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## **TOURISM AND EMPLOYMENT**

- Follow-up given to the Council Conclusions of 21 June 1999 -

FINAL REPORT OF WORKING GROUP E

### **Managing the impact and the use of “Information and Communication Technologies based services” in the tourism sector**

JUNE 2001

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## EXECUTIVE SUMMARY

In order to identify the Information and Communication Technologies (ICT) based Services with a major relevance for public and private stakeholders in tourism, the working group agreed on the following common definition of ICT based services:

*“ICT based services” refers to the use of digital electronic methods and tools to gather, process, share and distribute information throughout the tourism value chain. Digital electronic methods and tools can be software applications and components, data, formal specifications, standards or devices supporting a specific set of tourism related business processes”.*

Three categories of services were identified as having a major impact on the tourism sector: development of networking facilities, interoperability and systems integration, and finally a new set of applications for enterprise management and electronic commerce.

The assessment of the awareness, accessibility and use of these services by the different tourism stakeholders has shown that tourism stakeholders are using ICT differently, based on main factors, such as their core competence, their size and their relative position in the tourism value chain. The level of awareness and access also differs by type of stakeholder (traditional distribution channels, accommodation services, consumers, destination management organisations, tourism administration and transport).

Strategies and supporting measures at European, national or regional level do exist. Access to the relevant information, in particular for SMEs, was perceived as the main bottleneck for the tourism actors to benefit from them (e.g., IST programme, measures under regional policy, actions under e-Europe like Go digital).

Three types of gaps with regard to strategies and measures have been specified. The first group refers to the need to accelerate the legal and fiscal harmonisation at European level, in relation with the others relevant actors, as a mean towards a stable legal framework worldwide. The second group refers to the insufficient priority given to the development of content and the inadequate access to information, at all levels. The third group refers to the need for innovative approaches and solutions for SMEs to fully integrate them into the world of ICT based technologies.

The following recommendations for actions have been set up:

1. Establish a **European knowledge network for e-Tourism**, giving access to relevant information and knowledge on a widespread platform and based on existing European, national and regional centres. They will act as **review/knowledge centres**, close enough to the different tourism stakeholders to facilitate the access to and collection of tourism information. It will provide the necessary know-how for the adoption of ICT based services by the tourism stakeholders, in particular for SMEs.
2. Set up **2 special interest Working Groups** for urgent issues. The first one on **“mobile e-Commerce services for tourism”** should evaluate the need for new innovative mobile services and propose measures for their development and use. The second one on **“assessing existing legislation & tax regulations”** with regard to its application in a digital tourism environment.
3. Establishing a Support Centre to enhance market integration for SMEs and destinations through Destination Management Systems and services for SMEs.

## 1. INTRODUCTION

The Commission, as a result of the recommendations presented in the interim reports from the working groups on Tourism and employment, after the discussions in the Tourism Advisory Committee and during the inter ministerial seminar in Lille (22 November 2001), decided to create Working Group E. The objective was to analyse the questions related to **“managing the impact and use of Information and Communication Technologies based services in Tourism”**.

Working Group E inherited a number of open questions going beyond the mandate of the four other Working Groups, especially from Working Group A. During the four meetings of Working Group E, the discussion followed the order of the five items of the mandate. It is also the structure used for this report.

The first question was the need to understand what are ICT (Information and Communication Technologies) based services for tourism and their impact on the way tourism products and services are managed, promoted, distributed and sold. Chapter 2 of this report aims to provide an answer to this question.

The second item of the mandate (chapter 3 of the report) stressed the need to assess to what extent the different tourism stakeholders are aware of the new digital environment and how they react to it. On this specific point, it was clear to the experts that different tourism actors are at different stages of ICT adoption, depending mainly on their core competence, size or on their position in the tourism value chain. The analysis in chapter 3 tries to identify major threats and opportunities for each of them and to clarify the impact at tourism enterprise and activity levels.

Chapter 4 corresponds to the third item of the mandate. The Working Group has identified emerging strategies from the different players for improving the adoption, and taking full advantage of, the new opportunities. This part of the report was basically centred on National Tourism Administration programmes and Community activities affecting the sector. The contributions received showed that there is a deficit of communication. The dialogue with a larger number of players, namely regions, national and regional trade associations, research centres, and big players (new and traditional) aiming at facilitating access to basic information and supporting measures, in particular for SME's, needs to be intensified.

The gaps with regard to such policies, strategies and measures, the fourth item of the mandate (chapter 5 of this report), were analysed at different levels. The first level refers to basic conditions for ICT adoption (infrastructures for basic services and legal framework), the second to subjective requirements (awareness, training and dissemination of best practices) and the third to the market integration perspective.

Finally, chapter 6 proposes three action lines to bridge the identified gaps. Behind the implicit prioritisation reflected in the choice of the group there is a real danger for European tourism competitiveness of an uneven adoption of ICT based services by the sector – the digital divide. Co-operation is the only way to overcome the challenges of the digital revolution for the tourism sector.

The report is based on expert contributions and presentations made by services of the European Commission in charge of policies affecting tourism activities. These policies and actions include in particular, the Go Digital initiative (part of the e-Europe framework), IDA

(Interchange of Data between Administration), Innovative actions from the Directorate General for Regional Policy and the 5<sup>th</sup> Framework Programme (from Directorates General Information Society and Research). The participation of experts from European trade associations and trade unions brought a new dynamic to the discussion and considerably enlarged the richness of the contributions.

