several days or longer, individual trips, organised trips and group arrangements. Steunpunt Vakantieparticipatie continuously looks for new tourism supplying partners.

WALLONIA

The development of a quality approach to tourism along the lines of the principles of sustainability.

5. MECHANISMS FOR IMPLEMENTATION

Three mechanisms for implementing the Agenda were identified in the "Agenda": sustainable destinations, sustainable businesses and responsible tourists.

5.1 *Sustainable destinations*: What support is given to strengthen destination management at the regional/ destination level (supportive policy environment, knowledge networks, training programmes, establishment of measures/indicators for benchmarking, etc.)? (maximum 600 characters)

FLANDERS
- development of the strategic tourism policy plan 2020 for tourism in Flanders-Brussels (see questions 3.1, 3.2, 4.2)
- providing and supporting touristic education and training (e.g. language trainings, marketing, communication, subsidies for the 'Master in Tourism' at the K.U.Leuven university, training for travel and tour guides)

- development of a TSA for Flanders

(see management summary TSA Flanders attached)

GERMAN SPEAKING COMMUNITY

A system of quality management is to be installed.

Certification of attractions and development of standards for walking trails and wellness offers are to be developed.

WALLONIA

An EDEN+ network was implemented at the end of 2011 as a 2nd phase to the EDEN project.

5.2 *Sustainable businesses*: What support is given to strengthen the sustainability and competitiveness of businesses (supportive policy environment, orientation of business support services to sustainability, training, financial incentives, etc.)? (maximum 600 characters)

FLANDERS

- subsidies for sustainable touristic-recreational projects
- UNWTO Global Code of Ethics in Tourism added to the travel agency regulation in 2008
- Stimulating 'Travelife' training programme for travel agents
- Green Key label for sustainable entrepreneurs (see also question 4.1.5.)

GERMAN SPEAKING COMMUNITY

Learning areas for people wore in information centres and Horeca sector will start up in the course of this year. Working together with life long learning providers in an out of the Community has been set up.

5.3 *Responsible tourists*: What support is given to promote responsible choices by tourists (e.g. sustainability in education, national marketing and media campaigns, promotion of certification schemes)? (maximum 600 characters)

FLANDERS

- integration of sustainability in tourism education programmes at secondary level (2011-2012)
- learning network for bachelor education programmes in hotel management and tourism management: exchange of information on sustainability and corporate social responsibility (3 or 4 meetings per year)

GERMAN SPEAKING COMMUNITY

Learning and educational programs in Nature centres and continue development of nature trails along with distribution of fliers help enhancing local and tourist behaviour.

6. DATA AND INDICATORS

Eurostat will provide, as an annex, the key statistical data required to support the reporting process covering around 20 indicators[2]. These are mainly related to the aim of 'economic prosperity'.

Please, identify indicators that are being used or developed which could add to the range of information being provided by Eurostat, particularly in relation to social and environmental issues (other indicators from the TSG report, visitors/ residents satisfaction, etc.). (maximum 500 characters)

FLANDERS

Regional TSA 2008 for Flanders: management summary attached.

WALLONIA

Since 2000 the Walloon observatory of tourism has been cater for statistics. Surveys are being made on a regular bases.

7. COMPLEMENTARY ADDITIONAL INFORMATION

If necessary use the following box to provide additional complementary information that has not already been covered.

[2] These indicators have been selected from the 50 TSG indicators on the basis of the possibility to calculate them at the European level.

APPENDIX

Principles of sustainable tourism:

- **Taking a holistic and integrated approach**
  All the various impacts of tourism should be taken into account in its planning and development. Furthermore, tourism should be well balanced and integrated with a whole range of activities that affect society and the environment.

- **Planning for the long term**
  Sustainable development is about taking care of the needs of future generations as well as our own. Long term planning requires the ability to sustain actions over time.

- **Achieving an appropriate pace and rhythm of development**
  The level, pace and shape of development should reflect and respect the character, resources and needs of host communities and destinations.

- **Involving all stakeholders**
  A sustainable approach requires widespread and committed participation in decision making and practical implementation by all those implicated in the outcome.

- **Using best available knowledge**
  Policies and actions should be informed by the latest and best knowledge available. Information on tourism trends and impacts, and skills and experience, should be shared across Europe.

- **Minimising and managing risk – the precautionary principle**
  Where there is uncertainty about outcomes, there should be full evaluation and preventative action should be taken to avoid damage to the environment or society.

- **Reflecting impacts in costs – user and polluter pays**
  Prices should reflect the real costs to society of consumption and production activities. This has implications not simply for pollution but for charging for the use of facilities that have significant management costs attached to them.

- **Setting and respecting limits, where appropriate**
  The carrying capacity of individual sites and wider areas should be recognised, with a readiness and ability to limit, where and when appropriate, the amount of tourism development and volume of tourist flows.

- **Undertaking continuous monitoring**
  Sustainability is all about understanding impacts and being alert to them all the time, so that the necessary changes and improvements can be made.

TSA (Tourism Satellite Account)
Flemish and Brussels-Capital Region 2008

Executive Summary

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Under the guidance of
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INTRODUCTION

A Tourism Satellite Account is abbreviated in international literature as TSA. A TSA is an internationally recognised instrument for mapping the economic significance of tourism. The tourism sector is not an easily defined or clearly visible economic sector, but rather an amalgamation of (parts of) different branches of activity. Often, only a part of the output of these branches of activity is used for tourism consumption, which is why a TSA is necessary. On the supply side, the TSA brings together the various essential functional components of the national accounts and at the same time, it links this supply with the actual tourism consumption.

The setting up of the TSA for the Flemish Region is a project carried out by the Research Centre of the Government of Flanders, in collaboration with the Flemish Department of Foreign Affairs, Tourism Flanders-Brussels and the Flemish Support Centre for Tourism, each of which is represented in the Steering Committee. All decisions related to the preparation of the TSA for the Flemish Region have been made within this Steering Committee. Given that the most recent sources at the start of this project were those from 2008, it was decided to prepare the first TSA for 2008. The TSA for 2010 will be drawn up by the autumn of 2012. In addition to a fully-fledged TSA for the Flemish Region, an estimated TSA was also prepared for the Brussels-Capital Region, so that the results for both regions together could also be depicted.

A complete Tourism Satellite Account consists of 10 tables, which are listed below. The tables with names in italics and the table number crossed out are not part of the "TSA - Flemish Region" project. This means that, in the current phase of the project, we only focus on TSA Tables 1, 2, 4, 5 and 6. TSA Tables 7 and 9 will be developed in 2012 and will be part of TSA 2010.

- TABLE 1: Inbound[1] tourism consumption
- TABLE 2: Domestic tourism consumption
- ~~*TABLE 3:*~~ *Outbound tourism consumption*
- TABLE 4: Internal tourism consumption
- TABLE 5: Production accounts of tourism industries and other industries
- TABLE 6: Domestic supply and internal tourism consumption
- ~~*TABLE 7*~~*:* *Employment in the tourism industries*
- ~~*TABLE 8*~~*:* *Tourism gross fixed capital formation of tourism and other industries*
- ~~*TABLE 9*~~*:* *Tourism collective consumption*
- ~~*TABLE 10*~~*:* *Non-monetary indicators*

In this Executive Summary, we will first discuss the used methods, sources and results per table for the TSA of the Flemish Region. In a second part, we take a look at the estimated results for the Brussels-Capital Region and Flanders (as a sum of Flemish and Brussels-Capital Region). Finally, we discuss in greater detail the most important end results and

[1] Since our objective is to prepare not a national but a regional TSA, we must interpret certain concepts differently: "inbound" refers to tourism from outside the Flemish Region (= from abroad + Brussels + Wallonia), while "internal" and "domestic" refer to the Flemish Region.

compare these figures with the end result in other countries and the share of other sectors in the value added in the Flemish Region. All details regarding methods, choices of methods, calculations and (partial) results for each component can be read in the final report on the TSA 2008 for the Flemish Region.

