



**MINISTÉRIO DO TURISMO**



**MINISTRY FOR TOURISM OF PORTUGAL**

**and**

**ORGANISATION FOR ECONOMIC CO-OPERATION  
AND DEVELOPMENT**

***NOTE: For technical reasons, this meeting has been postponed  
to a later date.***

**SEMINAR ON THE RESTRUCTURING OF TOURISM  
DESTINATIONS AND ENTERPRISE DYNAMICS**

**28-29 October 2004, Lisbon (Portugal)**

The meeting will take place at PAVILHÃO DE PORTUGAL (Pavilion of Portugal)-  
Parque das Nações, Lisbon (Portugal) and will start at 09:30 a.m. the first day.

OECD 2, rue André-Pascal, 75775 Paris Cedex 16, France, Tel : 33 (0)1 45 24 91 45  
Fax : +33 (0)1 44 30 62 57 E-mail : [alain.dupeyras@oecd.org](mailto:alain.dupeyras@oecd.org) [www.oecd.org/sti/tourism/](http://www.oecd.org/sti/tourism/)  
General Directorate for tourism, Av. Antonio Augusto Aguiar, 86, Lisbon, Portugal, Tel : 351 21 358 65 61  
Fax: 351 21 358 64 44 E-mail : [Manuela.viana@dturismo.min-economia.pt](mailto:Manuela.viana@dturismo.min-economia.pt)

**I. DRAFT AGENDA FOR THE SEMINAR ON THE RESTRUCTURING OF TOURISM DESTINATIONS AND ENTERPRISE DYNAMICS**

**Summary table**

<b>Thursday 28 October 2004</b>	
<b>8:30-9:30</b>	Delegate registration
<b>9:30-10:15 – Opening</b>	Opening statements by the OECD and Portugal
<b>10:45-12:45 – Session 1</b>	The competitiveness of the tourism destination and enterprises
<b>14:30-17:00 – Session 2</b>	The structural changes of the tourism industries
<b>Gala dinner</b>	
<b>Friday 29 October 2004</b>	
<b>9:00-11:00 – Session 3</b>	The competitive strategies of tourism destinations at international level
<b>11:30-13:00 – Session 4</b>	The need for a tourism policy accompanying structural change
<b>13:00-13:15 – Closing Session</b>	Implications for future OECD work
<b>Technical visit</b>	

## **Annotated agenda**

**Thursday 28 October 2004**

**9:30-12:45**

### **Opening statements by the OECD and Portugal**

#### **Session 1: The competitiveness of the tourism destination and enterprises**

Improving the competitiveness of tourism destinations is a constant challenge to all private and public actors in the tourism industry. Tourism services are largely dominated by small and medium-sized enterprises, whose role in developing the competitiveness of destinations is crucial. Large international tourism industry which organise travel, stay and accommodation also play a key role in the development of the destination. Large numbers of dynamic enterprises encourage competition and excellence and, in addition, drive the development of new products, innovation and new forms of co-operation that encourage growth in destinations. When added together, these market mechanisms help to improve the competitiveness of destinations.

The large enterprises apply global strategies but take advantage of tourism potentials at the destination level. For micro and small enterprises it is not always easy to adapt to competition and to play a part in improving the competitiveness of destinations. In particular, tourism entrepreneurs do not always realise that their activities are closely bound to the competitiveness of the destination as a whole.

After presentation of a background paper, Session 1 will proceed in the form of a round table debate between the public and private actors:

1. Remarks about the competitiveness of the tourism destination and enterprises
2. Round table debate between public and private actors

**Thursday 28 October 2004**

**14:30-17:00**

#### **Session 2: The structural changes of the tourism industries**

The tourism industry is in search of a new dynamic to rejuvenate tourism products, enhance growth and increase profitability. The structural changes affecting the tourism industry show that there is no longer a clear delineation between the various branches (hotels, leisure real estate, restaurants, travel agents, tour operators, transport, etc.) composing the tourism industry. Many changes are aiming in fact to obtain a better control of the tourism value chain and to reach the optimum size for the enterprise in order to be more competitive on larger markets; this situation influences the development of micro- and small tourism enterprises.

The new market dynamic calls for innovative forms of co-operation and partnership among tourism enterprises. Networks for inter-enterprise co-operation can generate synergies in given areas by forging special relationships between enterprises, based on mutual advantage, routine collaboration and the will to innovate, thereby cutting costs and making it easier to implement joint projects.

Session 2 will be organised around sectoral case studies (hotel industry, leisure real estate, tour operators, etc.):

1. Sectoral case studies presentation and discussion

**Friday 29 October 2004**

**9:00-13:15**

### **Session 3: The competitive strategies of tourism destinations at international level**

Developing strategies that can unlock the growth potential and enhance the competitiveness of destinations at the international level is a real challenge. Uncertainty over the return on investments in innovation and perceived high risk levels do not always encourage small destinations to embark on this path. Repositioning the destination at the international level requires a complex mix of measures such as developing brand names at the international level, greater specialisation in core activities and the most profitable segments, differentiating the destination from its competitors in terms of customers or products, and striving to achieve greater flexibility, for example, in the management of capacity.

Destination management can be a powerful instrument for achieving operational co-operation throughout the tourism service value chain. Business enterprises models that do not prove competitive must be reviewed to improve overall consistency.

Session 3 will be organised around 3 case studies:

1. The international tourism and travel industry as benchmark for the destination and for micro and small enterprises.
2. Revamping a destination in a coastal setting: how to modernise supply and increase sector productivity.
3. An initiative aimed at revitalising a destination in a rural and/or urban setting.