A special mention should be made of the publication of the European Information Technology Observatory 2001 (EITO 2001), from which we have extensively used the results of the tourism sector analysis.

## **2. IDENTIFY THE INFORMATION AND COMMUNICATION TECHNOLOGIES BASED SERVICES WITH A MAJOR RELEVANCE FOR PUBLIC AND PRIVATE STAKEHOLDERS IN TOURISM, NOTABLY SMES.**

### **2.1. ICT based service – definition**

In order to identify more precisely the scope of the analysis, the meaning of **ICT based services for tourism** was discussed. From the contribution received, the group agreed on the following common definition aimed at including all ICT related processes affecting tourism activities:

*Information & Communication Technology based Services refer to the use of digital electronic methods and tools to gather, process, share and distribute information throughout the tourism value chain. Digital electronic methods and tools can be software applications and components, data, formal specifications, standards or devices supporting a specific set of tourism related business processes.*

### **2.2. Enabling technologies and Services**

Tourism is not an exception to the global business environment. Major technology developments affecting business performance in general (bandwidth, object programming, distributed architectures, XML, Intelligent agents, wireless communications) are changing the business in the tourism sector as well.

The following key technologies, enabling the emergence of new tourism business concepts and contributing to the improvement of the efficiency and effectiveness of existing ones, were identified.

The main current driver is the development of networking facilities. Three aspects are particularly important for tourism:

- Bandwidth growth: the emergence of broadband networks allows access to multimedia information (image, sound, and text) in real time. This is of major importance in this specific sector where customer decision to select a specific destination is based on the quality of the information available to prepare his trip. Since a tourism product is consumed at the destination, there is no possibility to experience any service before the trip. Images (static and video) and detailed/ customised information have a decisive influence on customers perception of the quality of the product.

- Wireless communications: wireless Internet access makes it possible to reach clients at any time, anywhere and through different devices, before, during and after the travel experience. From the more widespread basic services (SMS Messaging) to the more sophisticated protocols (WAP, GPRS and UMTS), a new range of opportunities is available to interact with clients and business partners.
- Security & Privacy: being a key success factor to building commercial relationships, trust is based on security applications performance. The recent development of new encryption algorithms, the expansion of authentication services based on PKI (Public Key Infrastructure), the definition of secure payment processes (SET) are basic requirements to improve electronic commerce and will remain as an important challenge. Another important issue for the improvement of trust is personal data protection. The European legal framework for electronic commerce seems to answer to this requirement. Unfortunately, there is insufficient awareness among customers of this subject.

The second technological domain affecting tourism business development is interoperability and systems integration. The interoperability process includes data and ICT application levels, and requires the creation of an environment transparent to the technology used and a shared conceptual representation of data and processes.

- XML, the *lingua franca*: the adoption of this Internet standard produced an enormous impact on the entire business environment. The ability to transfer comprehensive data between different applications and platforms brought new perspectives to business integration, enabling machines to talk to each other in a meaningful way. This new Internet based approach to data interoperability, easy to implement and affordable for virtually any business, reveals enormous potential, especially for a horizontal sector such as tourism. There, different activities and types of companies coexist and interact. Traditional standardisation processes were applied with high costs and limited results.
- In a more indirect way, the new programming paradigms (e.g. object-oriented software engineering processes; distributed computing) improve software reliability, cost/effectiveness and performance as well as the capacity to deal with complex applications such as tourism product design and integration. A special reference should be made to the Open Source model, a new approach to software distribution suitable for improving software quality and for facilitating and strengthening potential collaboration between a range of tourism actors.

The most visible level of the ICT impact on tourism is, however, the application domain. A complete new set of applications was implemented during the past few years dealing with enterprises internal and external integration with business partners and customers, data management and distribution and electronic commerce:

- ERP (Enterprise Resources Planning) applications brought global coherence to the internal information systems. Operations and support applications were integrated and based on common system architecture, allowing different sectors of the organisation to manage and exploit information resources more rationally.

- Specific applications were developed to support external relations both with business partners (e-Procurement, e-Marketplaces, Private Exchanges) and with customers (e-CRM – Customer relationship management), initiating a new marketing era.
- Advanced and powerful applications were also developed to support information management and distribution, providing a structure suitable for the conversion of existing information and facilitation of communication inside an organisation (Intranet) and with the external world (Web Publishing), managed in user-friendly environments.
- In addition, several application components (services) were integrated to enable electronic ordering and purchasing. Software for electronic catalogues, secure transaction environments, and new business models were assembled in innovative packages to sell on the web (e.g., auction, reverse auction).

### **2.3. Tourism Services**

The tourism sector has been very active in all this turmoil, with special interest being paid in businesses to consumer solutions. Taking advantage of the new opportunities, web travel and tourism services exploded. Direct relations with customers, increased margins, and global reach were some of the basic motivations behind the involvement of the sector in the new economy. The globalisation process was streamlining the competition and web presence became a clear competitive advantage. It was mainly the big players, those who already had expensive database systems in place who invested in the new structure, but most of the existing systems remained unchanged. The fragmented structure of the sector (95% of tourism enterprises in Europe are small or very small) was one of the factors contributing to the shallowness of the process.