1. METHODS, SOURCES AND RESULTS PER TABLE OF THE TSA FOR THE FLEMISH REGION

The methodological approach of the TSA is described in the manual "*Tourism Satellite Accounts*: *Recommended Methodological Framework*" (UNSD et al., 2008). This report has been prepared in accordance with the modified "*International Recommendations for Tourism Statistics 2008*", (UNSD & WTO, 2008).

The "*Recommended Methodological Framework*" or RMF is the result of collaboration between the World Tourism Organization (WTO) and Organisation for Economic Cooperation and Development (OECD). Both organisations had previously developed their own proposals for creating a statistical model with respect to the economic impact of tourism (WTO, 1983; OECD, 1991). It was only in the nineties that they agreed upon a general conceptual framework and a definition for the concept of tourism (WTO, 1999; OECD, 2000).

In 2001, both organisations (in collaboration with Eurostat and the UNSD) published a methodological guide for the development of a TSA: the "*Tourism Satellite Accounts: Recommended Methodological Framework*" or RMF. In 2008, the WTO, the OECD, the UNSD and Eurostat published a new version of the RMF (UNSD et al, 2008). During the process of updating the RMF, a number of modifications were made to increase the internal consistency and international comparability of TSAs.

During the first meeting of the Steering Committee, it was decided to prepare the TSA for the Flemish Region in accordance with the 2008 RMF. We provide a brief outline below of what this implies for the preparation of TSA Tables 1, 2, 4, 5 and 6.

1.1. TSA TABLES 1, 2 AND 4: TOURISM CONSUMPTION IN THE FLEMISH REGION 2008

On the consumption side, three tables must be completed:

- TSA Table 1 for inbound tourism consumption
- TSA Table 2 for domestic tourism consumption
- TSA Table 4 for total internal tourism consumption.

In **TSA Tables 1 and 2** (inbound en domestic tourism consumption), the tourists are subdivided into various categories. In the first place, we make a distinction between same-day visitors and overnight visitors. We also make a distinction depending on the purpose of the trip: recreational, MICE (Meetings, Incentives, Conferences & Events) or other professional purposes. For TSA Table 1, we also need to know the origin of the tourists and for TSA Table 2, we need to know if the tourists are staying in the Flemish Region or whether they have another destination. For each of these groups, we must try to find out the volume and expenditures of the tourists. The results per group of tourists can be read in the final report on the TSA 2008.

Table 1: TSA Tables 1 and 2, divided according to groups of tourists

<table>
<tr><th colspan="3">TSA TABLE 1: INBOUND TOURISM</th><th colspan="3">TSA TABLE 2: DOMESTIC TOURISM</th></tr>
<tr><td rowspan="6">1a:
Visitors from Wallonia and Brussels in the Flemish Region</td><td rowspan="3">Same-day visitors</td><td>Recreational</td><td rowspan="6">2a:
Flemish visitors in the Flemish Region</td><td rowspan="3">Same-day visitors</td><td>Recreational</td></tr>
<tr><td>MICE</td><td>MICE</td></tr>
<tr><td>Other business trips</td><td>Other business trips</td></tr>
<tr><td rowspan="3">Overnight visitors</td><td>Recreational</td><td rowspan="3">Overnight visitors</td><td>Recreational</td></tr>
<tr><td>MICE</td><td>MICE</td></tr>
<tr><td>Other business trips</td><td>Other business trips</td></tr>
<tr><td rowspan="6">1b: Foreign visitors in the Flemish Region</td><td rowspan="3">Same-day visitors</td><td>Recreational</td><td rowspan="6">2b:
Flemish visitors travelling to Brussels or Wallonia, or abroad</td><td rowspan="3">Same-day visitors</td><td>Recreational</td></tr>
<tr><td>MICE</td><td>MICE</td></tr>
<tr><td>Other business trips</td><td>Other business trips</td></tr>
<tr><td rowspan="3">Overnight visitors</td><td>Recreational</td><td rowspan="3">Overnight visitors</td><td>Recreational</td></tr>
<tr><td>MICE</td><td>MICE</td></tr>
<tr><td>Other business trips</td><td>Other business trips</td></tr>
</table>

These data have been collected based on various research results, the linking of different data sources, the estimation of certain volumes and expenditures or the application of ratios. We can distinguish between six groups of sources, depending on the suppliers of the data and the research results:

- Tourism Flanders-Brussels: "Toerisme in Cijfers" (Tourism in Figures) (2008); MICE (2004): both the dataset of the conferences as well as the conference participants; "Vlaanderen Vakantieganger" (Flemish tourism magazine) (2005).
- WES: "Reisgedrag van de Belgen" (Travel behaviour of Belgians) (2008) with regard to short holidays, long holidays, day trips and commercial trips; "Onderzoek naar tweede verblijven" (Study on second homes) (2007, together with IDEA Consult)
- Westtoer (provincial enterprise for tourism and leisure in West Flanders): KITS (Flemish project on coast indicators and tourism statistics) (2008); "Dagtoerisme aan de kust" (Same-day tourism at the coast) (2009);
- Flemish Support Centre for Tourism: "Attractieonderzoek" (Study of Attractions) (2004)
- Several partners: "Daguitstappenonderzoek" (Day trip study) (2010)
- Foreign studies: Travelpack (UK, 2008); CVTO (Continuous Research on Leisure Spending) (NED, 2008-2009); SIT (Statistics on Inbound Tourism) (NED, 2010).

As all these studies and source data are related to different years, we have to always convert the data on expenditures to 2008 prices. This is done with the help of the Consumer Price Index (CPI).

Since certain groups of tourists cannot be distinguished based on their origin, we indicate their expenditures in a separate column in TSA Table 4. This includes the expenditures of same-day business tourists and second-home owners. We also have no source of information on Flemish visitors (same-day as well as overnight visitors) who travel to Wallonia, Brussels or abroad for business purposes (both MICE and other business purposes). Hence, we cannot include any expenditure for these groups of tourists. Only the air transport costs are included, because we assume a ratio of 100% tourism consumption of this supply.

In Table 6, we use this 100% ratio for both passenger transport by air as well as the services of travel agencies, tour operators and guides. The reason for this is that there is little to no information in the available sources with regard to tourism expenditures on these products, while it is quite obvious that these expenditures are tourism expenditures. Therefore, we work backwards and assume a total tourism consumption of the supply, which we then redistribute over the various groups of tourists in TSA Tables 1 and 2.

