



Developing better synergies between mountain value chains and tourism: ACTION PLAN



Mountain areas have a wide tourism potential: 95 million long-stay tourists and 60 million day-trip visitors visit the Alps every year for instance. Tourism is now one of the major economic sectors in the European mountains despite strong contrasts: the OECD estimated that tourism accounted for 10-12% of the Alpine labour market including jobs directly and indirectly linked to tourism, but only 10% of municipalities have large tourism infrastructures, whereas 40% of municipalities don't have tourism activity in this area.

To face the challenges in the tourism sector, Euromontana believes that:

1. In future all European Tourism should be **sustainable**, fully taking into account the economic, social and environmental dimensions, as the only way to preserve the interest of tourism destinations in mountain areas in the long run. Sustainability is the cornerstone that can create real opportunities for tourism activities in mountain areas.
2. Future European tourism should encourage **all tourism destinations to become more competitive**, to foster the value chains of tourism in their crucial role for mountain economies, and help to enable mountain entrepreneurs to adapt to these challenges: facilitating access to finance, developing the use of ICT and extending high-speed broadband in mountains areas and encouraging a better trained workforce, especially among young people.
3. Future European tourism should **diversify and encourage new forms of tourism**: agritourism, accessible tourism, cultural, natural and activity based tourism. These actively contribute to experience tourism that tourists are increasingly looking for.
4. Tourism with a clear focus on mountain areas must become a **priority of policy actions** at the various European and state levels. The importance of the tourism sector should be reflected by developing **integrated strategies at European and national levels**: tourism aspects should be taken into account in all policies (like transport, rural development, agriculture etc) that can have impacts on the tourism sector. Developing **common destination marketing** at regional level will also help mountain areas to increase their tourism attractiveness.

According to the last flash Eurobarometre, in 2014, the main reasons for going on holiday is nature (mountain, lake, landscape) for 30% of EU28 travellers and culture (religious, gastronomy, arts) for 25% of travellers. Thus, there is a **huge potential tourism market in mountain areas and the valorisation of quality mountain products can enhance this tourism offer. In that sense, we should encourage and develop synergies between mountain actors, in charge of tourism and of mountain products supply chains**, to see how they could collaborate together and strengthen the tourism offer.

In the framework of our project "A new CAP – Mountains of opportunities", one session on "developing better synergies between mountain value chains and tourism" was organised on 24th October 2014 during the European Mountain Convention. This action plan is the result of the work done during this workshop and focuses on how to encourage agritourism and how to develop integrated strategies and common destination marketing at regional level for mountain areas.



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Assesment of the current situation

To develop agritourism in mountain areas, farmers and tourism actors encounter several difficulties. The following are the main barriers:

- **Local products are not always sold in national/international chain shops, at local and national levels:** many local chain shops cannot use local products because of procurement/buying policies, standards and quality issues and consistency and scale of supply. National chains may ignore local suppliers through policy or practice, often because of poor perceptions. In addition, scale and volume remain a barrier, particularly for smaller communities with smaller suppliers. When coupled with short but high volume tourism seasons this can create a very short but severe demand issue.
- **Difficulties arise when having farmers and tourism actors jointly working together:** local interest in cross sectorial working is not high at times. Often the need is not recognised by local actors or suppliers, local actors need to be convinced of the interest of working together. Time is always a challenge to establish any network or collaboration – local small suppliers and actors do not have the time to devote to developing collaborations /cooperation's and to administer them. In addition, lack of, or differently perceived professionalism or quality standards may be a factor in the lack of cross sectorial collaboration.
- **Adaptation to a changing market:** Adapting to changing market needs (scale, different product, trends etc.) can create difficulties for small mountain suppliers and tourism businesses. Changing practices and processes to remain competitive and attractive can be a perennial problem. Furthermore, lack of ICT, access to high speed and consistent quality broadband and lack of skills with modern digital technologies and social media is becoming a barrier more frequently, especially with the rapid growth in uses of these for businesses.
- **External obstacles to overcome:** Representation/structures/administration regularly represent a difficulty to local supply chains– particularly in any set-up phase or when developing new products or services. Climate change presents a new and ever changing dynamic for mountain tourism actors and mountain supply chains – this may also be a barrier to significant growth and development. This can be especially evident when local infrastructure and service delivery are impacted by the effects of climate change (floods, land slips, erosion) that restricts or changes access to customers or suppliers.

The following examples “*Mountain Products Road in Croatia*” developed by the Local Development Agency PINS, in Croatia, “*Promoting agricultural and artisanal business in the Alpine region tourist industry*” developed by SUACI, Alpes du Nord in France and “*Marketing Tourist Farms in Brkini and Kras*” developed by the Regional Agency Kraska in Brkinov in Slovenia show that local and regional initiatives can successfully overcome these difficulties. Tourism and mountain food actors should use the good examples already out there and adapt them to their own situation. But one of the key success conditions is to have motivated actors, willing to work together.

As a result, to improve the links between tourism and supply chain actors, the following concrete actions should be encouraged:

- **Direct selling** from farms, forests and local businesses helps create the story (that tourists are more and more looking for) – farmers and tourism actors should work in collaboration through local selling points. This helps maintain the link between the product and the ‘real world’ mountain experience.
- When supplying larger businesses and the public sector, **consistency of collaborative offerings and supply reliability** are really important factors.
- **Confirm interest of suppliers and tourism actors** when moving forward to ensure profitability of actions. Many actors may not be interested at that point in time and being ‘railroaded’ into change is not a positive feature. It is also important to regularly check that all interests in a local collaboration are being met by the actions of the collaboration to keep all actors and suppliers positive and effective.
- **Better use of ICT** has led to better actions but more skill and knowledge is required to maximise this improvement – webinars 3G/4G, use of web selling tools can be used to increase the skills.