Tourism services were, in a first phase, consumer centred: a reduction of the number of intermediaries for a direct access to clients was at the centre of the emerging Internet strategies. The vast majority of the tourism services identified deal with marketing, sales, and customer relations. They left untouched the business model behind these processes. The major consequence of this customer-centric approach was that basic requirements for accessing the electronic market remained unchanged.

*Start-up companies*, taking full advantage of the technology, developed new innovative business models: last minute opportunities, reverse auctions and special interest programmes are good examples of these new web based services. Some companies survived either by focusing on niche markets or by integrating powerful travel portals and improving their service level.

The main investments were made by *airline companies*, *GDS* (Global Distribution System) and, later, by *tour operators*.

Airlines initially launched the web auction to maximise seat occupation on their regular flights. Following the positive reaction of customers they enlarged on-line sales to their full operations. Sales cost reduction became particularly important in the competitive environment after the liberalisation of the sector. Electronic ticketing gave a new breath to Internet sales and is becoming one of the most successful e-commerce travel services.

GDS started to sell web services using their large databases through specific web portals. Customers could find airline seats, hotel rooms or rent a car. Some additional travel information, such as weather forecasts or destination information, was also available. Additional services were progressively integrated (geo-reference, personalization, email, newsletters and alerts) making extensive use of the most advanced technologies such as data warehousing and data mining to manage user information.

*Accommodation* started to use booking services, rarely on-line, and more often using basic email requests and fax confirmation, usually through intermediaries. More recently, hotel chains have joined this movement and started to integrate their inventories for direct booking, relations with the customer and integration with distribution channels.

Independently of these market movements, *Destination Management Organisations* (DMO) have understood the importance of the ongoing digital revolution and started their own independent process towards electronic marketing.

The most significant asset of Destinations was (and remains) the brand, inherent from the region or country name, perceived by customers. Destinations are in a unique position to facilitate the integration of their resources (cultural and natural resources, tourism and support services) into an attractive package for visitors. For a large number of small and medium size enterprises, Destination web sites have become the most cost/effective solution to accessing the Internet and achieving global visibility. In the most successful developments, reservation and payment tools were made available, creating an alternative commercialisation channel for companies.

Internet, and particularly the web, challenged DMO to maintain full control of Destination image. In some cases, the isolated initiative of web enthusiasts publishing destination information, travel journals and other travel-related information encouraged them to extend their marketing activity to the new media. Promotional brochures were transferred to the web and in a second phase, basic interaction via email started to raise awareness on customer retention and direct marketing possibilities.

The modular combinations of a comprehensive set of tools to facilitate management and destination marketing of services generated Destination Management Systems (DMS). DMS reach their maturity in some leading destinations and are ready to deploy off-the-shelf modular solutions.

#### **2.4. Research Agenda and future developments**

It is very difficult to foresee the precise road map for evolution in the near future. However, ongoing research and development projects hint at a possible scenario for the development of new services. Major players started to deploy e-procurement services, integrating main suppliers in the supply chain (Hotel chains, air transport suppliers). At the other end of the value chain, new e-CRM (Customer Relationship Management) models tend to support all customer relation processes on a single platform joining and managing in a consistent framework the traditional and the on-line channels.

This tendency is supported by technology trends towards generic platforms, based on open standards, independent from applications and able to exchange and co-operate through network and carrier layers of the ICT infrastructure. New business models emerging from this technological environment are not exclusively customer centric. B2B (business-to-business)

solutions based on private exchanges and e-marketplaces are improving business efficiency. The drivers of this evolution are not only cost reduction but also factors like quality of services, time to market, market enlargement through multi channel distribution and product customisation.

Some reference cases can easily demonstrate the barriers to the development of B2B services: lack of standards, investment required for internal and external systems integration or even limited internal process integration. Once again, only large companies and specific processes are able to take advantage of the new services. E-procurement for the hotel industry requires a significant number of large hotel units to reach critical mass. Supply chain integration in the air transport sector can benefit from the small number of big suppliers to fully integrate the value chain.

*The new mobile GSM infrastructure* with high penetration rates, especially in Europe, emphasised the need to develop new value added services. Travel information services, positioning services, location based information delivery, travel services on the move, traffic and delay alerts, check-in and check-out procedures through mobile devices are new fields of research and development. Telecom operators, the software industry and tourism players must co-operate for the success of these new services. WAP services and the coming GPRS and UMTS, despite some uncertainty about their effective deployment, are expected to produce a new revolution not only in the B2C relation but also in B2B.

First experiments in the use of *Interactive Digital TV* have started all over Europe. This new broadband interactive media, distributed by cable and satellite, requires rich multimedia content and services. Tourism, with the high level of content generated, can be one of the key areas for its development. New interfaces, new business models and seamless integration of information resources and systems will challenge research in the next 5 years. The high penetration of cable infrastructure, especially in urban areas, will help to seize the opportunity.