The total tourism consumption is calculated in **TSA Table 4**. For this, we firstly combine the tourism expenditures compiled in TSA Tables 1 and 2. As seen in Table 2, we arrive at a total expenditure of EUR 3 billion in the Flemish Region in 2008 as a result of inbound tourism (i.e. tourists from Wallonia, Brussels and abroad). For domestic tourism, i.e. Flemish tourists, we arrive at a total expenditure of over EUR 5.2 billion. In addition, for second-home residents, we estimate approximately EUR 437 million in tourism consumption expenditures and for same-day business tourism, we obtain an amount of over EUR 1.2 billion.

Besides tourism expenditures, there are also other forms of tourism consumption which should be included in the TSA: the value of accommodation in private holiday homes, social transfers and the purchase of sustainable tourism goods.

- The value of accommodation in private holiday homes can be estimated based on the KITS study and the "Vlaanderen Vakantieganger" study. In total, rental value amounting to approximately EUR 336 million is entered in the TSA.
- For the calculation of social transfers (to culture, transport and tourism), we study the budgets of the Flemish government (incl. the Fund for One-off Expenditures and for Tourism Flanders-Brussels) and of the authorities of the five Flemish provinces. Social transfers which may be included in TSA Table 4 according to the RMF include only those transfers or subsidies that benefit the individual tourist. Therefore, we have screened each item on the various budgets based on this condition. Moreover, for subsidies granted to non-profit and umbrella organisations, we examine the primary function of these non-profit organisations and the annual reports of the umbrella organisations to verify whether and to whom these organisations pass on the received subsidies. In total, an amount of over EUR 520 million in subsidies is included in the TSA.
- Finally, there are tourism consumer durable goods, i.e. products purchased for tourism purposes and used several times, such as skiing or camping equipment as well as caravans and camper vans. On the basis of the Enriched Crossroads Bank for Enterprises, the Bel-first database of Bureau Van Dyck and the Household Budget Survey, we can estimate the expenditures made by tourists on these products. We estimate the total value as amounting to approximately EUR 613 million.

Table 2: TSA TABLE 4: Internal tourism consumption in the Flemish Region in 2008 (in euros and based on 2008 prices).

EXPENDITURES	TOURISM EXPENDITURES: TSA TABLE 1: Inbound Tourism	TSA TABLE 2: Domestic Tourism	Second-home residents + groups of friends, family and acquaintances: Coast	Second-home residents + groups of friends, family and acquaintances: Other	Same-day business tourists	OTHER COMPONENTS OF TOURISM CONSUMPTION: Accommodation in second homes	Subsidies	Durable goods	TOTAL
1 Accommodation services	590,031,234	424,552,429				335,794,584			**1,350,378,246**
2 Food and beverages services	759,918,810	487,818,678	153,691,613	5,701,155	214,430,276				**1,621,560,531**
3 Passenger transport services by land (rail+road+water)	89,331,872	280,655,970	23,140,404	1,454,141	262,372,787		169,763,252		**826,718,426**
4 Air passenger transport services	1,076,419,890	1,255,211,673					2,767,353		**2,334,398,916**
5 Services of travel agencies, tour operators and guides	3,042,253	2,180,045,042							**2,183,087,295**
6 Cultural , sports and recreational services	56,074,715	109,950,330	7,458,108	450,091	7,231,548		348,579,691		**529,744,483**
7 **Other**	440,164,462	494,809,487	231,486,748	13,952,826	731,342,784			613,377,733	**2,525,134,039**
TOTAL	**3,014,983,235**	**5,233,043,609**	**415,776,873**	**21,558,212**	**1,215,377,395**	**335,794,584**	**521,110,296**	**613,377,733**	**11,371,021,936**

1.2. TSA TABLE 5: TOURISM SUPPLY IN THE FLEMISH REGION 2008

In **TSA Table 5**, we must enter data that gives us more information about the supply of tourism services produced in the Flemish Region, expressed in basic prices, whether or not these are ultimately used for tourism purposes. Moreover, we also indicate the intermediate consumption and value added of tourism producers.

For filling in TSA Table 5, we always work with data from the regional Input-Output Tables (IOTs) and the regional Supply and Use Tables (SUTs). The figures relate to 2007 and are provided to us by the Belgian Federal Planning Bureau (FPB)[2] at the level of the A-118 branch of activity. Since we are working with the 2007 IOT, all figures need to be converted to 2008 prices.

The branches of activity and the products belonging to the tourism sector are outlined in detail in the RMF 2008 on the basis of NACE and CPA codes. We try to align these codes with the codes from the supply table of the IOT. Since we need certain data on branches of activity to be at a higher level of detail than that offered by the IOT, we encrypt a number of variables from the IOT on the basis of decentralised statistics from the Belgian National Office for Social Security (NOSS)[3]. This database provides information on the number of employees based on NACE codes and at a five-digit level. We are aware that the use of allocation keys is not the most ideal working method[4] but we do not have better information in order to break down a monetary aggregate to a five-digit level. In consultation with the members of the Steering Group, we decided to select the year for which we use data provided by the Belgian National Office for Social Security (NOSS) based on the IOT (in this case, 2007) and to opt for the situation as on 30 June. We also make use of NOSS statistics to single out the tourism products.

The result of this exercise can be seen in Table 3. The interpretation of the figures will be looked into later when discussing the results of TSA Table 6.

Details on the allocation keys applied to the IO codes in order to arrive at the data on tourism-related branches of activity and tourism industries can be found in the final report of the TSA. For the branches of activity, these details can also be viewed in Table 5 of this Management Summary. The final report also discusses in detail how the net output of the tour operators has been booked.

[2] This IOT was prepared by the FPB, under orders of OVAM (Public Waste Agency of Flanders) with the aim of preparing a Flemish environmental IOT. The FPB pointed out that the figures from the IOT and SUT must be handled very carefully, since they have resulted from a rather mechanical allocation. This is because the inter-Regional relationships have been mapped on the basis of allocation keys and not on the basis of observed figures.
[3] By "decentralised", we mean that, where appropriate, the number of employees of a branch of the company situated at a location different from that of the head office is attributed to this other location. In the "centralised" statistics, all employee numbers are assigned to the head office, regardless of where these employees work.
[4] The Belgian National Accounts Institute (NAI) applies a similar method for the regionalisation of a number of macro-economic aggregates.

Table 3: TSA TABLE 5: The Production accounts of tourism industries and other industries in the Flemish Region in 2008 (in euros and based on 2008 prices).

