

MEMBER STATES' ANNUAL TOURISM REPORTING TEMPLATE

Article 3 of Council Decision 86/664/EEC¹ of 22 December 1986 establishing a consultation and cooperation procedure in the field of tourism stipulates 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. The Commission shall inform the other Member States thereof".

The following reporting form aims at facilitating compliance with this Council Decision.

SECTION 1 TOURISM ORGANISATION AND GOVERNANCE

This section is aimed at reporting on the following:

- **Administrative organisation**
- **Territorial organisation**
- **Organisation and links between the national tourism authority and the provinces / regions**
- **Organisation and links between the national tourism authority and industry associations, stakeholders and customers**

1.1. Please provide a **short description of the administrative and territorial organisation of public bodies responsible for tourism**, indicating the relationship and cooperation between national, regional and local bodies of the core responsibilities and competences of each department (Max. 3000 characters)

The Ministry of Economic Affairs is responsible for tourism policy at the national level. The Ministry's responsibilities include:

- (partially) funding of NBTC Holland Marketing, which is responsible for the international marketing of the Netherlands and the attraction of international conventions;
- stimulating innovation, entrepreneurship and sustainability; the tourism industry can make use of a range of general policy instruments available within the ministry;
- stimulating the synergy between nature, recreation and entrepreneurship;

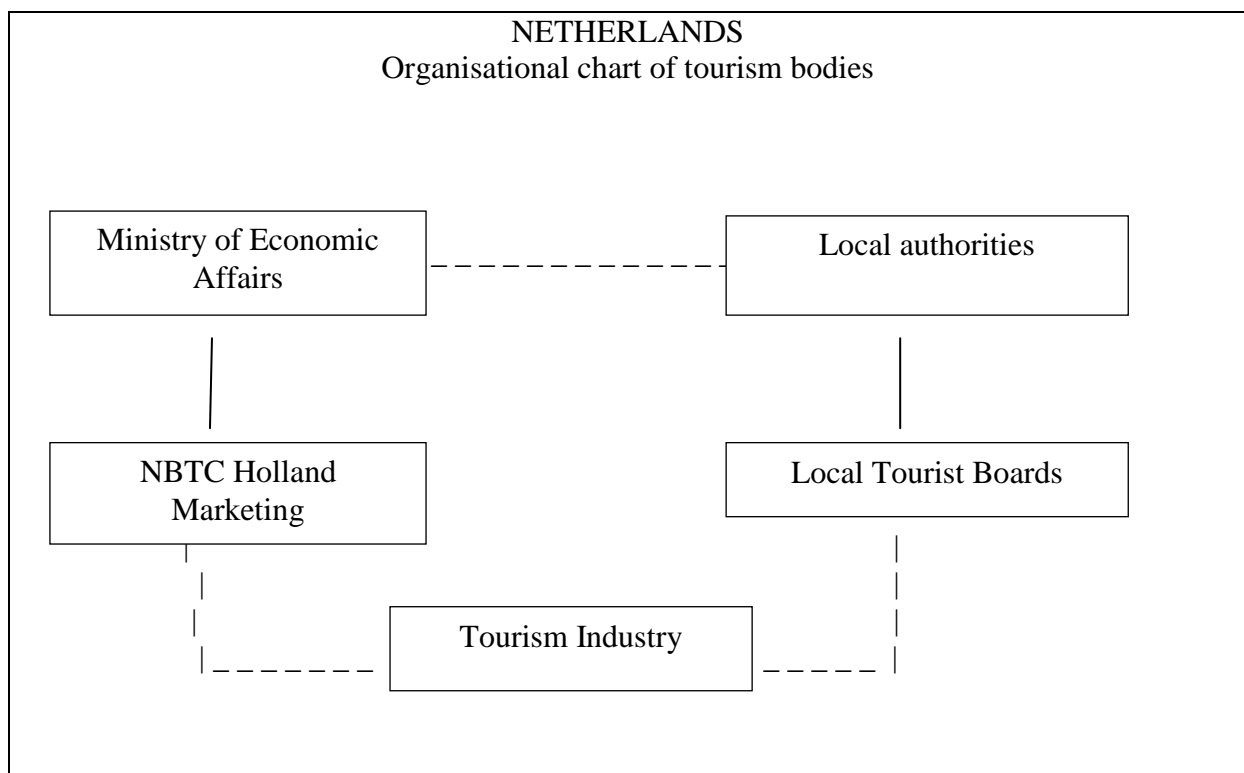
¹ <http://eur-lex.europa.eu/Notice.do?val=123070%3Acs&lang=en&list=123070%3Acs%2C&pos=1&page=1&nbl=1&pgs=10&hwords=>

- acting as the first point of contact within central government for tourism industry associations and stakeholders.