Recommendations on policy and strategy to improve links between tourism and supply chain actors

We recommend:

At local and regional levels

- Not always reinventing the wheel: **learning from others**, adapting to local circumstances and transferring the good practices found in other areas should be a first step.
- **Creating and developing local business networks on agritourism** – Formal or less formal – to encourage and support the use of local key champions/managers/experts to coordinate networks. As this is the case in some Norwegian municipalities, one territorial manager could be in charge of knowing the different actors working in tourism and food products and help them to know each other and to organise their cooperation.
- Regional and local policy-makers should encourage the development of **training programmes**, in particular regarding ICT, to improve the skills of farmers and tourism actors, and this would also help them to work together if they have a better knowledge of ICT tools.
- **Quality of mountain products** is not just about the science and technical aspects; it is also about the **experience and the customer journey**. This should be more of a feature in future policy making and in the marketing of mountain products.
- Not all policies should be focused on growth but on survival and stability as well as encouraging local people to start new businesses – especially the next generations. Growth could equally be the **number of suppliers** and not just the expansion of existing suppliers.
- Tackling the problems created as a result of **climate change** needs to be factored into policy making to better identify to opportunities that climate change may present in mountain areas, especially for mountain supply chains and the different products and that may need servicing.
- Some regulatory issues at local level for things like land use, development policy etc. may need to be re-visited to maximise mountain supply chain development. Additionally, issues such as insurance, the law on collaborations and taxation may need some further consideration to be more effective in encouraging collaborative activity.
- **Taking into account local population** at all times but especially when changing regulations or policies. Having local mountain supply chain experts and advisors contributing to policy development would be a good starting point. It could be encouraged through the development of Local Action Groups under the LEADER approach.
- Local and regional actors should use the EAFRD (European Agricultural Fund for Rural Development) to develop actions and in particular the actions linked to knowledge transfer and information actions (article 14), farm and business development (article 19) and basic service and village renewal in rural areas (article 20).

At national level

- National policy should be promoting the territory – behind this we, the mountain businesses sell all the mountain products. **Regional strategy should therefore be a doorway to the region**, within the national policy and the products available (commercial and public goods working together).
- Policies should provide for **professionalisation of the supply chain and tourism sectors**. Training, sharing of experience and continual professional development should be promoted and encouraged. A partnership between sector lead bodies, academic institutions and the mountain business communities to identify existing training/educational opportunities and to develop new and tailored ones would be a potential step forward.
- **Research and academic input** to develop existing and new opportunities in mountain communities should be encouraged. Academic partnership with mountain communities as part of a national initiative would be of great value.
- **Quality schemes and tourism regulations** are often too scientific, technical, administrative or complex for small producers and tourism actors. National and European policies could look for appropriate simplification.
- Focus on growth and corporate success/high profits in policies is not always appropriate - sometime a focus on the social and **quality aspects** of living and working in rural areas may be more beneficial and help create more sustainable, healthy and happy populations/communities.
- At a national level, the desire for growth may not be particularly well balanced with the other social and environmental needs that are particularly evident in mountain areas. Considering the usefulness and implementation of policies in a range of communities is necessary before policies are formally enacted. **'One size fits all' policy making is to be discouraged** and policy making that can be adapted to the differing needs of a wide range of territories is far more positive.

At EU level

- Tourism policy (managed by DG Internal Market and Industry) and agricultural and rural development policies (managed by DG Agri) are divided and do not work well together at the moment. DG Internal Market and DG Agri should work together **to encourage agritourism in rural and mountain areas**.
- Despite its economic impact, Tourism European policy doesn't integrate the various priorities that impact on tourism (for example, tourism policies and climate change and energy policy). The European Commission should have a more integrated tourism policy.

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Action plan



Action 1: Lobbying action at EU level: Euromontana should help DG Internal Market to better understand and support the specificities of agritourism and DG Agri to better support tourism action under EAFRD programmes. This can be done by talking to EC representatives during European conferences, showing them concrete examples on the benefits of agritourism for rural development.

Timetable: starting end of 2014 and on-going action in the coming years by Euromontana secretariat.

Action 2: Develop a European project on agritourism (Interreg Europe could be an interesting funding scheme). This project could integrate:

A programme of exchanges and best practices sharing, first with a collection of Good Practices and Internet exchanges, then with actual physical exchanges during study visits in order to better understand the actions already taken in mountain areas to encourage agritourism.

The creation of a toolbox/matrix to improve agritourism for all mountain territories. This tool could gather /capitalise several practical tools already existing (such as the pilot platform of DANTE project, TourismLink, the deployment of ETIS indicators for more sustainable tourism) targeting farmers and tourism actors to encourage the actual development of agritourism in mountain areas.

Timetable: development of a project proposal to submit during 2015 (May /June 2015 if this is done under Interreg Europe funding scheme) by Euromontana secretariat and with Euromontana members

Action 3: Establish a Euromontana Tourism and Supply Chain Forum, as a forum for local networks, local cooperative or collaborative organisations of producers and tourism actors in regions to facilitate better cooperation, learning and sharing of both good practices and rising of common issues. This could be championed by Euromontana Board Members for the development and perhaps managed by a core group on interested member organisations. Actual meetings could be aligned with Euromontana Board meetings or could be separate once the forum is better established. As well as operating as a knowledge hub for these local networks and collaborations the forum could also identify areas of interest for joint training initiatives, common project activities and even inter-network secondments.

Timetable: on-going action from 2015 by Euromontana members.



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