	TOURISM INDUSTRIES										OTHER INDUSTRIES	GENERAL TOTAL (at basic prices)
	1a	1b	2	3	4	5	6	7	8	TOTAL		
	Accommo-dation for visitors	Accommo-dation related to second homes	Food and beverage industry	Road and railway passenger transport	Water passenger transport	Air passenger transport	Transport equipment rental	Travel agencies, tour operators and guides	Cultural, recreational and sports industry			
1 a) Accommodation services	935,742,509	0	277,988,142	0	0	0	0	0	0	**1,213,730,651**	56,354,136	**1,270,084,787**
b) Accommodation (second home)	0	603,842,553	0	0	0	0	0	0	0	**603,842,553**	3,097,283,858	**3,701,126,410**
2 Food and beverages services	218,519,769	0	4,940,180,535	2,115,227	0	0	0	0	51,210,059	**5,212,025,590**	583,620,009	**5,795,645,599**
3 Passenger transport services by land	0	0	0	2,104,360,120	0	0	0	0	0	**2,104,360,120**	273,526,151	**2,377,886,271**
4 Passenger transport services by water	0	0	0	0	70,453,150	0	0	0	0	**70,453,150**	499,334,724	**569,787,874**
5 Passenger transport services by air	0	0	0	0	0	1,952,676,532	0	0	0	**1,952,676,532**	359,761,212	**2,312,437,744**
6 Transport equipment rental services	0	0	0	49,605,070	1,979,334	0	1,630,888,217	12,350,214	0	**1,694,822,834**	602,171,482	**2,296,994,317**
7 Services of travel agencies, tour operators and guides	0	0	0	57,147,727	0	0	0	1,626,125,987	0	**1,683,273,714**	425,715,525	**2,108,989,239**
8 Cultural , sports and recreational services	7,075,549	0	0	0	0	0	0	0	1,475,623,390	**1,482,698,939**	796,677,514	**2,279,376,452**
9 Other	34,958,682	3,195,146,758	742,172,022	374,776,556	484,069,232	375,000,875	332,885,637	442,507,943	412,103,616	**6,393,621,322**	427,584,713,932	**433,978,335,254**
TOTAL OUTPUT (basic prices)	1,196,296,509	3,798,989,311	5,960,340,699	2,588,004,700	556,501,715	2,327,677,407	1,963,773,853	2,080,984,145	1,938,937,065	**22,411,505,405**	434,279,158,544	**456,690,663,949**
INTERMEDIATE CONSUMPTION (purchase prices)	599,872,326	894,388,252	3,849,876,186	1,313,159,643	465,498,924	1,943,775,190	1,043,433,775	1,786,226,003	1,099,480,531	**12,995,710,829**	262,831,304,869	**275,827,015,698**
GROSS VALUE ADDED (basic prices)	**596,424,183**	**2,904,601,059**	**2,110,464,513**	**1,274,845,057**	**91,002,792**	**383,902,218**	**920,340,079**	**294,758,142**	**839,456,534**	**9,415,794,576**	171,447,853,675	**180,863,648,251**

1.3. TSA TABLE 6: ECONOMIC IMPORTANCE OF TOURISM IN THE FLEMISH REGION IN 2008

TSA Table 6 combines the information from the previous TSA Tables. In addition, we enter information here on imports and take into consideration taxes, subsidies and trade and transport margins in order to make the transition between the supply at basic prices and consumption at purchase prices. By linking the total supply of a particular product (calculated in TSA Table 5) to the total tourism consumption of this product (collected in TSA Table 4), the **tourism ratios per product** are calculated. By then applying these ratios to the supply data in each branch of activity, we can calculate the size of the share of the output consumed by tourists in a particular sector. This is referred to as the **tourism share of the supply**.

To calculate the **Tourism Direct Gross Value Added**, we must calculate the tourism share of the intermediate consumption and the value added based on the tourism share of the supply. By adding up the tourism share in the value added of all branches of activity, we finally arrive at the value added of tourism in the Flemish economy. Therefore, the Tourism Direct Gross Value Added includes the valued added of both tourism-related as well as other branches of activity, but only for the share of the value added that is also actually purchased by tourists in these sectors. Whatever is not consumed by tourists is disregarded, even if this was produced by a tourism-related branch of activity.

Another way of measuring the importance of tourism for the economy is by using the **Gross Value Added of tourism industries**. This indicator includes the value added generated by the tourism industry, regardless of whether this supply is consumed by tourists or non-tourists. Therefore, the value added of non-tourism related branches of activity is not taken into account, although they can also supply products which are purchased by tourists.

Based on the TSA 2008 (see Table 4), we can calculate both indicators for the Flemish Region in 2008:

- The **Gross Value Added of tourism industries in the Flemish Region** can already be seen in TSA Table 5: the total value added of the output of tourism-related branches of activity accounts for **EUR 9.4 billion or 5.2% of the total Value Added in the Flemish Region in 2008**.

- In addition, the **Tourism Direct Gross Value Added in the Flemish Region** is equal to **EUR 4.1 billion or 2.3% of the total value added in the Flemish Region in 2008**. More than two-thirds of this amount, i.e. EUR 2,843,999,805, is generated as Value Added for tourism consumption in tourism-related branches of activity. The Value Added for the tourism share in non-tourism related branches of activity is equal to EUR 1,291,694,118.

Table 4: Indicators of the importance of tourism in the economy in the Flemish Region in 2008 (in euros and based on 2008 prices)

	Value added of total output = Gross Value Added of tourism industries		Value added of tourism consumption = Tourism Direct Gross Value Added	
	Absolute	Relative with respect to VA in the Flemish Region (EUR 181 billion)	Absolute	Relative with respect to VA in the Flemish Region (EUR 181 billion)
Total Flemish Economy	EUR 180.9 billion	100%	EUR 4.1 billion	**2.3%**
Tourism industries	EUR 9.4 billion	**5.2%**	EUR 2.8 billion	1.6%
Other industries	EUR 171.5 billion	94.8%	EUR 1.3 billion	0.7%

If we look at the relative importance of the various tourism industries in the total Tourism Direct Gross Value Added in the Flemish Region, we see that it is mainly the hotel and catering industry (Table 5) that is very important. This is because hotels and other accommodation account for 21% of the Value Added of tourism consumption in the tourism industry. Restaurants and cafés do even better, with a share of 27%. Passenger transport by road, rail and water represents 17% of the value added of tourism consumption in tourism-related branches of activity. Passenger transport by air accounts for a share of 13.5%, followed by the travel agencies and tour operators sector (10.4%). In addition, cultural, recreational and sports companies are responsible for over 8% of the EUR 2.9 billion of the Tourism Direct Gross Value Added generated by tourism industries.

Table 5: Tourism Direct Gross Value Added in the Flemish Region in 2008 (based on 2008 prices), by industry.

	NACE 2003	Value added of tourism consumption = Direct Gross Value Added of Tourism TOURISM INDUSTRIES EUR 2.8 billion = 100%	ALL INDUSTIRES EUR 4.1 billion = 100%
Accommodation for visitors	100% (55.1 to 55.2 incl.)	20.7%	14.2%
Accommodation related to second homes	16.71% (70)	2.9%	2.0%
Food and beverages industry	91.41% (55.3 to 55.5 incl.)	27.2%	18.7%
Road, rail and water passenger transport	88.62% (60.1 to 60.23 incl.) +13.28% (61.1) +3.82 (61.2) +85.61% (71.1 to 71.2 incl.)	17.3%	11.9%
Air passenger transport	84.44% (62)	13.5%	9.3%
Travel agencies, tour operators and guides	79.80% (63.3)	10.4%	7.1%
Cultural, recreational and sports industry	83.51% (92.3 to 92.7 incl.)	8.0%	5.5%
Other industries	All other NACE codes	Not applicable	31.2%

If we also involve the other industries, we see that non-tourism industries are responsible for 31.2% of the Tourism Direct Gross Value Added. The shares of the tourism sectors are somewhat lower now, but the mutual ratio of importance remains the same. Restaurants and cafés account for 18.7% of the total Tourism Direct Gross Value Added, while accommodation provides 14.2% of this total. Passenger transport by road, railway and water has a share of 11.9% of the Tourism Direct Gross Value Added, and passenger transport by air also accounts for a share of 9.3%. Travel agencies, tour operators and guides account for 7.1% of the Tourism Direct Gross Value Added and cultural, recreational and sports companies are responsible for 5.5%. The sector related to accommodation in second homes has a share of 2% of the total Tourism Direct Gross Value Added in the Flemish Region.