Regional and local authorities are responsible for tourism policy at their own levels, and deal with tourism matters such as:

- funding regional and local destination marketing organisations which are responsible for domestic and international marketing of the regional or local destination; product development.

1.2. Please provide an **organisation chart** reflecting the above described administrative and territorial organisation.



1.3. Please list and describe briefly the **relationship and main areas of cooperation between national/regional public tourism bodies and the most significant / active private organisations / stakeholders / industry associations / unions / consumer organisations.** (Max. 1500 characters)

NBTC Holland Marketing (Netherlands Board of Tourism & Conventions) uses a Private Public Partnership (PPP)-model in order to create the joint cooperation necessary for the organization of marketing programmes. This allows a variety of different partners to bundle their budgets and other investments around a shared goal or interest. They can be public partners (national, provincial and municipal authorities of regional tourist boards), public-private partners (marketing and promotional organisations) and private partners (businesses in the visitor sector and related sectors) in the Netherlands and other countries.

1.4. What is the existing national/regional specific legislation on tourism? (Max. 500 characters)

None. The Netherlands has a generic approach, no specific legislation on tourism exists.

SECTION 2 - MEMBER STATE ECONOMIC DATA AND TOURISM BUDGETS

This section is intended to provide an overview of the key statistical information about the general tourism economic environment of the Member States.

Data marked with **green** is also collected by Eurostat. Data marked with **orange** is equally collected by the OECD. The data categories match the templates of these two organisations, therefore data reported to the Commission can be transferred / used when reporting to Eurostat and OECD and vice-versa.

The statistical data provided in the tables below shall cover the year 2015 and, **if available**, 2016.

The data collected through these sections will also feed into the future Virtual Tourism Observatory.

Please use the Excel templates provided below in order to facilitate coherence and comparability of the data.

Please note that you are only requested to fill in data that is available in your country. Please insert "N/A" for those that you are not able to provide.

SECTION 3 NATIONAL TOURISM POLICY AND STRATEGIES

This section aims at collecting information on the Member States general strategic vision as well as the specific objectives of their tourism policies.

3.1. Please provide information in bullet points on the key mission, main medium and long-term objectives and the main targets of your national tourism policy. (Max. 1500 characters)

The Netherlands tourism policy focuses on:

- promoting incoming tourism via Holland Promotion and the activities of NBTC Holland Marketing;
- improving the business climate for the hospitality sector by reducing the regulatory burden;
- enhancing the sustainability of the hospitality economy;
- promoting synergies between nature, outdoor recreation and entrepreneurship;
- an excellent, innovative hospitality sector in an attractive society.

3.2. Do you have a multi-annual national tourism strategy specific / relevant for tourism in place? If yes, please describe in bullet points the main medium and long-term objectives of the strategy as well as **who is responsible for its implementation. How is the implementation monitored and how often?** (Max. 2000 characters)

Within the Dutch sector, we are working to put the Netherlands on the map as the destination with the largest diversity of experiences per square metre worldwide. In 2013 a sector-wide Hospitable Economy Action Agenda aimed at maintaining a high standard of tourist attractions was formulated in partnership with the government and the education sector. Key projects within this agenda focus on the better utilisation, connection and further improvement of the Netherlands' unique features. In addition to promoting inbound tourism and a better year-round and geographic spread of visitors, the Ministry of Economic Affairs also wishes to improve the business climate for the Dutch hospitality sector by reducing the regulatory burden and fostering synergy between nature, recreation and enterprise. The national council for the sector, Gastvrij Nederland, has taken responsibility for monitoring key projects on the agenda.

The main medium and long-term objectives are to:

- attract more tourists to the Netherlands;
- achieve a more even spread throughout the year and across geographic locations by involvement of other Dutch regions and improvement of the public transport for tourists;
- achieve a reduction in undue regulatory burdens.