### **Session 4: The need for a tourism policy accompanying structural change**

To be competitive, tourism needs dynamic and modern enterprises, as well as effective action by the public sector. For governments, the main area of action in tourism will continue to be the establishment of a balanced policy framework allowing fair competition and ensuring maximum transparency for operators and consumers.

The links between all policies with a bearing on tourism development, as well as their coherence, need to be strengthened. Likewise, close co-operation between the public and private sectors will lead to the adoption of effective strategies that will improve the quality of tourism

destinations and create a favourable environment for enterprise development. The aim is to maximise the expected benefits from policies towards tourism enterprises.

At the level of the destination, tourism enterprises need to have a strategic vision which can strengthen their competitive position with regard to existing challenges such as international strategies for enterprise integration (alliances, mergers and acquisitions), innovation, modification of distribution channels and the emergence of new destinations. This strategic vision helps both the destination and the enterprises working there redesign their products and, as a result, diversify their supply.

Session 4 will proceed in the form of a round table debate among different governments:

2. Round table debate between public actors

### **Closing Session**

The Minister of Tourism of Portugal and the Chair of the OECD Tourism Committee will make a few remarks about the outcome of the Seminar. Particular attention will be given to the implications of the debate for future work on tourism policy at the OECD.

## II. GENERAL INFORMATION

### Venue of the Seminar and registration

The Seminar on “The restructuring of tourism destinations and enterprise dynamics” will be held in Lisbon (Portugal) on 28-29 October 2004. It is co-organised by the OECD and the Ministry for Tourism of Portugal. The Seminar will be held in the PAVILHÃO DE PORTUGAL (Pavilion of Portugal):

PAVILHÃO DE PORTUGAL  
Parque das Nações  
Rossio dos Olivais, Lote 2.13.01.A  
1198-014 Lisboa  
Tel. 351 21 8918 409

There is no registration fee for attending the Seminar and the social events. Participants are only requested to complete the attached registration form and to return it, by **30 September 2004**, to the OECD Secretariat and to the ICEP/ Portugal.

### Travel arrangements, transfers and accommodation

Participants are requested to make their own travel arrangements. The transfers of the participants will be organised on arrival and departure, as well as, when necessary, for joining hotels or for participating in social events.

Preferential room rates have been obtained for participants in the following hotels:

	Single room (breakfast included)	Double room (breakfast included)	Internet site for more information
<b>HOTEL TIVOLI TEJO 4*</b> Av. D. Joao II Parque das Nações 1990-083 Lisboa Tel. 351 218 915 100 Fax. 351 218 915 345 Email: <a href="mailto:htejo@tivolihotels.com">htejo@tivolihotels.com</a>	110 Euros	120 Euros	<a href="http://www.tivolihotels.com">www.tivolihotels.com</a>
<b>ALTIS PARK HOTEL 4*</b> Av. Eng. Arantes e Oliveira, 9 1900-221 Lisboa Tel. 351 218 434 200 Fax. 351 218 460 838 Email: reservations @ altisparkhotel.com	65 Euros	80 Euros	<a href="http://www.altisparkhotel.com">www.altisparkhotel.com</a>
<b>HOTEL VIP ARTS 4*</b> Av. D. João II, lote 1.18 1998-028 Lisboa Tel. 351 210 020 400 Fax. 351 210 020 401 Email: <a href="mailto:hotelarts@viphotels.com">hotelarts@viphotels.com</a>	87 Euros	94 Euros	<a href="http://www.viphotels.com">www.viphotels.com</a>

Note: Participants are requested to refer to the OECD Seminar when making their hotel reservation.

**Programme, documentation, working language and Internet web site**

Interpretation will be provided in English, French and Portuguese. The advance programme for the Seminar is attached; a more detailed version with the names of the speakers will be available at a later stage. The OECD tourism Internet web site [www.oecd.org/sti/tourism/](http://www.oecd.org/sti/tourism/) will provide easy access to information and documentation.

All participants, including accompanying persons, are invited to take part in the social events prepared by the Portuguese authorities. The social programme will include a gala dinner on Thursday 28 October and a technical visit on Friday 29 October in the afternoon.

SEMINAR ON "THE RESTRUCTURING OF TOURISM DESTINATIONS AND ENTERPRISE  
DYNAMICS"/  
SEMINAIRE SUR « LA RESTRUCTURATION DES DESTINATIONS TOURISTIQUES ET LA  
DYNAMIQUE DES ENTREPRISES »

28 AND 29 OCTOBER 2004, LISBON (PORTUGAL)/  
28 ET 29 OCTOBRE 2004, LISBONNE (PORTUGAL)

ANNEX I - REGISTRATION FORM//BULLETIN D'INSCRIPTION

Deadline//Date limite : 30 September 2004//30 septembre 2004

Last Name//Nom: ..... First Name//Prénom:.....

Business Title//Titre: .....

Country-Organisation//Pays-organisation: .....

Mailing Address//Adresse postale: .....

Postal Code//code postal: .....

Country//Pays: .....

Tel: .....E-mail//mél: .....Fax: .....

*When completed, please return to://A retourner rempli à:*

Alain Dupeyras  
Directorate for Science, Technology  
and Industry  
Head of the Tourism Programme  
OECD, 2 rue André Pascal,  
75775 Paris Cédex 16, France  
Tel: 33-(0)1.45.24.91.45  
Fax: 33-(0)1.44.30.62.57  
Email. [alain.dupeyras@oecd.org](mailto:alain.dupeyras@oecd.org)

**AND**

Felisbela Godinho  
ICEP Portugal  
Public Relations Department  
Av. 5 de Outubro, 101  
1050-051 Lisbon, Portugal  
Telephone: 351 217 909 500  
Telefax: 351 217 909 577  
Email. [felisbela.godinho@icep.pt](mailto:felisbela.godinho@icep.pt)