### **3. ASSESS THE AWARENESS, ACCESSIBILITY AND USE OF THESE SERVICES BY THE DIFFERENT TOURISM STAKEHOLDERS. THEIR PRESENT AND LIKELY IMPACT ON EUROPEAN TOURISM AND TOURISM ENTERPRISE ACTIVITIES AND ON THEIR RESPECTIVE STRUCTURE, PERFORMANCE AND COMPETITIVENESS LEVELS.**

The late modernisation of the economy may result in the risk of losing competitive position. This has been pointed out during the debate on the new e-Economy. Tourism Authorities, Governments and private tourism players must work together to facilitate the adoption of new technology by the whole European tourism sector. Europe still lags behind the United States in technology use except in some particular areas such as mobile communications. Recent experience in a number of different sectors shows how co-operation, at the European level, can contribute to reaching a leading position.

The intensive use of information in the tourism industry and the wide diversity and location of the actors provide a perfect match between tourism and the use of ICT technologies. Promoting their use in the tourism sector would boost the deployment of the Information Society in Europe. In addition, the indirect effect of tourism activities in European society and

the economy, particularly in the fields of employment, sustainable development, cohesion and regional development, is generating synergies with other economic sectors and policies.

To ensure a smooth transition from the traditional business to the new networked economy, and to avoid internal tensions and disruption, stakeholders must understand the deep nature of the transformations occurring and measure its impact. The globalisation of the phenomenon does not allow most of tourism stakeholders to limit their activities at the national level.

### **3.1. The Digital Fracture**

The major risk emerging from this new context is digital exclusion. It is essential to understand that Internet adoption does not simply mean to be connected. To take full advantage of the opportunity, each tourism actor needs to integrate ICT based services into his business and environment.

Small and medium size enterprises remain sceptical in relation to Internet adoption. A lack of skills and resources is the main reason for the resistance felt in almost all European countries. Despite this fact, a growing number of SME are, or have planned to be, connected. Ranging from 70% in the leading regions to 45% in the less developed areas, the sector is reacting only slowly and partially.

In most cases, connection is not combined with real changes in the business structure, neither in internal processes nor in relations with external actors (customers or other businesses). This trend can generate a serious fracture among the tourism actors.

### **3.2. Re-grouping the stakeholders**

The impact of the digital revolution on each tourism sector stakeholder depends on a few basic factors: core competence, size and relative position in the tourism value chain. Direct communication between customers and suppliers, transparency of the market and low barriers to entry are producing dramatic changes in the value chain.

**The traditional distribution channel** was the first to feel the threat. The possibility of direct contact between suppliers (hotel and transport) and customers, sometimes mediated by new information brokers, generated some panic in the travel agency sector and endangered a substantial part of their revenues coming from intermediation activities (air tickets and hotel reservations). The on going vertical concentration process in the sector relieved pressure on the retailing networks owned by big tour operators but left independent agencies exposed.

Reacting to this challenge, the leading companies started to convert the threat into an opportunity, using the Internet to improve knowledge, communication with clients and quality of services.

In general, these changes tend to reinforce the role of travel agents as travel advisors and product integrators. This new strategy gave room for customised services (e.g. more personalised services such as paying bills or providing assistance with pets during the absence of the client). Another strategy used to avoid loss of competitiveness was to focus on a particular market segment or specific sets of products. The delay in the deployment of e-commerce in the European tourism sector is giving more time to travel agents for market repositioning.

Meanwhile the business of the large tour operators continued to grow and they remained competitive due to the large scale of their operations and the compression of margins allowed by vertical concentration. However, in this sector too, the strategy is changing.

The share of Internet sales is progressing, giving to integration of internal operations and customer relations the more critical role of ensuring business performance. Efficient management of relations with suppliers (on-line allotment management), diversification of distribution channels (IDTV, travel portals, mobile services) as well as time to market (last minute offers) emphasises the need for a rapid evolution of tour operators' information systems.

On the supply side, booking on-line for **accommodation services** remains inefficient. The offer on the Internet is based on an allotment system (fragmentation of the offer between the Internet, travel agencies and direct booking) without any link to the global inventory management system. It fails to take full advantage of the potential benefits.

Price policies are not always transparent and the customer is not sure of obtaining the best rates (or at least the same rates) using the Internet rather than another off-line channel. Special discounts for on-line reservation (which is a key motivation for customers), corporate rates or special conditions from travel agents are not usually considered.

Despite the fact that Internet sales currently represent an average of 5% of total sales, hotel managers evaluate the impact of Internet as 8% of total sales. This difference comes from customers getting information from hotel web sites on the net and then using traditional means to book and pay.

For small and micro enterprises using third party services, the situation is much more difficult. It is mainly due to the cost (fees to be paid) and the heavy management effort required (connection to maintain up to date information, frequently to more than one web platform).

The successful experience shows the importance of combining off-line and on-line strategy in a single and coherent approach. To achieve this objective, hotels need to integrate inventory management, and commercial activities in a single IT infrastructure, able to deal with multiple distribution channels and maximise benefits.

The development of this process requires IT investment (applications), specialised skills (ICT and management) and business processes improvement (re-engineering). Large hotel groups with solid brands can reach the critical mass required for a cost-effective investment in systems integration. Smaller independent players have to co-operate to achieve this goal. They have neither the ICT skills nor the financial resources to support the required investment.

Different forms of partnership can help SMEs to overcome these difficulties: co-operation at destination level (local and regional) or around common specific objectives (e.g. European rural tourism networks, "Relais et Chateaux"). The essential requirements for a successful alliance are adequate size, a common brand representing a common value proposal, a common multiple channel distribution strategy and a shared ICT solution.