To attract more tourists and achieve a more even year-round and geographic spread of tourists the HollandCity concept was developed by NBTC and industry partners, in coordination with the Ministry of Economic Affairs and provinces. In 2017 and 2018 NBTC will work with provincial authorities and market operators to further develop and introduce this concept.

To reduce the undue regulatory burdens the Ministry of Economic is deploying a sectoral approach to the hospitality industry. Problem areas have been identified and taken up with public-private partners.

4. TOURISM CHALLENGES, MEASURES AND INITIATIVES

This section aims at collecting information on the challenges the Member states and the tourism industry has to deal with as well as the measures put in place to tackle them.

4.1. Please identify the key challenges for the tourism sector in your country and indicate their importance /priority in the table below.

CHALLENGES	IMPORTANCE / PRIORITY		
	HIGH	MEDIUM	LOW
Diversification of the tourism offer	X		
Protection of the cultural heritage		X	
Protection of the natural heritage	X		

ICT and innovation, digitalisation	X		
Collaborative economy in the tourism sector			X
Connectivity and transport	X		
Employment in tourism – improving the perception of the sector as a career opportunity	X		
Improving education and skills in tourism	X		
Combatting seasonality	X		
Demographic changes		X	
Improving accessibility of tourism		X	
Improving socio-economic data in tourism		X	
Economic crisis and recovery		X	
Improving investment in the sector		X	
Improving the sustainability of tourism offer		X	
Combatting climate change		X	
Improving the quality of tourism offer	X		
Developing responsible tourism practices		X	
Competition against other destinations		X	
Administrative / regulatory burden, bureaucracy, improvement of the business environment	X		
Other, please specify			

4.2. Please describe briefly the main measures in your country aimed at tackling the key high-priority challenges indicated above. (Max. 2000 characters)

The HollandCity concept

The features that interest visitors in diverse parts of the country offer openings for regions to profit from the economic benefits of tourism. At the same time, this can help to prevent tourism from becoming concentrated in only a few places. To enable more parts of the Netherlands to tap into the opportunities of growing tourism, a more even spread is needed throughout the year and across geographic locations. The HollandCity concept developed by NBTC and industry partners presents the Netherlands as a single large metropolis. The idea is to inspire visitors to step off the beaten track through a three-pronged strategy centring on events, districts and storylines (employing a fictitious metro network). This strategic events, districts and storylines policy employs cultural and regional themes to promote the Netherlands. In 2016, for example, domestic and foreign promotion focused on 'Jheronimus Bosch 500', with a year-long programme dedicated to the artist on the 500th anniversary of his death. The year 2017 will showcase 'Mondrian to Dutch Design'. HollandCity's fictitious storylines link themes that interest visitors to various places throughout the country. Van Gogh, for instance, connects Amsterdam, the Arnhem region and its Kröller-Müller Museum, and Brabant. On 20 June 2016 NBTC officially launched the storylines in coordination with the Ministry of Economic Affairs and provinces. Additional storylines introduced last year are 'Holland: Land of Water' and 'Mondrian to Dutch Design'. Existing thematic trails such as the

'Liberation Route' and 'In the Footsteps of Van Gogh' have also been incorporated in the HollandCity concept. Eleven of the Dutch provinces are now participants in these storylines (the only exception is Groningen). In 2017 and 2018 NBTC will work with provincial authorities and market operators to further develop and introduce the remaining storylines.

Public transport improvements

Crucial to achieving a wider tourist spread is a good and user-friendly public transport system. In 2016, transport operators launched a package of new products tailored to the interests of tourists. Among the new products is the Holland Travel Ticket, which offers unlimited access to public transport throughout the country. New and better products are also being developed regionally. The Rotterdam-The Hague metro region have introduced a Tourist Day Ticket for the whole South Holland province and in the Amsterdam metro region the City and public transport providers GVB, Connexxion, EBS and NS are in talks about a new Amsterdam and Region Ticket, which is expected to become available in the first half of 2017. Another improvement to services are the public transport pop-up desks at Schiphol Airport, which make it easier for tourists to get information about public transport. A credit card payment option was already added to ticket machines some time ago. Transport operators will be conducting an evaluation after one year to determine whether the new product package adequately caters to international tourists. Among the aspects that will be evaluated are sales points, pricing and ease of use. The resulting data will be used to make further improvements.