The relative importance of the various branches of activity in the total of the Gross Value Added of tourism industries is less relevant, since this indicator only takes into account production in these branches of activity and disregards consumption by tourists. We do not therefore discuss these in detail, but the figures can be derived easily from TSA Table 5, presented in Table 3 of this Summary.

2. RESULTS OF THE ESTIMATION OF THE TSA FOR THE BRUSSELS-CAPITAL REGION AND THE FLEMISH + BRUSSELS-CAPITAL REGION

After developing the TSA for the Flemish Region, we also estimated the results of a TSA for the Brussels-Capital Region. By not breaking down a large part of the information into details but including this only in an aggregate form, we were able to arrive at some numbers fairly quickly. This is the case for TSA Tables 1 and 2, which measure tourism consumption. Moreover, we did not calculate the figures to be additionally included in TSA Table 4, but estimated these on the basis of the Flemish TSA. With respect to the supply, we were able to make use of the regional IOT for the Brussels-Capital Region, which was again made available by the Federal Planning Bureau. Therefore, TSA Table 5 was completed developed and was not based on estimations. The only thing excluded is all activities of companies in the context of accommodation in second homes.

On the basis of this TSA Table 5, the **Gross Value Added of tourism industries in the Brussels-Capital Region** can be calculated. This is equal to **EUR 3.18 billion or 5.46%** of the total Gross Value Added in the Brussels-Capital Region.

When we combine these figures with the data from the TSA of the Flemish Region, we obtain the **Gross Value Added of tourism industries in both regions togheter**. This is equal to **EUR 12.6 billion or 5.27%** of the Gross Value Added in both regions (= EUR 12,599,876,663 VA of tourism industry (FlR+BCR = EUR 9.4 billion + EUR 3.2 billion) / EUR 239,137,780,884 total VA (FlR+BCR = EUR 181 billion + EUR 58 billion)). For the Flemish Region alone, we had earlier obtained a figure of EUR 9.4 billion or 5.21%.

Finally, all previously collected information was combined in TSA Table 6. In this way, we can calculate the **Tourism Direct Gross Value Added in the Brussels-Capital Region**. This is equal to **EUR 1.40 billion or 2.41%** of the total Gross Value Added in the Brussels-Capital

Region (= EUR 1,402,926,393 VA of tourism consumption in Brussels / EUR 58,274,132,634 total VA in Brussels).

When we combine these figures with the data from the TSA of the Flemish Region, we arrive at the **Tourism Direct Gross Value Added in both regions togheter**. This is equal to **EUR 5.54 billion or 2.32%** of the total Gross Value Added in both regions (= EUR 5,538,620,316 VA of tourism consumption (FlR+BCR = EUR 4.1 billion + EUR 1.4 billion) / EUR 239,137,780,884 total VA (FlR+BCR = EUR 181 billion + EUR 58 billion)). For the Flemish Region alone, we had earlier obtained a figure of EUR 4.1 billion or 2.29%.

3. BENCHMARKING OF ECONOMIC INDICATORS FOR TOURISM IN THE FLEMISH REGION AND THE BRUSSELS-CAPITAL REGION

In order to correctly estimate the above-mentioned figures and percentages, it is important to compare them with figures from other industries and other countries. Firstly, the Gross Value Added of tourism industries is discussed, followed by the Tourism Direct Gross Value Added.

3.1. GROSS VALUE ADDED OF TOURISM INDUSTRIES

The Gross Value Added of tourism industries in the Flemish Region amounts to EUR 9.4 billion or 5.2% of the total Gross Value Added in the Flemish Region. For the Brussels-Capital Region, we obtained a figure of EUR 3.2 billion or 5.5% of the total Value Added in the Brussels-Capital Region. If we add the figures from both Regions, we arrive at a total of EUR 12.6 billion of Gross Value Added of tourism industries or 5.3% of the total Gross Value Added in both regions together. We compare these percentages with the share of other industries in the Value Added in the Flemish Region and with the share of the tourism industry in the Gross Value Added in other countries.

According to the RMF, the tourism industry is defined as a group of (parts of) different industries (see Table 5). Therefore, although **comparison with other branches of activity** is possible, we need to keep in mind that the parts of these other branches of activity are sometimes included in the tourism total. Table 6 displays the share of various sectors in the total Value Added in the Flemish Region. It is immediately apparent that many sectors obtain a lower share than 5.2%. In the industries group, there are only two sectors that obtain more than 2% as a share of Value Added in the total Value Added, i.e. the food, beverages and tobacco industry obtains 2.6% and the chemicals industry 3.2%. All other industrial sectors score lower than 2. The total Value Added of the sector for the generation and distribution of electricity, gas and water (1.7%) or of the entire financial sector (2.9%) is also lower than that of the tourism sector. The share in Value Added of public administrations, defence and social security (5.1%) is comparable to that of the tourism sectors. Education (6.1%) and the construction industry (6.3%) score slightly higher than the tourism sector. The sectors whose share in the Value Added is much higher than that of tourism are often groups consisting of various larger sub-sectors. This involves all services related to the exploitation of and trade in real estate (9.7%), business services (14.4%) and wholesale and retail trade

(14.3%). If we consider all industrial sectors together (NACE codes 15 to 37 incl.), we see that this group accounts for a total share of 18.5% in the total Value Added in the Flemish Region.

Table 6: Share of the Value Added of different groups of branches of activity in the total Value Added of the Flemish economy in 2008, in %.

Branches of activity (NACE 2003)	Share VA Flemish Region 2008	
Agriculture, hunting, forestry and fishing (01+02+05)	**0.8**	
Mining and quarrying (14)	**0.0**	
Industry (15 to 37 incl.)	**18.4**	
Manufacture of food, beverages and tobacco (15+16)		2.6
Manufacture of textiles and textile products (17+18)		0.8
Manufacture of leather and leather products (19)		0.0
Wood industry and manufacture of wood products (20)		0.4
Manufacture of pulp, paper and paper products (21)		0.4
Publishing, printing and reproduction of recorded media (22)		0.9
Manufacture of coke, refined petroleum products and nuclear fuel (23)		0.8
Manufacture of chemical products (24)		3.2
Manufacture of rubber and plastic products (25)		0.9
Manufacture of other non-metallic mineral products (26)		0.7
Manufacture of basic metals (27)		1.2
Manufacture of fabricated metal products, except machinery and equipment (28)		1.7
Manufacture of machinery, equipment and tools n.e.c. (29)		1.4
Manufacture of electrical, electronic and optical equipment and tools (30 to 33 incl.)		1.3
Manufacture of transport equipment (34+35)		1.5
Manufacture of furniture, manufacturing n.e.c. (36+37)		0.6
Generation and distribution of electricity, gas, steam and water (40)	**1.7**	
Construction industry (45)	**6.3**	
Wholesale and retail trade, repair of motorcycles and household goods (50 to 52 incl.)	**14.3**	
Sale, maintenance and repair of cars and motorcycles, retail sale of automotive fuel (50)		1.8
Wholesale and commission trade, except trade in cars and motorcycles (51)		8.2
Retail trade, except in cars and motorcycles, repair of household goods (52)		4.3
Hotels and restaurants (55)	**1.6**	
Transport, storage and communication (60 to 64 incl.)	**8.3**	
Land transport, transport via pipelines, and water transport (60+61)		3
Aviation (62)		0.3
Support activities for transportation, travel agencies (63)		3.4
Post and telecommunications (64)		1.7
Financial institutions, insurance and pension funds (65 to 67 incl.)	**2.9**	
Real estate, renting and business activities (70 to 74 incl.)	**25.0**	
Exploitation of and trade in real estate (70)		9.7
Renting of movables (71)		1.0
Business services (72 to 74 incl.)[5]		14.4
Public administration and defence, compulsory social security (75)	**5.1**	
Education (80)	**6.1**	
Health and social services (85)	**7.2**	
Other community facilities, social-cultural and personal services (90 to 93 incl.)	**2.1**	
Private households with employed staff (95)	**0.2**	
Total	**100**	

SOURCE: NBB, editing SVR

[5] Business services include services related to computers, legal advice, accountants, business operations and management consulting firms, management of holding companies, architects, engineers, technical advice, advertising, employment agencies, security firms and industrial cleaning.