**Consumers** (final users of tourism services and products) and their purchasing behaviour plays a determinant role. The continuous growth of Internet users (each citizen is potentially a

tourist) and the diversification of access to the Internet are the leading forces in shifting tourists to the digital media.

The new environment contributes to re-balancing the power of consumers in their relations with the tourism industry. Travellers are becoming more informed and experienced. Direct access to suppliers and destination information, availability of the service 24 hours a day and 7 days a week, the possibility of comparing prices and capacity to personalise travel packages are the most important changes affecting their behaviour.

Soon, the experienced traveller will expect real-time, easy-to-use services to assist him before (planning), and during, the trip independently of his location or his means of communication. Particular tourism market segments such as business travel will require the seamless integration of those services (directly or through e-marketplaces) maximising the advantages of on-line travel procurement and management.

Trust & security, adequacy (cost and quality) of the available services and user-friendliness are the main barriers to generalised use of e-commerce by tourists. They are the challenges for ICT and tourism enterprises.

**Destination Management Organisations (DMO)**, usually combining public and private interests at national, regional or local level, are particularly well positioned to play an important role. Privileged access to supply chain actors and in-depth local market knowledge, responsibility for making good use of natural, cultural resources and image, and locally customised operational structures are their major assets.

The situation varies depending on the tourism destination. The structure of the local tourism market, the weight of tourism in the local or national economy, legal constraints, the level of awareness of new technologies all produce a wide diversity of Destination Management systems. They vary from static web sites, difficult to access, to complex integrated information systems covering the whole breadth of tourism activities.

ETC (European Travel Commission), one of the pan-European co-operation organisations, brings together 30 National Tourism Boards. Activities are focussed on the promotion of Europe overseas as a tourism destination. Two years ago, a “new media and IT” working group was set up to facilitate the exchange of information and experience in the use of new technologies and to support common IT initiatives. It addresses the challenge of adapting European destination management structures to the new technological environment.

Specific solutions to enable e-commerce for SMEs, integration of local/regional/national databases and services, information quality assurance, seamless integration with distribution channels: these are the kind of problems DMO are facing.

Destination brands and image, openness of destination databases and a trustworthy relationship with local public and private tourism actors transformed Destination web sites into one of the most convenient way of assuring small and medium size enterprises’ visibility on the web. The quality, accessibility and cost effectiveness of traditional promotion tools such as brochures can be significantly improved through the use of ICT tools and services.

A set of common issues is stimulating the co-operation between DMO. There is no unique solution to those problems but the exchange of knowledge and experience can help to avoid mistakes, speed up the take-up process and disseminate best practice.

**The transport sector**, in particular **air transport**, is an early adopter of new technologies. Existing information systems allowed airline companies to deploy fast e-business solutions, ranging from simple ticket sales to customer loyalty programmes and integrated company management. Direct Internet sales represent a growing share of their global revenues and contribute significantly to price reduction.

Airline companies' web sites concentrate the largest share of travel e-commerce, with a fast growing performance. Service tends to better meet customer needs: Internet booking, WAP and self-service check-in and real-time flight delay information. Due to the particularities of the European travel market, the impact of this process on the European Travel Agents' business was not as significant as in the United States. However, commission cuts and direct sales are irreversible processes.

Using their customer privileged access, air carriers started to use their Internet channels to sell other travel services (accommodation, car rental), changing their role in the tourism value chain and giving them an important place as info-mediators. Recent collaborative initiatives between some of the most important airline companies, through a single travel web portal, confirmed the capacity of the sector to adapt to the new forms of co-operation required by the digital economy.

**Railway** companies and the new generation of high-speed trains connecting major European cities (usually from city-centre to city-centre) have an increasing role in European tourism. Transport capacity, increased convenience and reduced environmental impacts are key success factors. For most itineraries, it is now possible to plan, book and purchase trips on-line. Nevertheless the air transport sector is still far from global networked system integration.

Intelligent services allowing multi-modal travel solutions, combining different transport modes according to customer priorities (price or time or any other criteria), are much too limited. As in other services domain, rail transport providers are challenged to provide friendly services to the customer and no longer just transport.

**Tourism Administration** plays an important role in supporting ICT based services deployment and using them to improve information and process management.

European, national, regional and local tourism administrations must contribute to show the way ahead by encouraging, in particular, the availability of the necessary ICT infrastructure and skilled human resources and the financial and legal environment. The IDA programme can and should be used for that purpose.

Tourism administrations must also adapt their operational and management structure to benefit from the potential of new ICT technologies. This should lead to an improve communication and dialogue with tourism stakeholders, simplify administrative procedures and stimulate the use of the Internet in the sector.

The operational availability of these new administrative e-procedures will create the need for new services, such as real-time services, computer aided decision support systems or distance learning.

The digital revolution has generated **new types of enterprises** for the net economy. The tourism sector is no exception. Companies, small or large, dealing with critical ICT resources for using the net (telecommunications, software and media) grew very rapidly. A number of

these disappeared, but the most successful ones were those built on strong alliances with the tourism players.