Sectoral approach to the hospitality industry

To innovate, businesses need room to develop their initiatives. With this in mind, the Ministry of Economic is deploying a sectoral approach to the hospitality industry, directed at reducing undue regulatory burdens. Problem areas have been identified and taken up with public-private partners, resulting in the formulation of an Action Programme for Problems in the Hospitality Industry. The government and business sector are now implementing the agreements formulated in this programme.

Next-generation national parks

A new national parks programme was initiated at the beginning of 2015. The World-Class National Parks programme seeks to enhance the quality of the country's national parks, boost public engagement with nature and strengthen the brand and market position of the country's national parks. As one of the key projects in the hospitality industry agenda, this programme will develop new revenue models and new recreational concepts centring mainly on lodging. With Gastvrij Nederland as one of the partners, the programme links up with the broader agenda. Between May and October 2016 the World-Class National Parks programme conducted a nationwide survey which identified the public's top three nature areas. These are the Dutch Wadden Sea, the Hollandse Duinen National Park and the Veluwe region.

4.3. Please identify if any of the above mentioned challenges relate to any legislative measures at EU level, and how. (Max. 1000 characters)

Reduce the legislative/regulatory/administrative burden.

4.4. Please identify and describe any measures implemented in your country to increase tourism flows from other EU Member States and from third countries. (Max. 1000 characters)

Activities of NBTC Holland Marketing based on a multi-annual marketing strategy.

- 4.5. Please describe how promotional measures implemented in your country make use of / capitalise on the promotional campaigns carried out by the Commission** (i.e. Ready for Europe, Europe. Wonder is all around, EDEN, low-season tourism campaigns, etc.). (Max. 1000 characters)

The Netherlands has in the past participated in the Eden award.

- 4.6. Please identify and describe any measures /actions in your country which contribute to maximising the potential of national policies for developing tourism** (e.g. ensuring that tourism interests are taken into account in the development of other policies which may have impact on tourism). (Max.1000 characters)

Tourism is an integral part of the enterprise policy in the Netherlands. The enterprise policy has a predominantly generic character with a focus on promoting innovation, easing the regulatory and administrative burden, expanding access to capital market financing, public services to business owners (i.e. Chamber of Commerce, the Answers for Business website (ondernemersplein.nl) and e-government), providing tax-related and other support to entrepreneurs, maintaining the business climate and attracting investments from abroad.

Tourism boosts the level of services and improves the business climate. A varied offering of recreation, nature, culture, attractions, hotels and restaurants makes the Netherlands an attractive country in which to live and work. As such, the hospitality industry is an important contributor to the Dutch economy and receives targeted support within the generic enterprise policy. In order to serve the growing number of international and domestic guests, a good-quality range of services and facilities is required that is able to respond to changing customer requirements. To achieve this and retain the right focus, the sector, together with the government and education, has drawn up a Hospitable Economy Action Agenda.

See also 3.2 Hospitable Economy Action Agenda of the hospitality sector (tourism, recreation) and 4.2 main measures for key high-priority challenges.

- 4.7. Please identify and describe any measures/actions in your country which contribute to maximising the potential of EU Financial Instruments for developing tourism** (e.g. information on main objectives, financing opportunities, training courses, etc.). (Max. 1000 characters)

The Netherlands has a generic approach to entrepreneurship and innovation. Tourism has not been a priority in most of the Dutch Operational Programmes of EFRO.

- 4.8 Please describe shortly which EU programmes are used the most frequently and for what purposes of tourism development in your country.** (Max. 1000 characters)

No information available

Sustainable and responsible tourism, whether talking about economic, social or environmental sustainability, is a broad concept and may be interpreted in various ways depending on the attributes of a Member State or region.

The following questions focus on sustainability and responsibility in tourism as described in the 2007 Commission Communication² on an agenda for sustainable and competitive European tourism.