A second way to estimate this figure is by **looking at other countries** where a TSA has already been prepared. We must exercise a certain amount of caution in making this comparison because although the framework for the TSA has been defined in the RMF, the method used differs from country to country. However, in comparing the Gross Value Added of tourism industries, the possible differences in interpretation are not that significant. With a percentage of 5.2%, the Flemish Region has a good average and scores higher than Lithuania, Finland, Latvia and the Czech Republic. In addition, we score as strongly as Denmark, Hungary and Germany. The Brussels-Capital Region scores slightly higher, making the total for both regions somewhat higher. Countries that have an even higher share in the value added are mainly typical tourism destinations, such as Portugal, Austria, Cyprus and Spain. Estonia and Ireland also score remarkably high.

Table 7: Share of the Value Added of tourism industries in the total Value Added, calculated on the basis of TSA Table 6 in various European Member States

Countries with a complete TSA which is updated on a regular basis			**Countries where an initial pilot study of the TSA has been developed.**		
	Share of tourism industries in the Gross Value Added	Year TSA		Share of tourism industries in the Gross Value Added	Year TSA
Lithuania	2.8	2006	Latvia	4.4	2004
Finland	3.9	2001	Germany	5.2	2000
Czech Republic	4.6	2006	Flemish Region	5.2	2008
Denmark	5.2	2006	Flemish + Brussels R.	5.3	2008
Hungary	5.2	2005	Brussels C. Region	5.5	2008
Flemish Region	5.2	2008	Ireland	19.6	2000
Flemish + Brussels R.	5.3	2008	Slovakia	/	2006
Brussels-C. Region	5.5	2008	United Kingdom	/	2000
Poland	6.2	2002	Slovenia	/	2003
Portugal	8.1	2004	France	/	2005
Austria	8.2	2007			
Estonia	17.7	2004			
Cyprus	20.5	2007			
Spain	22.3	2004			
The Netherlands	/				

SOURCE: Eurostat Manual Volume 2, 2009, editing SVR

3.2. TOURISM DIRECT GROSS VALUE ADDED

The Tourism Direct Gross Value Added in the Flemish Region is equal to EUR 4.1 billion or 2.3% of the total Value Added in the Flemish Region. For the Brussels-Capital Region, we arrived at EUR 1.4 billion or 2.4% of the total Value Added in the Brussels-Capital Region. If we add the figures from both Regions, we obtain a total of EUR 5.5 billion of Tourism Direct Gross Value Added or 2.3% of the total Value Added in both regions together.

A **comparison with other sectors or branches of activity** is not meaningful for this indicator. This is because the Tourism Direct Gross Value Added only represents the part of the supply (and of the Value Added) actually consumed by tourists. For other sectors, we only have information related to the value added of the total supply. Let us take the example of the hotel and catering industry. As seen in Table 6, the Value Added of the hotel and catering industry (NACE 55) is equal to 1.6% of the total Gross Value Added in the Flemish Region. The Value Added of tourism consumption in the hotel and catering industry (as part of the Tourism Direct Gross Value Added) is equal to 0.76% of the total Gross Value Added in the Flemish Region. Hence, it would be odd to compare this last percentage with the percentages in Table 6, since this does not take into consideration the consumption aspect.

If we **compare** the Flemish and Brussels percentages **with those of other countries**, we must again make certain reservations. Since, when calculating the Tourism Direct Gross Value Added, a slight difference in method can make a big difference in the final percentage. Despite these differences, Table 8 shows that the percentages for most countries vary between 1.5% and 2.9%, with exceptions primarily for typical tourism destinations such as Cyprus (8.7%), Spain (6.5%), Austria (5.4%) and Portugal (4.6%). Estonia also scores relatively high, at 4%. The Flemish figure of 2.3% and the Brussels figure of 2.4% are close to the percentages of the Czech Republic (2.6%), Denmark (2.5%), the Netherlands (2.9%) and Sweden (2.9%). Countries with a lower share are Finland (1.8%), Poland (1.8%) and Lithuania (1.5%).

Table 8: Share of tourism in the Gross Value Added,
calculated based on TSA Table 6 in various European Member States.

Countries with a complete TSA which is updated on a regular basis.			Countries where an initial pilot study of the TSA has been developed.		
	Share of tourism in the Gross Value Added	Year TSA		Share of tourism in the Gross Value Added	Year TSA
Lithuania	1.5	2006	Slovakia	2.1	2006
Finland	1.8	2001	Flemish Region	2.3	2008
Poland	1.8	2002	Flemish + Brussels R.	2.3	2008
Flemish Region	2.3	2008	Brussels-C. Region	2.4	2008
Flemish + Brussels R.	2.3	2008	Latvia	2.6	2004
Brussels-C. Region	2.4	2008	Ireland	2.9	2000
Denmark	2.5	2006	Germany	3.2	2000
Czech Republic	2.6	2006	United Kingdom	3.8	2000
The Netherlands	2.9	2006	Slovenia	3.9	2003
Sweden	2.9*	2006	Latvia	2.6	2004
Estonia	4.0	2004	France	4*	2005
Portugal	4.6	2004			
Austria	5.4	2007			
Spain	6.5	2004			
Cyprus	8.7	2007			

*These percentages are related to the TDGDP instead of the TDGVA
SOURCE: Eurostat Manual Volume 2, 2009, p.81

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Tourism Pact 2020

STRATEGISCH BELEIDSPLAN 2020

VOOR HET TOERISME IN VLAANDEREN - BRUSSEL

STRATEGIC POLICY PLAN 2020

FOR TOURISM IN FLANDERS - BRUSSELS

The undersigned are committed to implementing the Tourism Pact, which is based on the mission, vision, priorities, strategic and operational objectives as formulated in the strategic policy plan for tourism in Flanders-Brussels. Furthermore, the undersigned are committed to monitoring this implementation as described below.

The undersigned are committed to sharing several values that should lead to a common policy: thinking from the customer's perspective rather than that of your product; better positioning not only of the sector itself but also of Flanders-Brussels as a tourist destination; adopting a macro-economic approach to tourism focusing on employment and profitability, but also on sustainability and participation; even greater professionalising of our sector and development of an innovation trajectory. And all of this through aspiring to more cooperation and complementarity.