The basic entrance strategy was to put together technology expertise with reliable information and content providers. The most successful companies in the sector relied on GDS and CRS databases and operate at a global level. The modular integration of new services (by in-house development, strategic alliances or acquisition of smaller operators) ensured a high level of concentration in the sector. The creation of travel portals led e-business development in the tourism sector in parallel with airline web sites.

Auctions, reverse auctions, best fares tracking, cross and up selling with a very aggressive marketing strategy assured the very strong position of these companies in the e-business scenario.

The top ten companies are American. Some of them are starting operations in Europe and will certainly bring more competition to the sector. Smaller players are restricted to niche and/or national markets, taking advantage of linguistic or market peculiarities.

### **3.3. Raising awareness**

One of the basic conditions for the sustainable growth of e-business in Europe is the understanding of the real dimension of the opportunities by the sector, especially the small and medium enterprises.

Several initiatives were reported by national experts, some specific to the sector, others integrated in general e-commerce awareness initiatives. Workshops, road shows, and seminars, are frequently promoted by Trade Associations, Tourism Authorities, and regions, with the objective of raising awareness on the advantages of ICT based services in the tourism sector.

The most successful initiatives seem to be those providing a continuous information and support, such as EC3 (E-Commerce Competence Centre) in Austria, combining research and industry expertise with the core competence to assist project deployment.

Basic limitations of the sector in this field are a lack of skills, limited strategic vision, pressure from the day-to-day operation, and difficulties dealing with technology providers.

To assure a long-term solution to the problem, we must ensure the availability of appropriate educational curricula to future tourism managers, and start to integrate ICT in all tourism education domains.

IFITT –The International Federation for Information Technology and Tourism, launched a consistent debate on IT curricula for the Tourism Industry and some of the outcomes of these discussions are now integrated in a post-graduate programme developed by the University of Surrey.

However, we cannot wait for the next generation of tourism managers to solve the problem. A holistic approach is needed, covering all aspects of human resources, education, and training at different levels, plus consultancy and research in a common framework.

Concepts like Learning Areas (developed in Working Group B report), Excellence networks (demonstration) and Competence centres (Austrian Experience) can be generalised in Europe and connected in a network to facilitate the exchange of information and resource sharing.

Working Group B final conclusions about the implementation of the Learning Area concept can open up additional perspectives on this specific subject.

### **3.4. Measuring the impact and the adoption**

In order to assess the real situation in the sector and the impact of the measures undertaken, the stakeholders need to measure different dimensions of the phenomenon. A considerable number of studies and surveys are being developed at sectorial and national levels.

The main indicators considered in these studies refer to two particular domains, market and adoption. The market measurement is considered at three levels: Internet penetration, demographics travel purchasing behaviour and market value. The measurement of adoption considers the Internet presence in the sector, basically through web presence and the Internet services used by tourism companies.

For all of these sectors, sources are well identified: national statistics, sample surveys and consultancy studies, with special reference to the European Internet Travel Monitor, an annual analysis of the market shared by a large number of National Tourism Boards.

Some innovative services like Netscope, an Internet based market information service for National Tourism Boards initiated by the British Tourist Authority and now transferred to the ETC, provide interesting online information and dynamic graphics generation about Internet penetration in the European and the main international outbound markets.

A common set of indicators and a methodological approach between the initiatives could produce a qualitative improvement on the result. Co-ordination at European level with EUROSTAT and the assessment of the e-Europe initiative is another co-operation domain suited to producing interesting results and avoiding duplication of effort.

The existing information about the adoption of ICT in the sector is clearly insufficient. Analyses are too superficial and based on web presence. New indicators and case studies are needed to better understand whether and how Internet presence affects the business process.

## **4. IDENTIFY RELEVANT STRATEGIES AND MEASURES, AT COMMUNITY, NATIONAL, REGIONAL AND LOCAL LEVELS, AS WELL AS THOSE USED BY OTHER MAJOR PLAYERS FOR SEIZING THE OPPORTUNITY AND MANAGING THE IMPACT AND USE OF THESE SERVICES AMONG TOURISM STAKEHOLDERS.**

Different initiatives at European level can affect the ICT environment in the Tourism domain. The most relevant are the **IST programme** managed by DG Information Society and the city of tomorrow and cultural heritage programme by DG Research (5<sup>th</sup> Framework Programme).

Launched in 1999, the IST programme contains, for the first time, an action line for “Systems and Services for Tourism”. There are now 12 projects under development, and two supporting measures, for the interoperability of data and applications.

The 12 projects are developing new added value services for tourism, most of them dealing with the provision of personalised information delivery through mobile devices, integrating intelligent agents, mobile communications, location services and e-commerce.

FETISH (Federated European Tourism Information Services Harmonisation) develops a common framework for the seamless integration of services and information systems. It allows members of the Federation to interface with available services and recombine them according to their needs at a given time.

HARMONISE selected from the last call, will start in July. It will deliver a knowledge base of tourism ICT standards and develop mapping tools to allow interoperability between different standards.

DG Information Society is implementing a cluster approach to tourism-related projects, ensuring co-operation and information dissemination between them and with the tourism industry.

The Innovation programme from DG Regional Policy is not a tourism specific initiative. However, it provides an opportunity for regions to submit tourism-related projects. The programme is just starting and the dialogue with regional authorities can help the alignment of local and regional innovation actions with the European framework for ICT development in tourism.