4.9. Sustainable destination: What support is given to strengthen destination management at the national /regional/local level (e.g. supportive policy environment, knowledge networks, training programmes, technological support tools, financial support, promotional activities, etc.)? (Max. 1000 characters)

HollandCity concept (see also 4.2)

Together with NBTC and provinces, the Ministry of Economic Affairs aims to promote sustainable growth of tourism through a more balanced distribution of the expanding numbers of tourists throughout the year and across the country. This will enable other parts of the Netherlands to benefit from tourism, while avoiding overcrowding in certain other places in the Netherlands.

Holland Travel Ticket (see also 4.2)

Crucial to achieving a wider and more sustainable tourist spread is a good and user-friendly public transport system. Transport operators have launched a package of new products tailored to the interests of tourists. Among these new products is the Holland Travel Ticket, which offers unlimited access to public transport throughout the country. Another improvement to services are the public transport pop-up desks at Schiphol Airport, which make it easier for tourists to get information about public transport and the new Holland Travel Ticket.

Green Deals strategy

The Dutch Government helps its people with local sustainable projects by means of a 'Green Deal'. Citizens, companies, local councils and stakeholder organisations are continually finding their own ways of being more sustainable. These initiatives are sometimes hard to start, because of confusion about licences, lack of collaborative partners, or ambiguous regulations. The government helps to remove some of these barriers and achieve more rapid results. A total of eight Green Deals have been signed with the recreation sector and one for outbound tourism. The aim is to demonstrate the potential of green growth.

4.10. Sustainable businesses: What support is given to strengthen the sustainability and competitiveness of tourism businesses (e.g. supportive policy environment, knowledge networks, orientation of business support services to sustainability, training, financial incentives, promotional activities, etc.)? (Max. 1000 characters)

Generic instruments of entrepreneurship and the Green Deals strategy. Field 4.9 contains the explanatory text.

² http://ec.europa.eu/enterprise/sectors/tourism/documents/communications/commission-communication-2007/index_en.htm

4.11. Responsible tourism: What support is given to tourists and the tourism industry to promote their responsible practices and choices (e.g. awareness raising, sustainability in education, national marketing and media campaigns, promotion of certification schemes, etc.)? (Max. 1000 characters)

The Netherlands has a generic approach to social responsible entrepreneurship. The main organisation for social responsible entrepreneurship, MVO Nederland, inspires, connects and strengthens companies and sectors to take far-reaching steps in the field of corporate social responsibility (CSR). MVO Nederland was set up by the Ministry of Economic Affairs in 2004. CSR implies that companies take responsibility for the impact of their business activities on people and the environment. Through CSR companies try to tackle social and environmental challenges and find new opportunities for products, services or processes. One of the platforms of MVO Nederland is the MVO Network Tourism. It is the starting point for tourism companies who want to undertake their business activities in a sustainable manner. Participants from companies, knowledge institutes, social/community organizations and public authorities meet to thrive on more sustainable tourism. Once a year the 'Groeneveld Conference' is organized, focusing on sustainable tourism entrepreneurship.

Green Key / Blue Flag: Business organisations developed the certification schemes Green Key and Blue Flag.

4.12. Please describe maximum three of the most significant planned / future tourism measures (legislative or non-legislative) which envisage to impact travellers visiting your country from other Member States or from outside Europe. (Max. 1000 characters)

Stimulate spread in time and space: HollandCity concept

The visitor mix in 2025 will put extra pressure on attractions and cities in peak times. A spread of visitors in time and space offers opportunities to decrease this pressure, and to give visitors the experience that meets their expectations. Examples are stimulating visitors to stay in cities other than Amsterdam, and to extend the season for coastal holidays among the growing group of active seniors. Field 4.2 contains a more elaborate explanatory text.

5. ADDITIONAL INFORMATION

5.1. Please describe maximum 3 best practices of tourism measures implemented at national, regional or local level (any type of activity). (Max. 2000 characters)

Field 4.2 contains the explanatory text for the following best practices:

1. HollandCity concept
2. sectoral approach to the hospitality industry
3. next-generation national parks

- 5.2. Please describe, in a concise manner, in your view, what policy developments / actions / activities would you expect from the Commission's tourism team that would serve better (than the current ones) the EU Member States and the industry. (Max. 2000 characters)**

Exchange of best practices.

Stimulate cooperation and/or joint actions on a voluntary basis.

THANK YOU