It is the first time that a broad strategic policy plan for tourism in Flanders-Brussels is established and that tourism partners forge a pact. It is the first time that they can come together within a collective framework to share objectives that should advance the entire sector: this is a real innovation. Hundreds of organisations and thousands of entrepreneurs commit themselves on a daily basis to the development of tourism in Flanders-Brussels, both public and private and both for-profit and not-for-profit. Some organisations create the tourist offering; others engage in policymaking or implementation or defending of tourist interests. In addition, many actors that are not directly active in the tourist sector have a great impact on the development of tourism. Each of these organisations has their own background and their own dynamic.

The present pact is therefore conceived from a broad perspective. Both incoming and domestic tourism as well as outgoing tourism are part of the plan. The same goes for leisure tourism, business tourism and day tourism. More than 150 organisations were involved in the creation of this plan: Flemish, provincial and local tourism authorities, tourist sector federations and other representatives of private tourism enterprises, representatives of the meeting industry, representatives from the sector Tourism for All, other policy areas such as Education, Spatial Planning, Sport, Culture, Heritage…

All of these actors agree that tourism is an important (economic) sector, but that the tourist sector does not sufficiently join forces. At the same time all actors involved realise that they can only be effective if they assume the engagement to provide a harmonious form to the development of tourism in Flanders by working together and with the same conviction and vision. In recent years, many tourism actors have also invested in their own strategic development. This pact and the broader strategic policy plan intend to provide all these different pieces of the puzzle with a framework and to hold up the prospect that they can form an integrated whole, whose ambition and vision is directed toward 2020.

Common objectives should be ambitious, but we must also – literally – take the measure of our ambitions. Knowledge of the right key figures, knowledge sharing and acceptance of a common interpretation framework are crucial to proceed in a guiding fashion with respect to the tourism process. It is for this reason that this plan devotes much attention to the initial operational objectives, the gathering and accessibility of knowledge, insights and key figures on which to base business and policy strategy.

In the formulation of our ambitions, we should also not overlook the distribution of responsibilities and roles as they are known today. The question to which (too) much attention is typically paid is: "Who pays what?" Should efficiency and purposiveness be served in this way, this strategic plan can provide the impetus to fairer distribution of tasks in the tourism landscape in the realisation that more agreements and complementarity are needed than to date. Only then will the effectiveness of our sector increase.

A particular challenge is the promotion of our capital, Brussels. This plan makes no statements about political questions and current issues. Given that tourism is a community responsibility, as this text proceeds, we understand 'Flanders' to also include Brussels. This is not to diminish the fact that Brussels demands an exceptional effort and a different approach. The regional, national and European role of Brussels entails that ambitions that Brussels defines for itself (strong development of conference and convention tourism, doubling the number of overnight stays by 2019) are the subject of cooperation schemes that occasionally transcend the scope of this plan. Here the Government of Flanders will have to make an appropriate effort using the available instruments. Still, it is important that Brussels – both as a tourist destination and as our capital whose international reputation is a locomotive for Flanders as a whole – forms an integral part of this plan. This importance should also be apparent from actual concerted projects.

Mission

"Our mission is to contribute to the sustainable development of tourism in, to or from Flanders in view of increased economic profitability, employment and welfare."

Vision

By 2020, tourism actors **in a sustainable manner** develop tourism in Flanders into an economic **engine of growth** through greater **cooperation** and through an explicitly **customer-oriented** and **professional** approach. The tourism actors position Flanders as a strong **brand** and as a **quality** tourist **destination** in the **heart** of **Europe**.

Priorities

The priorities constitute the guiding principles on which the policy and business strategy of the tourism actors will be based in order to realise their vision of tourism in Flanders.

1. Customer-oriented approach

It is increasingly difficult to arrange the needs of the consumer into large-scale, standardised packages. The consumer wants flexibility and a tourist experience tailored to his or her needs. Tourism actors in Flanders will respond with flexibility to the ever-changing needs of their customers. In doing so, they first acquire an understanding of whom their direct and potential customers are and what needs they have. A customer-oriented approach is an important principle both for tourism actors that focus directly on the end consumer as well as for tourism actors that have other organisations as their direct client.

2. Positioning

A great many organisations play an important and active role within tourism in Flanders. In order for tourism in Flanders to continue developing efficiently and without fragmentation, tourism actors will each have to determine their added value and complementarity. Additionally, tourism actors will also make collaborative efforts in order to create a stronger profile as a sector with respect to other policy areas. In order to reinforce the positioning of Flanders as tourist destination from a marketing point of view, the tourist identity of Flanders (including all underlying destinations) is elaborated and applied.

3. Thinking macro-economically

Tourism is a sector with great macro-economic interest and with many (local) employment opportunities, also for unskilled workers. Tourism actors will make their choices in policy and business strategy starting from a macro-economic approach with a view to employment, added value, turnover… The economic importance of tourism in Flanders is also objectified in figures that demonstrate the economic impact of tourism. The economic approach of tourism starts from a holistic vision and market-based approach in which tourism actors do not lose sight of social relevance.

4. Professionalising and innovating

Tourism actors will continue to make efforts in order to grow into even more professional and innovative organisations. In particular, for the many SMEs and other small-scale actors it is not evident to achieve thorough professionalising, innovation and advancement of extensive expertise. Tourism actors combine their growing professionalising in favour of the entire tourist sector in Flanders.

5. Cooperation

Development of tourism in Flanders is determined by an exceptionally large number of actors at various policymaking levels, from various policy areas and from both the public and the private sector. Only through extensive cooperation between all these actors can tourism in Flanders develop more effectively and coherently. Tourism actors will have to continue to employ the wide involvement that was applied at the formulation of the strategic plan in the implementation thereof. Through greater cooperation, tourism actors can also weigh more heavily upon and have greater impact upon policymaking.

6. Sustainable development

With the further development of tourism in Flanders, tourism actors aim to achieve a balance between economic, ecological and socio-cultural interests. Sustainable development of tourism in Flanders implies a process of participation that leads to quality improvement which benefits all involved parties now and in future. Sustainable tourism shows respect for the capacity of tourist destinations and the local population. It furthermore guarantees a meaningful experience for a satisfied tourist. With regard to increasing attention for ecological sustainability and vacation participation, tourism actors in Flanders will have to assume their responsibility.

Strategic objectives

1. Improving the reputation and attractiveness of Flanders as a tourist destination both in Belgium and abroad.

Flanders undoubtedly has a great many tourist assets that may appeal to a varied public. Flanders is indeed not the only destination that attempts to persuade the consumer to visit. In order to strengthen the competitive position of Flanders, the tourism actors in Flanders will have to make their assets known to the consumer as much as possible and continue to invest in the attractiveness of Flanders as a tourist destination.

2. Increase the share of the tourist sector in the Flemish economy.

Tourism in Flanders constitutes an important economic sector that contributes to the welfare and well-being of Flanders. Tourism actors will enable tourism in Flanders to develop into an economic engine of growth. This presupposes that the economic impact of tourism, measured in terms of profitability, consumer spending and added value, has to grow more than the average of the Flemish economy.

3. Customer satisfaction increased by a high-quality offering

The voice of the customer is growing louder and louder and the importance of capitalising on this is ever-increasing. Tourism actors expand the offering in Flanders so that it responds to the widely divergent needs and wishes of the consumers that Flanders can and will attract. Every consumer has a right to a high-quality vacation experience.