IDA (Interchange Data Administration) supports co-operation at the administration level. This programme offers the chance to implement common data formats and applications to support information sharing amongst administrations at all levels. Some of the suggestions resulting from the different working groups can be submitted to this programme. Shared development efforts can be made available to all member states in an Open Source model.

One of the five sectors of intervention of the EUMEDIS, **initiative** for development of the Euro-Mediterranean Information Society, specifically designed to reduce the informational and technological gap is "**Tourism and Cultural Heritage**". In this sector the objective is *"The creation of a federation of specialised webs of "Tourism and Culture-related" Internet hosts. These projects will imply the interconnection of major national and regional tourism and cultural sites with national administration sites with the view to promoting the tourism sector and the national cultural heritage"*. The first cluster of 4 projects is expected to start in Autumn 2001.

Some instruments, such as EUREKA and COST are already in place. EUREKA, with 29 Members and the European Union, is a bottom-up initiative, with a decentralised management and market-oriented scheme. Its objective is to support and contribute to the competitiveness of European companies, namely SMEs, in creating business links and networks of innovation for industrial research and development. The co-ordination between European Commission and EUREKA will be strengthened within the context of the European Research Area. Under the current Spanish Chairmanship an umbrella project EUROTURISM has been launched. It addresses the development of advanced technologies in the tourism, leisure and culture industries, with particular focus in the following fields: sustainability; working process, knowledge & human resource management, future products, establishments and services, information, services and e-commerce, destination and infrastructure management, cultural heritage and new business opportunities.

At national level, the strategy for ICT adoption in the tourism sector is based on awareness initiatives, incentives for modernisation and as a particular focus in Destination systems development. A special reference should be made to e-Tourism in Austria, a particular approach revealing the recognition of the strategic role of the sector.

There are few regional or stakeholders deliberate strategies identified. This does not mean they do not exist but reflects a low level of articulation between general and local actions. The need to systematically collect and disseminate documents and information about strategies remains a priority.

## **5. IDENTIFY GAPS WITH REGARD TO SUCH POLICIES/STRATEGIES AND MEASURES**

Experts' contributions identified domains where the permanent evolution of Information Society Technologies creates barriers and difficulties for tourism stakeholders. These obstacles must be overcome by a coherent set of measures and support actions. Their identification is the main goal of this working group.

The areas requiring specific measures can be structured under seven headings:

### **5.1. Organisational perspective**

Global reach and non-stop operations are two characteristics of this new-networked environment. Permanent availability and global presence dramatically changed the notions of time and space of business activity, including in tourism. Pervasive computing extends this permanent reach to all types of fixed and mobile devices.

Tourism enterprises in general and especially SMEs are challenged to adapt their internal and external processes, evolving to multi-channel flexible operations.

### **5.2. Structural perspective**

New players – information brokers – reshape access to clients, creating and controlling the mediation channel according to their particular criteria. Therefore, tourism actors face several obstacles in managing the relations with information carriers and distributors trying to assure a minimum level of control over information content and flow. The traditional roles and competitive advantages are weakened, endangering the sustainability of traditional players in the value chain.

Clear adaptive and innovative strategies are required, creating new partnership and co-operation models, in order to reach critical mass and competitive power and assure SME visibility across the new value chain.

### **5.3. Systemic dimension**

The value of information imposes new dissemination models and new attitudes towards non-commercial information. Contents will play a decisive role in the decision process and access to public information resources can be used to generate differentiation and market advantage.

The policies on access to information defined by primary sources, usually public and/or non-profit organisations, will affect industry performance and ultimately will bring these actors to the market. The pressure of information brokers on these information sources is going to require new information quality standards, transparent distribution criteria and consistent management. Information integrity and responsibility shared between local, regional and national levels as well as between tourism and specific domain bodies (culture, environment, transport, etc.) will require better co-ordination.

#### **5.4. Commercial domain**

New competitors and low barriers to entrance, newly empowered customers driven by new motivations and market behaviour, cross border perception of destinations: these are leading forces for change in the commercial environment. Flexible and customised products, emerging new segmentation criteria, permanent on-line real-time availability and one to one relations are shocking the old market structure and marketing concepts. They are challenging tourism enterprises to operate in a complex scenario where old and new market rules coexist.

#### **5.5. Law and taxes**

From personal data protection to intellectual property rights, an all-new regulatory framework affects tourism directly and weakens traditional ownership rights. Tourism actors are not prepared to deal with this new level of complexity.

The specific tourism legal framework was not conceived to deal with the virtual dimension of the market. Liability rules do not keep up with on-line commercial relations and complex multilateral relations created by info mediation processes.

The European fiscal framework and the virtual networked-location for business affect the competitive performance of European companies. SMEs with less flexibility to move outside the EU are highly exposed to the commercial aggressive positioning of companies that are legally operating from “tax paradises” with equal access to the European market.

Legal and tax scenarios must adapt to new market conditions assuring fair competition and similar liabilities in the electronic market.

#### **5.6. Social perspective**

Successful Information Society deployment policies must consider both the deepest and more static level of the system: individuals and mental structures.

ICT based services adoption stressed the need to develop human potential in the tourism sector. New skills and new attitudes are needed, adapting existing human resources to a more knowledge demanding performance. A coherent approach to the learning process is required, transforming business vision, and management concepts as well as communication skills. The availability of information and knowledge, at all levels of operation, is becoming a basic requirement.

Competence centres, virtually connecting the industry and the new knowledge domains, revealed great potential to influence the rhythm of change. However, actions should be able to meet the actors in their own environment, making use of technology itself to communicate (as is also emphasised in the Learning Area concept from WG B).

## **6. CONCLUSIONS AND RECOMMENDATIONS, INCLUDING SCOPE FOR GREATER CO-OPERATION BETWEEN CONCERNED AUTHORITIES, AND BETTER USE OF ALREADY EXISTING INSTRUMENTS.**

The enormous challenge that European tourism faces requires a clear commitment at all levels to assure successful development. No strategy can succeed if it ignores the critical issues faced, in the digital revolution, by the tourism sector.

In trying to establish priority co-operation domains, the Working Group specified three recommendations based on the gaps identified above.

### **A – Establish a European Knowledge Network for e-Tourism, giving access to relevant information and knowledge on a wide spread access platform.**

This Knowledge Network for e-tourism should provide the interconnection between existing national, regional and European centres and initiatives with a common access point for all stakeholders.

The main tasks of this Knowledge Network will be to:

- Organise the transfer of know-how on ICT based services amongst tourism stakeholders;
- Disseminate relevant information on policies and support measures affecting e-tourism development, at European and Member state level;
- Promote best-practice exchange and analysis;
- Promote partnership and co-operation whenever European added value is identified;
- Stimulate the development of a coherent learning framework for the Information Society in Tourism.
- Integrate and complement ICT impact indicators and studies, aimed at measuring the adoption of ICT based services by the sector as well as e-market size and its value evolution.

*European role:* set-up and manage the supporting infrastructure and stimulate the dialogue between stakeholders.

*National Administrations role:* identify and network national initiatives and adapt the global communication strategy to local conditions.

*Regional and local level:* extend the networking effect to SMEs, based on local needs and development stages.

The Knowledge network for e-Tourism should be a light physical structure providing an advanced digital collaboration platform, a large and open umbrella bringing together existing

European (e.g., IST research projects and support measures), national and regional initiatives, tourism stakeholders representatives and EU tourism administrations.

Due to its flexibility, this network should also be able to provide the adequate framework for supporting measures proposed by the working groups A, B, C and D.

## **B – Establish two special Interest Working Groups for specific urgent questions:**

### **B.1 Mobile e-commerce services for tourism.**

This Working Group should involve tourism actors (public and private), telecommunications operators for mobile services, equipment producers and mobile service developers and providers with the following mandate:

- To analyse problems affecting market development for mobile services in the tourism sector;
- To evaluate the potential growth of the mobile services market;
- To define and propose new access conditions and pricing models in order to facilitate mobile Internet services development in the tourism sector.

### **B.2 – Legislation and Tax regulations**

This Working Group should be primarily based on industry representatives, national administrations and the Commission services related to this field. The mandate of the group will be to:

- Compare European and non-European legal and tax policies;
- Assess the adequacy of the existing legal framework for tourism;
- Assess legal and tax regulation impact on European tourism competitiveness;
- Propose concrete changes in both fields to improve the present situation.

Both working groups should report to the Tourism Advisory Committee.

The creation of other Special Interest Groups in the framework of the e-Tourism Knowledge network could, in the future, be adopted as an effective methodology for addressing other specific issues.

## **C – Establish a support centre to enhance market integration for SME through Destination Management System.**

DMS have been mentioned in this report as key enabling systems for the access of SMEs to e-commerce. The mission of this centre will be to provide a platform to support co-operation between European, national and regional initiatives and to promote the complementary developments required to improve Destination Management Systems (DMS) performance and impact.

Several co-operation domains have already been identified: quality information management processes, multi channel enabling architectures, data interoperability and seamless integration with commercial systems, solutions for SME integration with DMS.

*European role:* provide electronic infrastructure; co-ordinate research and Information Society Programme with identified needs.

*National level role* (Tourism Administration and National Tourism Boards): identify priority areas and co-ordinate regional participation on a voluntary basis; identify and disseminate best practice.

**Finally** all Working Group members stressed two issues:

- The wish to see the tourism unit systematically involved in relevant European policies to ensure that tourism needs and priorities are fully taken into consideration.
- The need to extend the life of the group. It is felt that after 6 months of work and 4 meetings, the group is now starting to find the necessary level of communication and that there is still a long way to go.

**MANDATE**

*Working Group E: Managing the impact and use of “Information and Communication Technologies based services” in the tourism sector*

- Identify the Information and Communication Technologies based Services with a major relevance for public and private stakeholders in tourism, notably SMEs.
- Assess the awareness, accessibility and use of these services by the different tourism stakeholders, and their present and likely impact on European tourism and tourism enterprise activities and on the respective structure, performance and competitiveness.
- Identify relevant strategies and measures, at community, national, regional and local authority level, and those used by other major players for seizing the opportunity and managing the impact and use of these services among tourism stakeholders.
- Identify gaps with regard to such policies/strategies and measures
- Conclusions and recommendations, including scope for greater co-operation between authorities concerned, better use of existing instruments.

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