4. Strengthen the effectiveness of the tourist sector

Cooperation increases the effectiveness of the tourist sector and ensures efficiency and gains in effectiveness. The strongly transversal nature of tourism increases the importance of an effective sector; a single common standpoint concerning tourism in Flanders will more quickly convince other policy areas to take the interests of tourism into account.

Operational objectives

1. **Gathering and gaining access to <u>knowledge, insights and key figures</u> in order to ground policy and business strategy.**

In order to be competitive within the tourist sector, tourism actors must join the knowledge economy and align with internationally oriented business developments. There is a need for policy and business strategy based on objective and correct socio-economic figures and insights. Concretely, not only must the necessary knowledge and understanding be gathered and structured, but it also should be made available to all actors through knowledge networking and knowledge platforms.

2. **Investing in the <u>attractiveness of employment and training of tourist personnel.</u>**

Many tourism actors encounter difficulties attracting sufficiently trained personnel. Furthermore, it does not seem evident to retain personnel. Therefore, tourism actors will increase the attractiveness of employment within tourism. Via targeted training and education, attuned to the needs of the sector, the general professionalism within tourism will improve. Tourism actors enter into dialogue with authorities so that they will take the needs of tourism employment into account in their policy.

3. **Creating a favourable <u>business climate.</u>**

Leverage policy, regulation, subsidy opportunities and corresponding procedures together determine the extent to which private (and public) actors can further develop into effective and strong entrepreneurial organisations. Tourism actors enter into dialogue in order to achieve optimisation and rationalisation of these instruments, which among other things should lead to administrative simplification. For this, particular attention is paid to small and medium-sized enterprises. A workable balance should be found between regulation and self-regulation by the sector.

4. **<u>Investing</u> in building up a high-quality, differentiated and innovative <u>tourist offering tailored to the needs of the consumer.</u>**

In order to enlarge the economic impact of tourism, the tourist in Flanders must find attractive products. Tourism actors develop an offering that is diverse enough to satisfy the various wants and expectations of the customer. In addition, this offering should be high-quality and sustainable, regardless of the market segment at which it aims. In the tourist sector, the saying ‘standing still is moving backwards’ applies perhaps even more than in other sectors. Therefore the tourism actors in Flanders will also invest in an innovative tourist offering.

5. **Improving <u>access to the tourist offering</u>.**

Flanders has the potential to further develop touristically by making cultural and natural resources more accessible to the tourist, among other things. Tourism actors improve this access in a sustainable manner that benefits all parties, and in so doing so keep in mind increasing digital possibilities. On balance, space available for tourism and recreation is limited. Actors in tourism and recreation should take maximum and efficient advantage of the available space, among other things by applying the principle of multiple usage of space.

6. Actively cooperate in improved physical accessibility of Flanders as a tourist destination.

The central location of Flanders in Europe and the concentration of diverse tourist assets in a limited area are assets that tourism actors will optimally utilise. Accessibility is becoming an increasingly important criterion in the consumer's choice of destination. This entails that tourism actors will have an influence on mobility policy and will defend the interests of tourism within the transportation sector. Tourism actors will also actively cooperate on (pilot) projects concerning sustainable mobility.

7. Putting Flanders on the map as a tourist destination starting from the branding strategy 'Flanders'.

One of the most significant shortcomings of Flanders as a tourist destination is the lack of a clear Flemish tourism identity and image. Tourism actors will join in the overarching branding strategy for Flanders. From there they will develop, in combination with an improved and objectified vision of tourism, an adequate marketing strategy to increase the attractiveness and reputation of Flanders tourism.

8. Reinforcement of a welcoming and professional tourist reception.

A welcoming and professional tourist reception, tailored to the visitor, is a fundamental premise for a customer-oriented approach. It includes both an appropriate welcome by individuals who are in direct contact with the tourist, as well as providing adequate information for the (potential) tourist. The actors involved reinforce and professionalise the different forms of tourist reception in its various stages.

9. Increasing participation of Flemish citizens in tourism.

Not all Flemish citizens seem (able) to put the right to tourism into practice just yet. Those who do not participate in tourism may have various reasons for this (financial reasons, personal or family reasons, no need,…). Tourism actors map out which target groups do not participate and for what reasons. Via a well-aimed approach to target groups, certain groups of Flemish non-participants will be encouraged and supported. In this way, by 2020, participation of Flemish citizens in tourism should be increased both for extended stay tourism as well as for day tourism.

Monitoring and implementation

1. Indicators

Tourism actors will monitor the implementation of every strategic objective against a set of indicators (non-exhaustive list):

	Strategic objective	Indicators	Source
1.	Improving the reputation and attractiveness of Flanders as a tourist destination both in Belgium and abroad.	- Nation Brand Index *(absolute tourism score)* - arrivals - nights stayed - number of visitors to attractions - panel research - AVE *(Advertising Value Equivalent)*	- Simon Anholt - Tourism in Figures - Tourism in Figures - TVL - TVL - TVL
2.	Increasing the share of the tourist sector in the Flemish economy.	- Turnover - Investments - Profitability *(as soon as available)* - number of jobs - number of tourism enterprises - added value of tourism *(as soon as available)*	- VRIND wrt ADSEI - VRIND wrt ADSEI - SVR - RSZ and RSVZ - RSZ and RZVZ - SVR
3.	Customer satisfaction increased by a high-quality offering	- Customer satisfaction - vacation participation	- TVL and all concerned actors - WES
4.	Strengthening the effectiveness of the tourist sector	- Number of cooperation initiatives – Reflection of strategic policy plan for tourism in Flanders in business and policy plans	- TVL - TVL

2. States General

At an annual States General, all tourism actors will report upon and discuss the implementation of the strategic policy plan for tourism in Flanders. Tourism actors report about their previous year's contributions to the realisation of the formulated objectives. In addition, they present the projects that they plan to launch in the coming year for implementing the strategic policy plan for tourism in Flanders.

3. Advisory Committee

The Advisory Committee of Tourism Flanders has been given the task of monitoring and guiding several times per year the implementation of the strategic policy plan for tourism in Flanders. The

Advisory Committee presents the state of affairs in the implementation of the strategic policy plan at the annual States General.

The Advisory Committee will elaborate a projects list for implementation of the operational objectives. For each project, the initiator and stakeholders are identified, as well as the concrete results to achieve, timeline and application area (incoming, domestic, outgoing).

The initiators of these projects work out a concrete project plan in cooperation with the specified stakeholders.

The Advisory Committee can conclude achieved projects or give them a follow-up. New projects can also be started up depending on the estimation of the Advisory Committee. This gives rise to a rolling system that leaves space for new ideas and growing understanding.

The agency Tourism Flanders-Brussels assures a supportive framework for the Advisory Committee so that it can optimally fulfil its role as guide in the implementation of the Tourism Pact.

4. Interim evaluation

In 2014 the Flemish Department of Foreign Affairs makes an interim evaluation of the strategic policy plan for tourism in Flanders. The Advisory Committee presents this evaluation at the annual States General.

Abbreviations used	
TVL	*Tourism Flanders*
VRIND	*Flemish Regional Indicators*
ADSEI	*General Directorate of Statistics and Economic Information*
SVR	*Research Centre of the Government of Flanders*
RSZ	*National Social Security Office*
RSVZ	*The National Institute for the Social Security of the Self-employed*